Oracle® Advanced Outbound Telephony

Implementation Guide

Release 12.1

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Oracle Advanced Outbound Telephony Implementation Guide, Release 12.1

Part No. E13404-04

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Oracle Advanced Outbound Telephony Implementation Guide, Release 12.1

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Preface

Intended Audience

Welcome to Release 12.1 of the *Oracle Advanced Outbound Telephony Implementation Guide.*

This guide is intended for members of the vendor organization who are responsible for implementing and administering Oracle Advanced Outbound Telephony.

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

- The principles and customary practices of your business area.

- Oracle Advanced Outbound Telephony.

- 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

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Accessibility of Links to External Web Sites in Documentation

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Structure

1 Introduction to Oracle Advanced Outbound Telephony
2 Dependencies and Integration Points
3 Before You Begin
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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 enter data, query, run reports, and navigate using the graphical user interface (GUI) available with this release of Oracle Projects (and any other Oracle E-Business Suite products). This guide also includes information on setting user profiles, as well as running and reviewing reports and concurrent programs.

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

Guides Related to This Product

Oracle TeleSales Implementation Guide

This guide describes how you can set up Oracle TeleSales so telesales agents can convert a sales inquiry or a customer call into an order. You must set up agent and

customer interaction tracking, enable web directory assistance for agents, enable web collaboration, set up opportunity forecasting so agents enter forecast amounts for a product line and receive sales credits, and set up marketing source codes to track the marketing activity responsible for a sale or a sales activity. Oracle TeleSales interacts with Oracle Scripting, Oracle Email Center, Oracle Marketing, Oracle Territory Manager, Oracle Product Lifecycle Management, Oracle One-to-One Fulfillment, Oracle Universal Work Queue, Oracle Sales, and Oracle Quoting.

Oracle TeleSales User Guide

Oracle TeleSales enables telesales agents manage the sales cycle, from prospects to booked orders. It offers a multi-channel selling solution that leverages all sales channels: whether selling over the phone, through the web or through mobile devices. Its E-Business Center offers a cross-application desktop for all Oracle call center applications, and provides elements of Service and Collections for a comprehensive customer view. You can use Oracle TeleSales for comprehensive customer management, list generation, lead, opportunity, and pipeline management, quote and order generation, event registration and collateral fulfillment.

Oracle Marketing Implementation Guide

Oracle Marketing provides the tools necessary to automate the planning, budgeting, execution, and tracking of your marketing initiatives. It provides a single repository of customer information that enables you to analyze, personalize, refine, and target your campaigns to better align with sales. You can set up fatigue rules to define contact limits by time period and by channel.

Oracle Marketing User Guide

This guide tells you how to create marketing programs, execute campaigns across multiple customer interaction channels such as Web, email, direct mail, and telemarketing, and monitor the performance of these programs. With Oracle Marketing, you can generate prospective customer lists and assess the effectiveness of these lists, and manage marketing collateral and marketing budgets.

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 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 11*i* 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 Diagnostics Framework User's Guide

This manual contains information on implementing and administering 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 Projects 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-Business Suite Multiple Organizations Implementation Guide

This guide describes how to set up and use Oracle Projects with the Multiple Organization feature for Oracle E-Business Suite, so you can define and support different organization structures when running a single installation of Oracle Projects.

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 Workflow Administrator's Guide

This guide explains how to complete the setup steps necessary for any 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 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.

Oracle E-Business Suite Integrated SOA Gateway Developer's Guide

This guide describes how system integration developers can perform end-to-end service integration activities. These include orchestrating discrete Web services into meaningful

end-to-end business processes using business process execution language (BPEL), and deploying BPEL processes at run time.

It also explains in detail how to invoke Web services using the Service Invocation Framework. This includes defining Web service invocation metadata, invoking Web services, managing errors, and testing the Web service invocation.

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.

1

Introduction to Oracle Advanced Outbound Telephony

Overview of Oracle Advanced Outbound Telephony

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

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

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

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

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

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

Features

Oracle Advanced Outbound Telephony extends the outbound calling capabilities of Oracle's Interaction Center suite of modules, which are designed for consistent and effective customer interaction handling in a multi-media, multi-channel e-business environment.

Oracle Advanced Outbound Telephony (Advanced Outbound Telephony) is a sophisticated application for managing the execution of outbound calling campaigns. It provides multiple automated dialing methods and extensive list management controls that improve the efficiency of outbound calling campaigns and maximize the productivity of the interaction center agents.

Out-of-the-box integration with Oracle Marketing greatly simplifies the workflow from the marketing process to managing of the contact process; coupled with out-of-the-box integration with Oracle TeleSales and Oracle Advanced Collections, the total solution eliminates the 'integration project' risks and provides a CTI-enabled applications to address the interaction center professionals for outbound calling.

Oracle Advanced Outbound Telephony provides extensive functionality critical to maximizing the effort of executing of calling campaigns. Oracle Advanced Outbound Telephony provides the following functionality:

- Record Release Strategies and Controls, page 1-2

- Oracle Intelligent Recycling Strategies, page 1-3

- Universal Dynamic List Subsets, page 1-3

- Interaction Multiple Dialing Modes, page 1-4

- 'Do Not Call' List Filtering, page 1-4

- Calling Calendar and Time Zone Management, page 1-4

- Real-Time Performance Statistics, page 1-5

Record Release Strategies and Controls

Oracle Advanced Outbound Telephony provides a number of dynamic release strategies and controls allowing call center manager to tactically optimize the execution of the calling list.

Interaction center managers have the capability to prioritize their objectives. Deciding the order in which a list segment is to release records can be controlled by list *priority* control. Interaction center managers may specify either sequential exhaustion of records from a particular list segment, or round robin the selection records from of list segments or a combination of both. Used in conjunction with a *distribution* release strategy at the

campaign activity level and a *quantum* release strategy at the subset level to control the number of records pulled for release.

For some outbound efforts a list may be segmented based on geographic regions. In business scenarios such as surveys or appointment scheduling, the desired goal may be to evenly distribute successful contacts among the lists. Oracle Advanced Outbound Telephony *quota* release strategy can manage the release of records toward a goal, then block any further release of records once the quota has been met for that particular list segment, thus allowing the calling efforts to be focused on other areas needing attention.

Interaction centers are very dynamic and administrators need tools that allow them to adjust their tactics in a real-time manner. Outbound dialing strategies may need to filter out records from a certain geographical area or need to focus on calling segment that is yielding better results due to time constraints. Oracle Advanced Outbound Telephony's *record filter* controls allows administrators to dynamically modify the release criteria of records for a given campaign activity, thus controlling the types of records that are called.

Oracle Intelligent Recycling Strategies

Oracle Advanced Outbound Telephony recycling strategies (callback) defines the decision and action process after each call attempt. Recycling strategies may determine "best time to call" or determine that further efforts should be halted due to diminishing returns. The recycling decision, based on user definable business rules, may test a combination of data points to determine an appropriate course of action. The data point test may include: call outcome (ring-no-answer, busy, answering machine, SIT (special information tones, etc.), phone number type (home, work, etc.), time/date/day, outcome counters from previous call attempts on the record, or a field in the call record.

Recycling actions may include: schedule a callback at a specified time, retire the record from further call attempts, change phone number for next dial attempt, or move the record to another list.

Universal Dynamic List Subsets

Oracle Advanced Outbound Telephony provides the ability to dynamically *subset* (segment) the calling list based on any value(s) within the customer record (customer score, address, etc.) and then control the release of the records at a subset level. In other words, set priorities between the subset, set quotas on subsets, and define the number of records to be release from each subset.

Subsets allow the partitioning of records to align to business objectives and enable interaction center administrators with more control granularity to focus calling efforts. If the calling efforts are not meeting business objectives, simply redefining the subset(s) will quickly and easily change the execution strategy.

Interaction Multiple Dialing Modes

Oracle Advanced Outbound Telephony provides several dialing modes options that maps to a desired level of agent productivity, campaign complexity and campaign execution cycle.

Manual mode offers the full list contact management functionality offered by Oracle Advanced Outbound Telephony, in an environment that is not CTI-enabled.

Preview mode offers an agent screen pop where the agent must initiate the dial via Oracle Telephony Manager's softphone.

Timed Preview mode delivers a record (screen pop) to the business application, and waits for a predefined time period before Oracle Advanced Outbound Telephony launches the dialing of the record. The agent can initiate the call before the predefined time period expires, or the agent can allow the time period to expire and have Oracle Advanced Outbound Telephony automatically initiate the dial.

Progressive mode offers simultaneous automated dialing with an agent screen pop.

'Do Not Call' List Filtering

Oracle Advanced Outbound Telephony manages 'Do Not Call' records through Oracle's Trading Community Architecture (TCA). The architecture provides a fully coordinated effort across the e-Business application suite for controlling contact restrictions for all contact media (e-mail, phone, postal mail etc.). The architecture specifies contact control based on execution channel (telephony, e-mail, etc.), time periods for applying the restriction(s), and purpose (telemarketing, collections, etc.) for a phone number. Before any record is eligible for calling, Oracle Advanced Outbound Telephony validates the record against TCA for any real-time updates, thus facilitating compliance with the federal Telephone Consumer Protection Act (TCPA) legislation.

However, the first filtering process should take place within Oracle Marketing in the form of a suppression list. By creating a suppression list that identifies call records flagged as Do Not Call within TCA, you can effectively eliminate these records before generating your calling list. For more information on suppression lists, refer to the *Oracle Marketing User Guide*.

Calling Calendar and Time Zone Management

A key component to contact management is identifying the most appropriate time to contact an individual. Calling calendars used in conjunction with time zone information, define a set of callable times.

Country and regional calendars support compliance with geographical restrictions where violations of call time restrictions can have legal consequences.

User defined calendars provide the flexibility to define arbitrary callable times to reflect the demographic makeup of a campaign activity or a calling list.

Real-Time Performance Statistics

Oracle Advanced Outbound Telephony's real-time performance reports provide administrators feedback on the operations of the calling efforts, thus enabling them the information to adjust execution directions. The reports included with Oracle Advanced Outbound Telephony are:

- **Record Summary Statistics Report -** report provides a quick view of the record distribution for all active call-center campaigns. Record statistics include counts of records loaded, called, remaining, available, and unavailable.

- **Campaign Activity Record Detail Statistics Report -** report provides a detailed view of the record distribution for a campaign. Similar to the *Campaign Activity Record Summary Statistics* report, this report provides analogous data, however drills down at a list and subset level. The report also compares calls achieved to quota objectives.

- **Campaign Activity Dialing StatisticsReport-** report helps in evaluating a calling effort. The report incorporates data for a specified period, where the maximum window is 24 hours. Data shown consist of counts and percentages for the period, including dialing outcomes (busies, ring-no-answers, SIT, etc.), and general distribution of calls in the various dialing modes.

- **Campaign Activity Outcome Summary Report-** report provides a view of the distribution of call outcomes and results for a campaign. The report incorporates data for a specified period, the maximum window being 24 hours.

- **Campaign Activity Call Results Detail Report -** report is similar to the Campaign Activity Outcome Summary report, providing analogous data, however drills down at a list and subset level. Again, the report shows data for a specified period, the maximum window being 24 hours.

- **Agent Call Results Detail Report -**report provides a view of the distribution of call results among agents for a campaign. Statistical data for the report incorporates data for a specified period, the maximum window being 24 hours

- **Agent Performance -** report provides a view of talk times, wait times, wrap times, and idle times among agents for a campaign. The report provides a means of comparing longest times, shortest times, and average times with an agent's actual times. Once more, the report shows data for a specified period, the maximum window being 24 hours.

- **Campaign Activity Time Zone Detail -** report provides for all active campaigns, a quick glance view of the distribution of callable records broken down by time zone. Statistics are available at a list level and are aggregated to the Campaign Activity level.

New in This Release

There are no new features added to Oracle Advanced Outbound Telephony for this release.

2

Dependencies and Integration Points

This chapter covers the following topics:

- Architecture
- Oracle Advanced Outbound Telephony Physical Architecture
- Oracle Advanced Outbound Telephony Servers
- Oracle Marketing Integration
- Responsibilities
- Concepts

Architecture

This topic group provides information on the servers that comprise Oracle Advanced Outbound Telephony, its other components, how they are configured to work together, how they integrate with Oracle Marketing, the minimum software and hardware requirements, and sizing parameters for Oracle Advanced Outbound Telephony.

This topic group covers the following topics:

- Oracle Advanced Outbound Telephony Physical Architecture, page 2-1
- Oracle Advanced Outbound Telephony Servers, page 2-4
- Oracle Marketing Integration, page 2-11

Oracle Advanced Outbound Telephony Physical Architecture

The Oracle Advanced Outbound Telephony product consists of three main components:

1. **Schema -** Oracle Advanced Outbound Telephony has schema objects (primarily tables and views), PL/SQL packages. The Oracle Advanced Outbound Telephony

schema stores:

- Customer records for Advance Outbound campaigns

- Call history

- Recycling algorithms

- Record filters

- Subset information

2. **Administration GUIs -** Oracle Advanced Outbound Telephony has a set of administration user interfaces to perform the following tasks:

- Campaign call center parameter setup

- Campaign Activity call center parameter setup

- Subset creation and maintenance

- Record Filter creation and maintenance

- Recycling creation and maintenance

- Real time reporting

3. **Java servers -** Oracle Advanced Outbound Telephony has two Java server processes:

- Oracle Advanced Outbound Telephony Central Server

- Oracle Advanced Outbound Telephony Dial Server

    These servers are discussed in greater detail in the Oracle Advanced Outbound Telephony Servers, page 2-4 topic.

Oracle Advanced Outbound Telephony Architecture Diagram

The following diagram shows the Oracle Advanced Outbound Telephony components in the context of a complete system. Components which are actually part of the Oracle Advanced Outbound Telephony product are highlighted in gray.
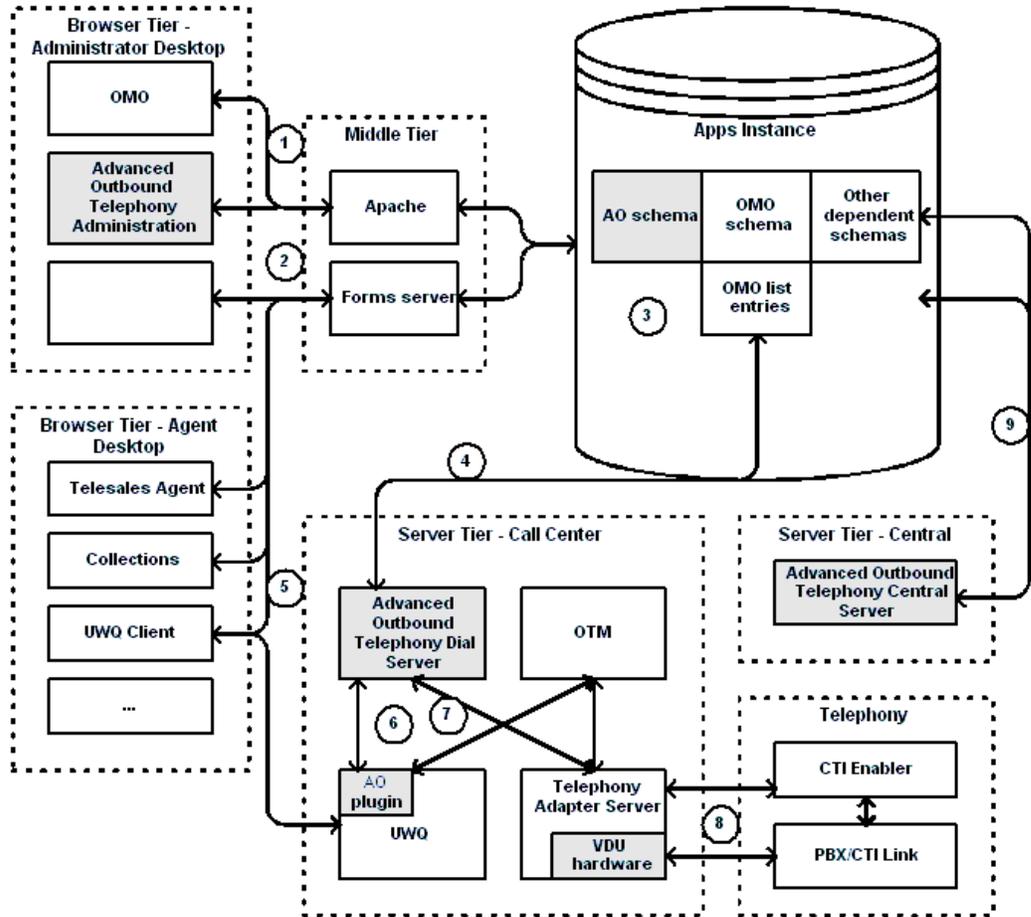
Numbered areas on the physical architecture diagram are explained below.

1. The Oracle Advanced Outbound Telephony administration GUI is on the HTML stack. It uses the Advanced Outbound Administrator responsibility and it is part of the Oracle Advanced Outbound Telephony product.

2. To implement and administer other dependent components, other screens in both the HTML and Forms interfaces will be required. Examples of responsibilities used in Forms are 'Telesales Administrator' and 'CRM Administrator.'

3. Much of the Oracle Advanced Outbound Telephony functionality and integration happens through database schemas. There is an Oracle Advanced Outbound Telephony schema present in the Apps Instance and it is part of the Oracle Advanced Outbound Telephony product. Oracle Advanced Outbound Telephony is directly dependent on the schemas of the following:

   • Oracle Marketing (AMS) - Oracle Marketing

   • TCA (HZ) - Trading Community Architecture

- JTA - Oracle Foundation

- JTT - Oracle Foundation

- IEO - Server schema and Logger

4. The Oracle Advanced Outbound Telephony Dial Server removes records from the database and returns these records through the return queue. This process is described in more detail in the Oracle Advanced Outbound Telephony Dial Server, page 2-7 topic.

5. The agent desktop applications, such as UWQ, Telesales, and Collections, are primarily Forms applications. All desktop applications integrate to Oracle Advanced Outbound Telephony through UWQ.

6. Oracle Advanced Outbound Telephony integrates into UWQ through the Media Provider interface. An Advanced Outbound Telephony plugin exists in UWQ and is considered part of the Oracle Advanced Outbound Telephony product.

7. The Oracle Advanced Outbound Telephony Dial Server uses the Telephony Adapter Server for CTI control.

8. The Oracle Advanced Outbound Telephony Central Server is a lightweight server which does time zone and calendar management. Notice from the diagram that the two Oracle Advanced Outbound Telephony servers do not communicate directly. The Oracle Advanced Outbound Telephony Central Server is part of the Oracle Advanced Outbound Telephony product.

Oracle Advanced Outbound Telephony Servers

This topic group discusses the responsibilities and architecture of the Oracle Advanced Outbound Telephony servers in greater detail, including:

The Oracle Advanced Outbound Telephony Central Server, page 2-4

The Oracle Advanced Outbound Telephony Dial Server, page 2-7

The Oracle Advanced Outbound Telephony Central Server

The Oracle Advanced Outbound Telephony Central Server is responsible for invoking the operations of Oracle Advanced Outbound Telephony that take place in the database. The Central Server does the following things:

- Changes the status of campaign activities and lists when necessary.

  - Periodically calculates callable time matrices based on time zone, country code, list and campaign activity information.

- Validates list entries.

- Executes recycling, which also populates call history and Oracle Customer Interaction History when necessary.

- Recognizes lost list entries (those taken by applications but never returned) and makes them available again.

- Rolls up reporting data.

The Central Server has the following design characteristics:

- Because most of its functionality is implemented in the database, it is very lightweight.
  - Its tasks are broken up into plugins. A basic understanding of this is helpful for understanding the Central Server's configuration.

The Central Server uses the Oracle Interaction Center Server Manager (ICSM) interface for configuration, for more information on ICSM please refer to the *Oracle Interaction Center Server Manager*. A Central Server, as its name implies, exists once per instance. One Central Server performs all of the above tasks for all active campaign activities and lists.

The following diagram depicts the Oracle Advanced Outbound Telephony Central Server, its responsibilities and it's relation to the database:
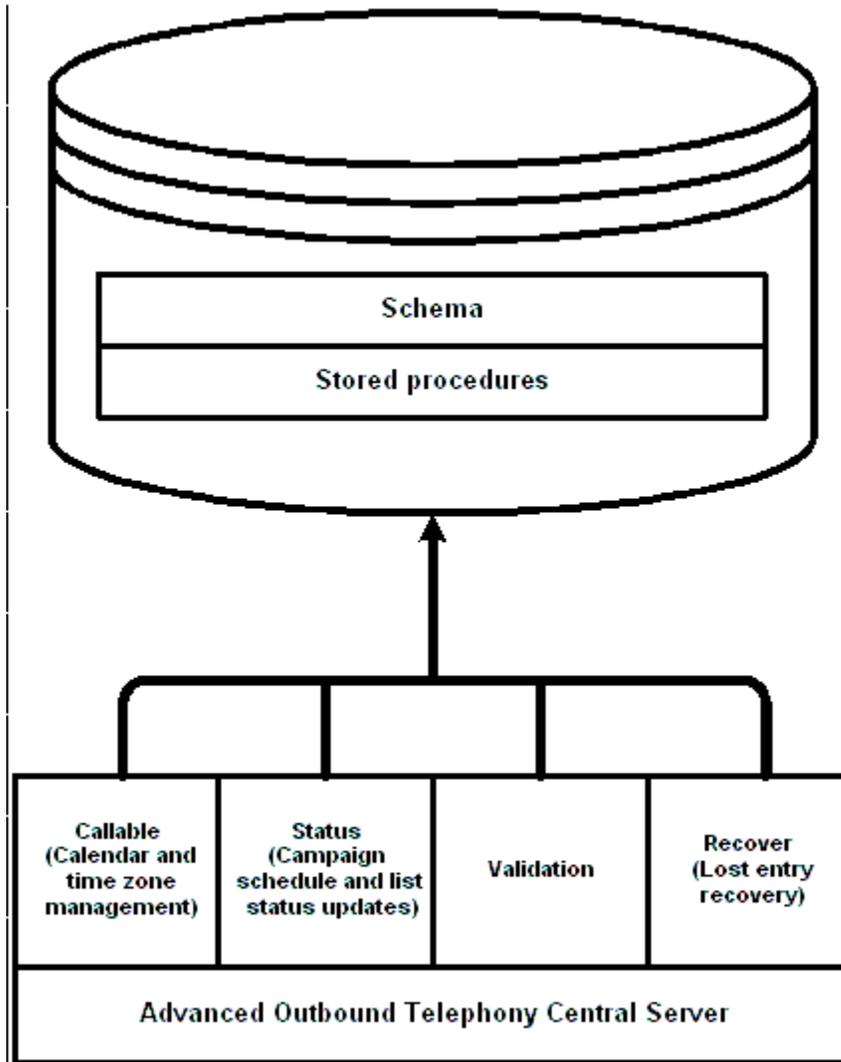
The above diagram depicts the CRM instance and the Oracle Advanced Outbound Telephony Central Server. The Advanced Outbound Telephony Central Server is responsible for invoking the following procedures or "tasks":

- Calendar and time zone management

- Group callback management

- Campaign activity and list status updates

- Validation

- Reporting

- Lost entry recovery

These procedures or "tasks" are plugins and exist as stored procedures in the schema on the CRM instance.

The Oracle Advanced Outbound Telephony Dial Server

The Oracle Advanced Outbound Telephony Dial Server is responsible for the following functional areas:

- Managing agent logins and agent state (via UWQ)

- Retrieving records from the database

- Delivering records through UWQ to desktop applications

- Receiving record status data via UWQ from desktop applications

- Recycle records based on return status and recycle algorithms

The following diagram depicts the Oracle Advanced Outbound Telephony Dial Server, its responsibilities and it's relation to the database:
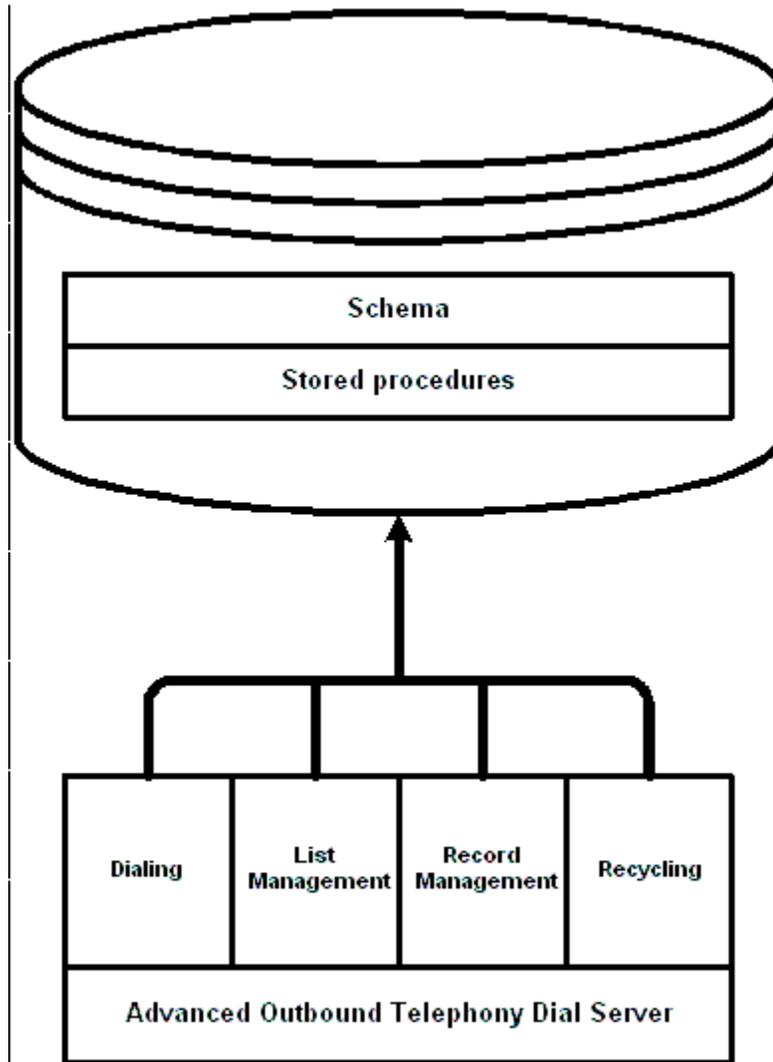
Unlike the Central Server, which resides alone in its own server group, Dial Servers belong to server groups in a similar manner to the other Interaction Center servers. For scalability purposes, multiple Dial Servers can be added to a single server group. Each Dial Server can support a large call center. When multiple Dial Servers are used, the Oracle Advanced Outbound Telephony UWQ Media Provider Plugin will automatically choose between them based on availability and load.

The following diagram provides a simple example layout of the Oracle Advanced Outbound Telephony servers, and illustrates the concept behind using server groups to set up distributed call centers:
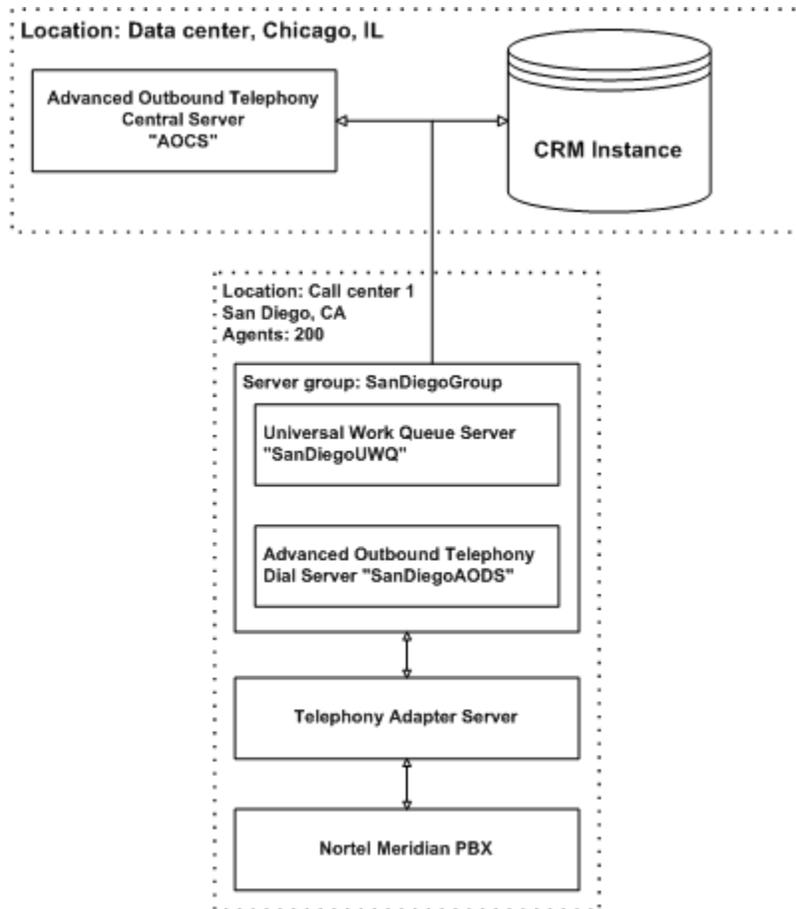
The above diagram shows two interaction centers: one data center and one call center. The data center, which is located in Chicago, houses the CRM database instance and the Oracle Advanced Outbound Telephony Central Server. The call center, which is located in San Diego and has 200 agents, houses 1 instance of the Oracle Advanced Outbound Telephony Dial Server (SanDiegoAdvanced Outbound TelephonyDS). In this example, the call center in San Diego uses a Nortel Meridian PBX.

The following diagram provides a complex example layout of the Oracle Advanced Outbound Telephony servers, and illustrates the concept behind using server groups to set up distributed call centers:
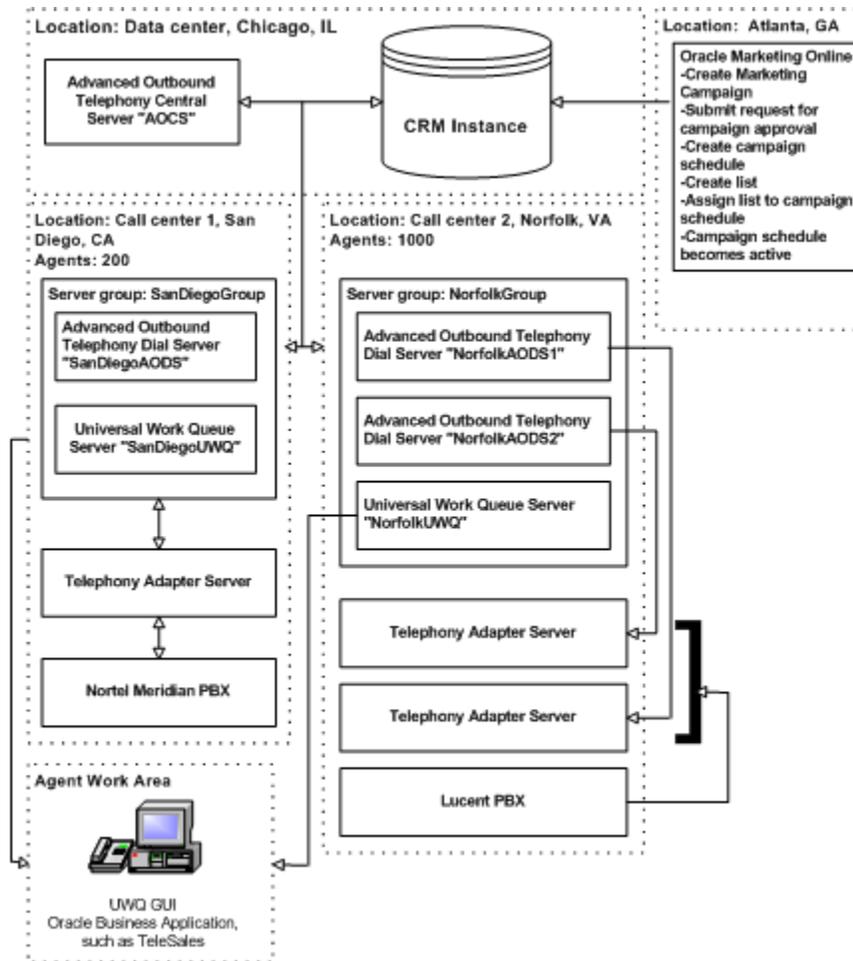
The above diagram shows three interaction centers: one data center, two call centers, an agent work area, and a marketing center. The data center, which is located in Chicago, houses the CRM database instance and the Oracle Advanced Outbound Telephony Central Server. Call Center 1, which is located in San Diego and has 200 agents, houses 1 instance of the Oracle Advanced Outbound Telephony Dial Server (SanDiegoAdvanced Outbound TelephonyDS). Call center 2, which is located in Norfolk and has 1000 agents, utilizes 2 instances of the Oracle Advanced Outbound Telephony Dial Server (NorfolkAdvanced Outbound TelephonyDS1 and NorfolkAdvanced Outbound TelephonyDS2). In this example, call center 1 in San Diego uses a Nortel Meridian PBX and call center 2 in Norfolk uses a Lucent PBX. The agent work area utilizes the Oracle Universal Work Queue GUI and a business application, such as Oracle TeleSales.

The middleware setup, which defines the Telephony Adapter server and the CTI server, determines which Telephony Adapter server will be pointed to.

Oracle Marketing Integration

Oracle Advanced Outbound Telephony is tightly integrated with and dependent on Oracle Marketing (Oracle Marketing). As such, Oracle Marketing is a prerequisite for Oracle Advanced Outbound Telephony. Integration with Oracle Marketing deals primarily with sharing schema objects such as:

List Integration, page 2-11

Campaign Activities, page 2-12

List Entries, page 2-12

List Integration

List integration with Oracle Marketing is based around a shared state model. In some states (or statuses), Oracle Marketing owns a list and its state transitions. In some states, Oracle Advanced Outbound Telephony owns the list and its state transitions.

The following diagram shows the state transition model for lists (the list states and transitions shown in shaded area are owned by Oracle Advanced Outbound Telephony):
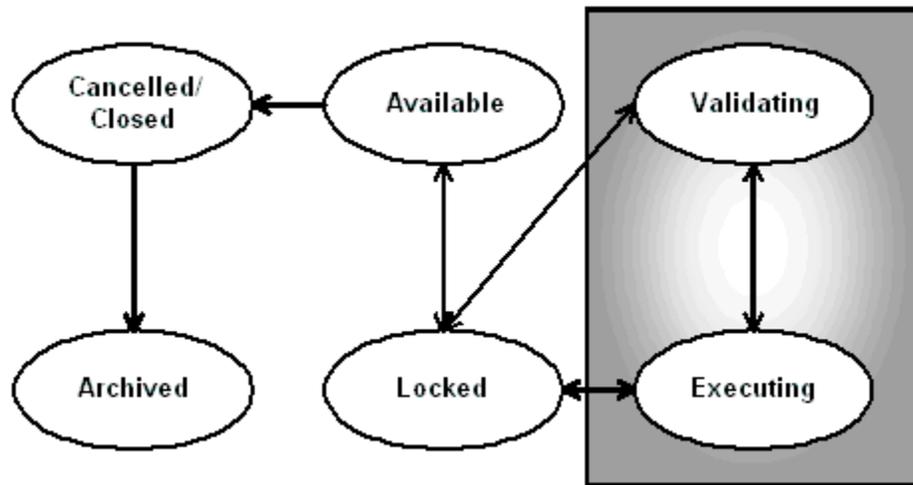
The above diagram depicts the various list state transitions. Only the validating and executing list states are owned by Oracle Advanced Outbound Telephony.

The list state begins as "locked", where it can be cancelled/closed or begin the validating process. If it is cancelled/closed, it will be archived. If it begins the validating process, it will be validated, and begin the executing process (all within Oracle Advanced Outbound Telephony). Once the execution process has completed, it will be set back to "locked".

Definitions of these states, as well as the key transition states, are as follows:

- Locked (Oracle Marketing). The list is manually placed into this state using the Oracle Marketing interface when no more changes will be made to it. Up to this point, it can be regenerated at will.

- Validating (Advanced Outbound Telephony). This is a manual process you can run or schedule to be run via the Oracle Advanced Outbound Telephony HTML Administration console.

  At this point, they are validated, which is a relatively long-running process that checks each entry's phone numbers, country codes, and time zone information.

- Executing (Advanced Outbound Telephony). This is a manual process you can run via the Oracle Advanced Outbound Telephony HTML Administration console.

- Closed (Oracle Marketing). Lists are moved to closed when the campaign activity end date passes.

Records will only be released from lists which are in the **executing** state, and also have **active** activities.

Campaign Activities

Similar to lists, the sharing of campaign activities is based around a state model. However, the campaign activity integration is simpler.

The following conditions must be true for Oracle Advanced Outbound Telephony to use a campaign activity from Oracle Marketing (and display it in the IEC Admin GUI):

- The activity is set to 'Telemarketing.'

The following additional conditions must be true for Oracle Advanced Outbound Telephony to release records from lists within a campaign activity:

- The campaign activity's status code is active.

List Entries

Similar to lists, the sharing of campaign activities is based around a state model. However, the campaign activity integration is simpler.

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- The campaign activity's status code is active.

Responsibilities

The following table shows the responsibilities needed for implementing, administering, and using Oracle Advanced Outbound Telephony use:

Responsibility Name	Who Uses it	Responsibility Description
Call Center HTML Administration	Oracle Advanced Outbound Telephony Administrators	Manage multiple aspects of interaction center, including: ICSM, and UWQ Media Actions.
Audience SuperUser and Campaign WorkBench SuperUser	Oracle Advanced Outbound Telephony Administrators	Manage Oracle Marketing operations.
Sales Online Super User	Oracle Advanced Outbound Telephony Administrators	Associate agents or resource groups to campaign activities.
Advanced Outbound Administrator	Oracle Advanced Outbound Telephony Administrators	Manage Oracle Advanced Outbound Telephony operations.
Advanced Outbound Performance Monitor	Oracle Advanced Outbound Telephony Administrators	Monitor Call Center Performance.
Interaction History JSP Admin	Oracle Advanced Outbound Telephony Administrators	Create outcome, result, and reason codes, and their pairings.
Oracle Marketing Administrator	Oracle Advanced Outbound Telephony Administrators	Create custom target group priority levels.
TeleSales Agent	Oracle Advanced Outbound Telephony Agents	Allows agent level access to Oracle TeleSales.
Collections Agent	Oracle Advanced Outbound Telephony Agents	Allows agent level access to Oracle AdvancedCollections.

Related Topics:

- New in This Release, page 1-6

- Features, page 1-2

- Architecture, page 2-1

- Concepts, page 2-14

Concepts

Appending Campaign Activities

Oracle Advanced Outbound Telephony allows you to append new records to an existing campaign activity by creating a new campaign activity and appending it to an existing campaign activity. This process allows you to dynamically add new records to a campaign activity, or, in other words, add records to a campaign activity while records from that campaign activity are being dialed.

While the copy process overwrites all records with PARTY_IDs that already appear in the destination campaign activity, the call history for the records is maintained. This process prevents the duplication of records in the destination campaign activity once the append process has been completed. Also, by overwriting the information for the record in the destination campaign activity, the move process ensures the record is not marked as Do Not Use.

To successfully perform the append campaign activity process, a destination campaign activity must be present and you must have already created the new campaign activity containing the list information you want to append to the destination campaign activity. The campaign activity must be validated at least once. As well, the status for both the source and the destination campaign activities must be either "Locked" or "Executing", and the campaign activities must be Call Center Ready.

Area Code Mapping

Also known as Region Mapping.

An area code is a telephone numbering plan within a country that allows subscribers to make and receive telephone calls across long distances, such as the 3 digit area code used in US and Canada.

Area Code Mapping provides a way for Oracle Advanced Outbound Telephony to find the country to associate a phone number with.

The Trading Community Architecture (TCA) seeds area code mappings for the US (United States) and CA (Canada). However, if you are processing campaign activities containing numbers in other countries (whose phone country code does not map uniquely to a territory code), you will need to create the area code mappings for those countries. If your campaign activity contains numbers in only one country, you can create rules defining the area code for the entire campaign activity, and do not need to create these mappings. Additionally, these mappings are used to associate regions (states/provinces) with area codes so that regions can be associated with contact points and used in applying Region Calendars to determine when contact points can be called.

Calling Calendars

A calling calendar defines a set of callable times. Calendars can be associated to geographic locations (countries or regions) or marketing objects (campaign activities). Oracle Advanced Outbound Telephony utilizes three types of calendars:

- Country Calendar

- Region Calendars

- User Defined Calendar

Country Calendar (Mandatory)

A country calendar consists of a baseline callable time range for all seven days of the week, as well as any exceptions. Exceptions are most commonly used for holidays, and may be specified by specific date or by pattern (for example, third Friday of each month).

Country calendars MUST be defined, otherwise the records in the campaign activity will not be called.

Country calendars are expected to be created based on country-specific laws and are required for Oracle Advanced Outbound Telephony. There may be cases where it is acceptable to call contact points outside of the range of these laws, user defined calendars allow you to do this.

Every list entry has one to many contact points. Every contact point (telephone number) must have an associated country code and time zone. Every country code must have an associated calendar. This association creates the base set of callable times for every list entry. Oracle Advanced Outbound Telephony ships with country codes for many countries; however, additional country codes can be created and added to the base product as necessary to meet your business needs.

Region Calendar (Optional)

Region calendars can be used to solve the problem of when certain regions further restrict the callable times from the country they are in. For example, the United States sets the callable time parameters at 9am through 9pm; however, certain states further restrict those hours. These restrictions necessitate the creation of a regional calendar to address the more limited callable hours.

If there are conflicts between the regional calendar and the corresponding country calendar, the country calendar prevails (except when you select **Yes** from the drop-down list in the Override Country Calendar field).

User Defined Calendar (Optional)

User defined calendars are optional calendars which can be associated with campaign activities. These calendars are used to supplement information in the country calendar. If there are conflicts between the user defined calendar and the corresponding country

calendar, the country calendar prevails (except when you select **Yes** from the drop-down list in the Override Country Calendar field).

For example, the default calling time in the country calendar you are using is 9AM to 9PM; however, you are only calling businesses and you know that nobody will be present after 6PM. You can create a user defined calendar that adjusts the call time accordingly.

Calendar Example:

Oracle Advanced Outbound Telephony ships with a default U.S. calendar. It contains the following baseline callable ranges:

Sunday 10AM-8PM

Monday 9AM-9PM

Tuesday 9AM-9PM

Wednesday 9AM-9PM

Thursday 9AM-9PM

Friday 9AM-9PM

Saturday 9AM-8PM

In addition, it contains restricted calling hours for the standard U.S holidays. Note that the callable times are always specified in terms of the local time zone; no time zone specification is necessary. If you wish to prevent calling on a specific target group from 6PM to 8PM on a specific date (for example, Monday, June 4, 2001), you can create an user defined calendar with the following exception information:

06-04-2001 6PM-8PM: no calling

and apply it to the target group.

Campaigns

A campaign is the organizational unit of a focused marketing effort. Campaigns define the marketing effort. One marketing campaign can have multiple campaign activities associated with it and each of these campaign activities can be targeted for different execution channels. For example, a marketing campaign might have a campaign activity associated with it that is targeted for e-mail execution, and another associated with it that is targeted for telephony execution.

Campaign Activities

Campaign activities are specified within Oracle Marketing (by a user with the Oracle Marketing Campaign WorkBench SuperUser responsibility).

Campaign activities support multiple channels of execution within a marketing campaign. A campaign activity is the highest-level object associated with Oracle Advanced Outbound Telephony. Target groups are associated to campaign activities, as

are agents. A campaign activity has a start date and an end date. Multiple campaign activities can be associated to one marketing campaign, where the campaign activity is managed as a different execution channel.

The release strategy is executed at the campaign activity level. When the campaign activity is created in Oracle Marketing, the interaction center administrator designated for campaign activity approval (via the Marketing Medium specification) will receive notification. The administrator must approve the campaign activity before it can be executed. This approval process takes place in the Interaction Center Administrators's Personal Homepage, where the workflow item must be approved.

> **Note:** The configuration of campaign activities takes place both within Oracle Marketing and within the Oracle Advanced Outbound Telephony administration application.

Oracle Advanced Outbound Telephony only deals with the target groups targeted for outbound telephony execution. In order for Oracle Advanced Outbound Telephony to be able to use a campaign activity from Oracle Marketing, the following conditions must be met in Oracle Marketing:

- The activity must be set to "Telemarketing". This is typically defined as part of the campaign activity setup type (in the 'Administration' tab for the Oracle Marketing Audience SuperUserresponsibility in HTML applications).

- The campaign activity's status code must be set to "active". This is set in the 'Administration' tab for the Oracle Marketing Audience SuperUser responsibility in HTML applications.

Dialing Methods

A dialing method is the mode by which the system dials the customer telephone numbers as it passes the records to the agents. Automated dialing enhances productivity and list penetration because it dials the customer telephone numbers with a reduced chance for error.

Each campaign activity can have a different dialing method. Oracle Advanced Outbound Telephony allows you to set up different campaign activities and lists with different dialing methods. Within a single campaign activity, different lists can also have different dialing methods. While dialing methods can be set at both the campaign activity and list level, lists are set by default to use the dialing method of the parent campaign activity. However, this default can be overridden at any time.

Oracle Advanced Outbound Telephony supports the following dialing methods:

- **Preview** - In preview dialing, the list entry information is delivered to the agent-facing application. It is up to the application to initiate the dial programmatically, or for the agent to initiate the dial using the softphone.

- **Timed Preview** - When timed preview is used, a record (screen pop) is delivered to the business application, and Oracle Advanced Outbound Telephony waits for a predefined time period before dialing the record. The agent can initiate the call before the predefined time period expires, or the agent can allow the time period to expire and have Oracle Advanced Outbound Telephony automatically initiate the dial.

- **Progressive** - When progressive dialing is used, Oracle Advanced Outbound Telephony delivers the list entry information to the desktop application and simultaneously places the dial from the agent's telephone. In the case of a non-connect outcome, it is up to the agent to classify the call.

- **Manual** - With manual dialing, there is no CTI; therefore, the agent dials the call by hand.

Do Not Call (DNC)

Also known as a "Stop List".

In compliance with the Telephone Consumer Protection Act (TCPA), at the request of the call recipient, calls can be blocked so that they will not be dialed by Oracle Advanced Outbound Telephony or any other application.

Oracle Advanced Outbound Telephony manages 'Do Not Call' records through Oracle's Trading Community Architecture (TCA). The architecture provides a fully coordinated effort across the e-Business application suite for controlling contact restrictions for all contact media (Email, phone, postal mail etc.). The architecture specifies contact control based on execution channel (telephony, Email, etc.), time periods for applying the restriction(s), and purpose (telemarketing, collections, etc.) for a phone number.

Before any record is eligible for calling, at runtime Oracle Advanced Outbound Telephony will validate the record against TCA for any real-time updates where the channel equals "phone," or "all;" thus, facilitating compliance with the federal Telephone Consumer Protection Act (TCPA) legislation.

The first filtering effort should be made within Oracle Marketing through the creation of a suppression list. Before list generation, a suppression list should be defined which identifies if list entries have been flagged within TCA not to be called.

Oracle TeleSales is used to add numbers to the Do Not Call list. Please refer to the Oracle TeleSales documentation for more information on requesting numbers be added to the Do Not Call list.

Importing Lists

The importing of target groups from various sources is an important part of using Oracle Advanced Outbound Telephony. Target groups may be sourced internally, from the Trading Community Architecture database (TCA) or externally either through target group import or by use of Oracle Discoverer. Interaction centers and marketing

organizations frequently purchase lists of contacts. This functionality is entirely owned by Oracle Marketing.

Oracle Marketing also allows for the regeneration of existing lists.

List Entries

A list entry is one row in a list. It is occasionally called a record. Currently, each list entry is associated with one party and has one to many contact points. The fields on each list entry are always the same within one list. They are determined by the list source type, which is associated with the list header.

List entries a re created when Oracle Marketing generates a list. They contain all necessary denormalized data from other areas of the database with the exception of Do Not Call information.

Oracle Advanced Outbound Telephony uses the list entry as the primary, permanent storage area for the record.

List Generation

When you generate a list, customer records satisfying the list conditions are populated in the list. A list can only be generated after all the conditions have been specified. The amount of time it takes to generate a list depends on several factors such as the size of the database and the system environment condition at the time a list is being generated.

List Generation Types

There are three Generation Type options:

- **Full Refresh:** Choosing this option will result in a new list, if the list is generated for the first time, or remove all previous entries and replace with new entries if the list has previously been generated. If you regenerate a list after adding manual entries to it using the Full Refresh option, you will lose the manual entries and may have to add them again.

- **Append New Records:** In this mode of list generation, all the list entries and information about those entries from the previous generation will be retained. New entries that meet the specified selection criteria will be added to the existing list. Using this generation type could result in the list entries and information about those entries not matching the selection criteria completely.

- **Update Attributes Only:** In this mode of list generation, if any modifications are made to the customer attributes in the corresponding data source or Audience, those changes are updated within the list entry records. For example, if the Audience is Organization Contacts and changes are made to the customer attributes in the Oracle Customer Model (TCA), the latest information about the entries will also be updated in the list. Using this generation type could result in the list entries and information about those entries not matching the selection criteria completely.

Lists

A list is a data structure containing information about one or more customer records. A list does not reproduce the customer database; each record in the list points back to a real customer account in one of your customer databases. More specifically, each record in the list only reflects the subset of fields needed for a screen pop and to meet the list segmentation criteria.

The purpose of a list is to identify a particular segment of customer records. Once a segment has been identified, an administrator can control the conditions under which the records are called.

The term 'list' is also used to mean a specific group of list entries. As mentioned above, lists can be used with Oracle Advanced Outbound Telephony by associating them with the correct type of campaign activity. Lists are owned by Oracle Marketing and are used for many purposes within marketing aside from outbound dialing.

Although different aspects of list headers are configurable from different GUI screens in Oracle Advanced Outbound Telephony, the list header structures are the same.

List Regeneration

Oracle Marketing has the ability regenerate the target groups (e.g. Oracle Advanced Outbound Telephony calling list) with new data. Calling record updates may also include new or changed phone numbers, in which case Oracle Advanced Outbound Telephony must revalidate the data. The list regeneration process will not disturb any call history information of records that have already been called.

Campaign activities (e.g. target groups/calling lists) may have execution duration of weeks where the calling record may become outdated. If the updated information has an impact on record release control or has different phone numbers, then call center administrators need the ability to insert/delete/update records to a calling list.

An example may be a collections campaign effort where delinquency time and amount may change since the creation of the calling list. Different strategies or priority are used based on this information. The list may be segmented based on amount of duration of delinquency (e.g. 30, 60 or 90 days) where the highest priority may be given to records that are the most overdue and/or above a threshold amount. By regenerating the list, the record will be categorized appropriate for dialing.

List regeneration options offered by Oracle Marketing that Oracle Advanced Outbound Telephony can handle include:

- **Standard** - this target group regeneration mode will not keep any call history and should only be used as the first time effort to generate a calling list. Subsequent list regenerations should not use this target group generation mode once Oracle Advanced Outbound Telephony has begun execution.

- **Incremental** - this target group regeneration mode should be used to insert

additional calling records without disturbing the call history information of existing records in the target group. It will not update any data to the existing records in the target group.

- **Update** - this target group regeneration mode should be used to reflect changes such as the addition of new records, data changes to existing records and/or removal of existing records from the target group. Regeneration will not disturb existing call history information for records that remain in the list.

- **Update No Purge** - this target group regeneration mode is similar to the Update mode, however will not delete any records from the existing target group.

List Source Types

Also referred to as Data Sources. A list source type is a concept used by Oracle Marketing to define how fields from the database (typically TCA) map to the columns of a target group entry. A target group entry has several hundred generic columns; a specific list source type, for example, could state that the phone number will go into column 1 and the name will go into column 2. However, a different list source type could populate the first column with name and the second column with phone number.

Oracle Advanced Outbound Telephony recycling algorithms and record filters are directly associated to source types because they define which fields are present in a target group.

Oracle Marketing ships with two default list source types:

- B to B - Business to Business (Organization Contacts)

- B to C - Business to Consumer (Persons)

> **Note:** While Oracle Marketing allows you to modify the source type fields, you MUST NOT remove or modify the following fields:

> **Note: Per Customer** - Oracle Advanced Outbound Telephony requires these fields for each customer. They are either used in the screen pop, or to check for DNC, release control, or the stop list.

> **Caution:** While Oracle Marketing allows you to modify the source type fields, you MUST NOT remove or modify the following fields: Per Customer - Oracle Advanced Outbound Telephony requires these fields for each customer. They are either used in the screen pop, or to check for DNC, release control, or the stop list.

- PERSON_FIRST_NAME

- PERSON_LAST_NAME

- PERSON_NAME_SUFFIX

- PERSON_TITLE

- PIN_CODE

- PARTY_NAME

- PARTY_ID

- SOURCE_CODE

- SOURCE_CODE_FOR_ID

- PARTY_SITE_ID

- POSTAL_CODE

Note: Per Phone Number - Oracle Advanced Outbound Telephony requires these fields for each phone number.

- CONTACT_POINT_ID

- TIME_ZONE

- PHONE_COUNTRY_CODE

- PHONE_AREA_CODE

- PHONE_LINE_TYPE

- PHONE_NUMBER

- RAW_PHONE_NUMBER

- REASON_CODE

Outcome, Result, Reason Codes, and Wrapups

Customer Interaction History provides a three-tiered hierarchical means of recording the conclusion of an interaction: OUTCOME, RESULT and REASON. During the interaction wrap up process, contact center agents may conclude an interaction or activity by assigning one, two or all three of the conclusion descriptors. Outcome,

result, and reason codes specify what happened on a dial attempt to contact a customer. These codes are seeded, but are also user-extensible.

A wrapup relates outcomes to results and reasons. You can limit the availability of a wrapup to a specific campaign type or code. When the wrapup is selected for an interaction, the outcome, result, and reason in the wrapup definition are assigned to the interaction.

Outcome, results and reasons codes should always be enforced as a hierarchy. That is, the user must always select an outcome before you can select a result and they must select a result before they can select a reason.

If an outcome has no results associated with it, then the user should not be allowed to select a result for that outcome. Also, if an outcome/result combination has no reasons associated with it, then the user should not be allowed to select a reason for that outcome/result combination.

If the outcome selected is designated as requiring a result, then the user must select a result. If only one valid result is set-up for the outcome, then that value should be defaulted for the user. If the result selected is designated as requiring a reason, then the user must select a reason. If only one valid reason is set-up for the result, then that value should be defaulted for the user.

Examples
Outcome Selected = "No Answer" or "Busy"

- The result and reason fields remain disabled. The user cannot set them because no result values are associated to these outcome values.

Outcome selected = "Contact"

- The result field is enabled because two possible results can be selected - "No Sale" or "Sale. The user MUST select a result.

Outcome selected = "Contact", Result selected = "No Sale"

- The reason field is enabled because three possible reasons can be selected for a "No Sale" result - "No Money", "Too Expensive", "Out of Work". The User MUST select a reason.

Outcome selected = "Contact", result selected = "Sale"

- The reason field remains disabled. The user cannot set a reason because no reason values are associated to a result of "Sale".

Call Outcome

An outcome describes the outcome of a customer interaction (for example, making contact with the customer or reaching an answering machine). An outcome can be assigned manually by the agent or automatically by the application.

You can required the assignment of a result when a particular outcome is assigned to an interaction. In addition, the assignment of an outcome can generate a callback so that an

agent calls the customer back at another time.

'Outcome' reflects network connectivity (e.g. connect, busy, ring-no-answer, SIT, etc.); a list of system defined outcome codes are defined within Oracle Advanced Outbound Telephony, others may be user defined.

OUTCOME_ID	OUTCOME_CODE	SHORT_DESCRIPTION
1	No Ans	No Answer
2	Busy	Busy
3	Wrong Num	Wrong Number
4	Not Avail	Not Available
5	Bad Pnum	Bad Phone Number
6	Ans Mach	Answering Machine
7	Contact	Contact
8	Decease	Decease
9	Maint	Maintenance
10	Req Proc	Request Processed
11	Bypass	Bypass
12	Change Number	Change Number
13	Delete	Delete
14	Facsimile Tone	Facsimile Tone
15	Incoming	Incoming
16	Invalid for Calling	Invalid for Calling
17	Modem Answer Tone	Modem Answer Tone
18	Not Set Yet	Not Set Yet

OUTCOME_ID	OUTCOME_CODE	SHORT_DESCRIPTION
19	Priority Callback	Priority Callback
20	Requeued	Requeued
21	Withdrawn During Network Time	Withdrawn During Network Time
22	Withdrawn During Ringing	Withdrawn During Ringing
23	FHM Hangup	FHM Hangup
24	FHM Customer Hangup	FHM Customer Hangup
25	Flunked Stoplist	Flunked Stoplist
26	Unknown	Unknown
27	Dialer Error	Dialer Error
28	Discarded	Discarded
29	No ringback	No ringback
30	No dial tone	No dial tone
31	Advanced Outbound Telephony system	Advanced Outbound Telephony system
32	Failed release control	Failed release control

Call Result

A result describes the consequence of an outcome. Examples of 'Results' could include: "Sale" or "No Sale" or "Wrong Party Contact".

Using a wrap up, you can relate an outcome to one or more results (for example, a outcome of "contact" with a result of "no sale"). Also, you can require the assignment of a reason when a particular result is assigned to an interaction.

RESULT_ID	RESULT_CODE	SHORT_DESCRIPTION
1	NoSale	No Sale
2	Sale	Sale
3	Compl	Customer Complaint
4	Cb	Call Back
5	Multi Act	Multiple Activities
6	Completed	Completed Activity
7	Incompleted	Incompleted Activity
8	Sent	Message Sent
9	Not Sent	Message Not Sent
	Failed validation	The record failed to be validated
11	Cache expiration	The record expired in the cache

Call Reason

A reason provides an explanation for the result. 'Reason' codes are optional user/application defined. It is used to further detail the 'Result' of the call, such as "Too Expensive" or "Using Competitor's Product" or "No Interest"

Using a wrap up, you can relate a result to one or more reasons (for example, a contact outcome with a result of "no sale" and a reason of "no money").

REASON_ID	REASON_CODE	SHORT_DESCRIPTION
1	No Money	No Money
2	Already Gave	Already Gave
3	Expense	Too Expensive
4	No Work	Out of Work

REASON_ID	REASON_CODE	SHORT_DESCRIPTION
5	Gave Office	Gave at the Office
6	Other	Other Reason
7	Busy	Too Busy
8	SP Handl Req	Special Handling Required

These codes are owned and administered by Oracle Customer Interaction History. Oracle Advanced Outbound Telephony references these codes in its recycling algorithms and record filters.

Phone Formats

Phone formats must be created for each country that you will be calling in your lists. Oracle Advanced Outbound Telephony ships with the phone formats for the United States and Canada. Additional phone formats can be created by logging into the Oracle Forms Application with the Trading Community Manager responsibility.

Record Release Control

Oracle Advanced Outbound Telephony provides the following means of controlling record release:

- Record Filters

- Release Priority

- Release Strategy

Record Filter

A Record Filter is a set of rules against which the records are checked at the point of release to filter out unwanted dials. Record filters check release fields to ensure they match defined parameters (STATE equal to Virginia). A match here will prevent the release of the record.

The record filter process occurs after a record is selected and provides a last minute means to filter records from being called. If a record does not pass the release checkpoint process, the record will be recycled according to the rules defined for recycling processing.

The release criterion should be defined in an SQL statement where any field(s) available

in AMS_LIST_ENTRIES table may be used as a criterion.

Record filters utilize expressions in a similar manner as recycling algorithms. However, instead of being called conditions, they are called rules. They use the following three components:

- Field

- Operator

- Value

Record filter rules are structured in the following order: *field operator value.* For example: *PERSON_FIRST_NAME equal to James* (where *PERSON_FIRST_NAME* is the field, *equal to* is the operator, and *James* is the value). The combination of these three elements (field, operator, and value) is called an expression.

The Oracle Advanced Outbound Telephony HTML Administration console displays rules in an alphanumeric hierarchy.

Example:

- Rule 1

    PERSON_LAST_NAME begins with W OR PERSON_LAST_NAME begins with B

    AND PERSON_FIRST_NAME equal to James

    OR Rule 2

    PARTY_ID greater than 1200 AND PARTY_ID less than 2500

    OR Rule 3

    CUSTOMER_KEY has a value

In the above example, the lines under each rule are conditions for that rule. You can have multiple expressions in a single condition (as seen under Rule 2) and you can have multiple conditions under a single rule (as seen in Rule 1). If you want to have more than one expression in a condition, or more than one condition in a rule, it is very important how the they are joined together (by AND or by OR).

Separate top level rules are *only* joined together by **OR**; however multiple expressions within a single condition, and multiple sub-conditions within a single rule can be joined by either **AND** or **OR**.

If you want to have multiple top level rules in your record filter, their order is very important. Once a rule is met, Oracle Advanced Outbound Telephony ignores all other rules at the same level and only completes execution for the process within that set of rules. In the above example, if Rule 1 is met, then Rule 2 and Rule 3 are ignored.

Release Priority

Release priorities determine the relative priority of a subset in comparison to other subsets. Oracle Advanced Outbound Telephony utilizes the AMS_list_priority lookup

code for release priority.

Every subset has a release priority. Priorities allow Oracle Advanced Outbound Telephony to distinguish between "high" priority subsets and "low" priority subsets. The priority selections Oracle Advanced Outbound Telephony supports are:

- Highest (1)

- High (25)

- Medium (50)

- Low (75)

- Lowest (100)

Highest through Medium level priorities are preemptive; all subsets with priorities in this range will be exhausted in priority sequence before the next priority level is used. Low and Lowest priorities are used in round-robin fashion; each of these subsets will release its quantum of records, then the next subset in the same priority level will be used.

Oracle often recommends that time-based subsets (for example, the Busy and Priority Callback subsets) have higher priorities, and that all other subsets have lower priorities. This insures that records that need to be called back at specific dates and times are called before those that have no assigned callback dates and times. When Oracle Advanced Outbound Telephony sees that no records are available in the time-based subsets (because they are scheduled for future callback), then it automatically begins the round-robin process among subsets with lower priorities.

Release Strategy

Release strategy is a broad concept which describes how Oracle Advanced Outbound Telephony releases records from lists and subsets. Oracle Advanced Outbound Telephony supports the following types of release strategies:

- Distribution Strategy

- Quantum Release Strategy

- Quota Release Strategy

An additional factor affecting release strategy is priority. Both lists and subsets have priorities which influence release strategy.

Distribution Strategy

When using the distribution release strategy, Oracle Advanced Outbound Telephony pulls an indicated ratio of records from each campaign activity at the same priority level over time. The distribution strategy utilizes distribution priority level and an indicated ratio number (weight), both of which are set in the Oracle Advanced Outbound

Telephony HTML Administration console.

Example: You have campaign activities A and B. Both are set at a distribution priority of "High." Activity A is set to a distribution weight of 10 and Activity B is set to a distribution weight of 20. Over time, a ratio of 10 records will be released from Activity A and 20 will be released from Activity B.

Quantum Release Strategy

The quantum release strategy supports proportional calling across all lists and subsets associated with the campaign strategy and it is considered the baseline strategy for an Oracle Advanced Outbound Telephony service.

The quantum release strategy controls the number of records that can be sequentially dispersed from a subset. This means that when Oracle Advanced Outbound Telephony is distributing customer records to agents, it releases a quantum number of records from each subset before it goes on to the next subset in the campaign.

Every subset has a quantum which you can dynamically adjust via Oracle Advanced Outbound Telephony. Usually, a subset's quantum is adjusted to reflect the proportion of customer records in that subset compared to other subsets in the campaign.

Without the concept of a quantum, Oracle Advanced Outbound Telephony would read all records from one subset before moving on to another subset. This would exhaust each subset in order. While a strategy of this sort may be useful in some instances (for instances, in a Collections application, where you want all of the 60-day overdue customers called before the 30-day customers), you generally want a mix of records from different subsets.

Quota Release Strategy

The Quota Release Strategy stops releasing records from a list or subset when a pre-defined limit has been reached.

This strategy disburses records from a list or subset based on the quota that is assigned to a list or subset. A quota represents the maximum number of records with a certain outcome or result that should be obtained from that list or subset during a pre-defined period of time (set by a Quota Reset Period value).

Quotas are reset at the end of a quota reset period (defined at the list or subset level), so that the list or subset is again available for calling. The raw values used to calculate the quota are dependent upon the outcome codes of each record and must be passed by the agent business applications to Oracle Advanced Outbound Telephony.

Recycling Records

Recycling is the process of determining how to process records that have been dialed. When a record is returned, a user-definable recycling algorithm is executed, which looks at the record, the call outcomes, the call results, and previous calls to the record.

For example, if a call ends up with a status of "Busy," you can assume that it's likely that the decision maker is at home; therefore, you will probably want to call the customer

back within a few minutes. Oracle Advanced Outbound Telephony can automatically schedule a record with a busy outcome to be attempted in 10 minutes. On the next attempt, if the line is still busy, Oracle Advanced Outbound Telephony can call back the customer in another 15 minutes.

Likewise, if there is a "No Answer" in the morning, Oracle Advanced Outbound Telephony may schedule the next call to be attempted during the afternoon of the same day.

Call recycling also occurs for target groups that have contact outcomes. For instance, some applications automatically schedule callbacks after a call has resulted in a literature request. The application may schedule a callback for five days in the future, giving the customer time to receive and review the mailing. After the five days have passed, Oracle Advanced Outbound Telephony automatically calls the customer back, allowing the agent to reinforce the information sent by mail and close the sale.

Benefits of Recycling

Recycling provides the following benefits:

- Recycling ensures optimal list penetration and contact rates through intelligent scheduling of callbacks.

- The recycling strategy can be modified using the user friendly GUI provided in Oracle Advanced Outbound Telephony.

- Each list can have its own recycling strategy or share a recycling strategy.

Possible Actions for Recycling

- **Call back at date** - Call the number back on a specified date and time.

- **Call back in interval** - Call the number back in a specified number of hours and minutes.

- **Call back in n days** - Call the number back at the same time in a specified number of days.

- **Call back in n days at** - Call the number back at a specified time in a specified number of days.

- **Call back next <day of week>** - Call the number back at the same time on the next occurrence of the specified day.

- **Call back next <day of week> at** - Call the number back at a specified time on the next occurrence of the specified day.

- **Call back next month** - Call the number back on the same day and time next month.

- **Call back next month at** - Call number back at a specified day and time next month.

- **Call back next week** - Call the number back on the same day and time next week.

- **Call back next weekday** - Call the number back at the same time on the next occurrence of a weekday (Monday through Friday).

- **Call back next weekday at** - Call the number back at a specified time on the next occurrence of a weekday (Monday through Friday).

- **Call back next weekend day** - Call the number back at the same time on the next occurrence of a weekend day (Saturday or Sunday).

- **Call back next weekend day at** - Call the number back at a specified time on the next occurrence of a weekend day (Saturday or Sunday).

- **Call back next week at** - Call the number back at a specified day and time next week.

- **Call back today at** - Call the number back at a specified time later today.

- **Call back tomorrow** - Call the number again at any time within the callable hours of the following day.

- **Call back tomorrow at** - Call the number back at a specified time tomorrow.

- **Do not use record** - Prevents the record from being dialed. Use this action in instances where you do not want a particular number dialed again, such as when several unsuccessful attempts to reach the customer have been made, or when a customer has requested to be taken off the calling list.

- **Move record to list** - Makes a copy of the record in AMS_LIST_ENTRIES for the destination target group and the record is marked as do not use in the source target group. This new record will be visible in the destination target group from the Marketing admin screens, and the target group record counts will be updated. In order to execute a Move to List action, both the source and destination target groups must be in either "Executing" or "Locked" state and they must be call-center ready.

  Each target group must have been validated at least once, and you may only move entries between target groups of the same source type.

- **Use next phone number** - Defers to the next listed number for a customer. For example, if you have both a work and a home number for a customer and several attempts have been made to reach the customer at work, you can use this action to try the customer on the home number.

Possible Conditional Check Commands

Condition	Description
List field is	This condition checks a field in the call record for a specific value.
Call attempt is	This condition checks the number of call attempts made on this record.
Outcome of the nth previous call is	This condition checks n consecutive previous call attempts for a specific outcome.
Outcome code is	This condition checks value of the outcome code returned from the interaction.
Result code is	This condition checks the value of the result code returned from the interaction.
Reason code is	This condition checks the value of the reason code returned from the interaction.
Call attempt on current contact point is	This condition checks the value of current call attempt to this contact point.
Consecutive outcome to current contact point is	This condition checks the value of the outcome of current call attempt to a contact point against previous call attempts to the same contact point. This count will start at 1.
	For example, if the current call attempt results in a Busy outcome and the previous two call attempts to the same contact point also resulted in outcomes of Busy, then the consecutive count would be 3.
The day of the week is...	This condition allows you to recycle a record based on what day of the week it is or is not when the record is called.

Condition	Description
The time of nth call is...	This condition allows you to recycle a call based on what time of the day it was when a previous call attempt was made for this record. The specified number (n) stands for the number of calls ago. The number you specify for "n" must be within the last 20 calls. For example, if you have a calling plan that begins calling records on a Mon - Wed - Fri basis then switches to Tues - Thurs calling if no connects are achieved, you could use this algorithm to dictate when a record should shift from the Mon - Wed - Fri pattern to the Tues - Thurs pattern.
The time of nth previous call...	This condition allows you to recycle a record based on the time within the called timezone that nth previous call was placed.
The time of the call	This condition allows you to recycle a call based on the time that current call was placed.

Recycling Algorithms

The recycling algorithms you create determine how a record is recycled. Recycling algorithms are composed of conditions, sub-conditions, pre and post-processing actions, and actions to perform if no sub-conditions are met.

When creating a recycling algorithm, you must first decide whether you will use an existing algorithm as a model for your new one, or whether you want to create a completely new algorithm. If an existing algorithm contains relatively similar pre or post-processing actions, conditions or sub-conditions, you should use it as a basis for your new algorithm. The Oracle Advanced Outbound Telephony HTML Administration console allows you to do this by permitting you to copy existing algorithms. If your new algorithm will be significantly different from any existing ones, you should create a completely new algorithm.

You must then add or modify pre or post-processing actions (not required), or the conditions or sub-conditions for the algorithm. You then need to add an action for each condition or sub-condition. These actions will determine how the record is handled if the condition or sub-condition under which you add it is met.

> **Note:** Each condition or sub-condition must have an associated action or you will receive an error.

Recycling Algorithm Conditions

Conditions determine how the algorithm processes records that have been dialed. Conditions are composed of three parts:

- A condition

- An operator

- A value

To avoid confusion, since the first component of the condition is also called a condition, we refer to the entire statement (condition, operator, and value) as an expression. Expressions are structured in the following order: *condition operator value.* For example: *STATUS contains ACTIVE* (where *STATUS* is the condition, *contains* is the operator, and *ACTIVE* is the value), or: *HOUSEHOLD_SIZE greater than 3* (where *HOUSEHOLD_SIZE* is the condition, *greater than* is the operator, and *3* is the value).

The Oracle Advanced Outbound Telephony HTML Administration console displays conditions and their sub-conditions in a treeview model.

Example:

Condition 1

- Sub-condition 1

  Sub-condition 2

Condition 2

- Sub-condition 1

In the above example, Condition 1 and Condition 2 are top level conditions. If you want to have more than one expression in a single condition, it is very important how the expressions are joined (by AND or by OR).

If you want to have multiple top level conditions in your recycling algorithm, their order is very important. Once a condition is met, Oracle Advanced Outbound Telephony ignores all other conditions at the same level and only completes execution for the process within that condition block. In the above example, if Condition 1 is met, then Condition 2 (and Sub-condition 1 under Condition 2) will be ignored.

Recycling Algorithm Sub-Conditions

Sub-conditions allow you to further refine how each condition in your algorithm handles dialed records. For example, you could have the following condition statement:

- Outcome code equal to No Answer

For this condition statement you could add sub-conditions that further define how the condition processes dialed records. For example, you could add the following

sub-conditions to the Outcome code equals No Answer condition:

- Call attempt equal to One

- Call attempt equal to Two

- Call attempt equal to Three

By adding these sub-conditions, you can establish a different handling procedure for each calling attempt. Each of these sub-conditions will need an action added to it to determine how Oracle Advanced Outbound Telephony handles the call attempt if none of the sub-conditions are met.

Recycling Algorithm Pre and Post-Processing Actions

Recycling algorithms utilize pre and post-processing actions to determine what happens to records before and after (respectively) the conditions apply.

Pre and post-processing actions are pre-seeded statements. The pre and post-processing areas in the Oracle Advanced Outbound Telephony HTML Administration console allow you to access and utilize these pre-seeded statements. These statements allow you to do virtually anything you want before or after (respectively) the conditions of the recycling algorithm - check for any condition you want and then take action based on the checked conditions, or initialize or clear variables needed during the recycling process.

Recycling Algorithm Actions Performed if no Sub-Condition Are Met

Actions if no sub-conditions are met are pre-seeded actions that you can add to the root level, a condition, or a sub-condition that establish a method of handling the record in the event the top level conditions or sub-conditions under that top level condition are not met. If a condition or sub-condition is met, it's associated action will be utilized. However if no conditions or sub-conditions are met, none of their actions will be utilized; therefore, you must add an action if no sub-conditions are met to handle these occasions.

For example, if you had the following condition and sub-condition statement:

Condition 1: Outcome code equal to No Answer

- Sub-condition 1: Call attempt equal to One

   Sub-condition 2: Call attempt equal to Two

   Sub-condition 3: Call attempt equal to Three

To each of these sub-conditions you can add an action which will determine what happens to the record if no sub-condition are met. For the first call attempt, you could add an action of **Call back next Monday**. For the second attempt, you could add an action of **Call back next Saturday at 11:30**. For the third call attempt, you could add an action of **Call back next week**. By adding an action for each sub-condition, you can set

up different processing paths for each separate call attempt.

Generating Reports

Call centers are dynamic environments; being armed with real-time information is critical in decisions such as managing list depletion/exhaustion and managing the productivity of the interaction center agents.

Oracle Advanced Outbound Telephony logs information to two areas: Oracle Customer Interaction History and Interaction Center Intelligence.

Information logged into Oracle Customer Interaction History contains only dial attempts made by Oracle Advanced Outbound Telephony that did not result in a call connect, therefore was not forwarded to an agent. The log entries in Oracle Customer Interaction History from Oracle Advanced Outbound Telephony help to build a complete picture of calling efforts. Calls that were completed and transfer to an agent application will have log entries from the agent application. The combination of log entries from both sources will provide a complete view of the calling effort and its results.

Information logged into Interaction Center Intelligence (ICI) is for the purpose of providing some real-time reports on the dialing efforts. Information feed to CCI is done on an interval basis, and reflects up-to-date information on the interaction center performance such as: break down of the types of calls made, break down of call outcomes, limited agent information in terms of number of agents, and break down of records left to be dial.

The report data is only maintained for a 24-hour period. The time at which the reports are cleared daily can be set at the Campaign Activity level. To set this time:

1. Log into the HTML admin pages with the Advanced Outbound Administrator responsibility.

2. Select the Campaign Activity whose Reset Time must be changed.

3. On the Interaction Center Campaign Activity Details page, under the Interaction Center Parameters area, select the desired reset time from the hour and minute lists, and click **Update**.

   All times are now set and displayed in the user's local time. The UI calculates the conversion and stores/retrieves times from the database.

Oracle Advanced Outbound Telephony allows you to generate the following reports:

Report Name	Report Description
Dialing Statistics	Displays the details of calls placed for a campaign/activity. Provides you with an ability to evaluate the efficiencies of a campaign activity calling effort.
Campaign Call Results Detail	Provides you with a view of the distribution of call results for a given campaign/activity that is currently active in the call center.
Campaign Record Detail Statistics	Provides you with a detailed view of the distribution of records for one active campaign. Statistical data for the report reflects back to when the campaign has become active.
Campaign Record Summary Statistics	Provides you with a quick glance view of the distribution of records for all campaigns that are currently active in the call center. Statistical data for the report reflects back to when the campaign activity has become active.
Campaign Agent Performance Statistics	Provides you with a view of the distribution of call results among lists and subsets for a given campaign/activity that is currently active in the call center.
Campaign Performance Statistics	Displays details of campaign activity performance with real-time records available/consumed and agents' activity for each campaign/activity.
Agent Call Results Detail	Provides a view of the distribution of call results among the agents for a given campaign/activity that is currently active in the call center.

Report Name	Report Description
Campaign Time Zone Detail	This report shows the number of callable records in each time zone served by the specified campaign/activity. The record count takes into account all callability rules (e.g. calendars) for the time zones displayed.
	This report maintains up-to-date counts as long as the Advanced Outbound Telephony Central Server is running. The Reset Time has no effect on this report.

Server Groups

A server group is also known as an interaction center. Interaction center servers (e.g. UWQ, OTM) typically belong to a server group. An exception to this is the Oracle Advanced Outbound Telephony Central Server, which exists one per CRM instance. A server group typically represents the concept of a call center, but this is not required.

Agents are assigned to server groups using Oracle CRM Resource Manager. Servers are assigned to server groups using the Interaction Center Server Manager (ICSM) interface, which requires the Call Center HTML Administrator responsibility.

Subsets

A subset is a set of entries within a list identified by field values. Subsets are dynamic, and can be created and deleted at will within the context of a list.

When subsets are used, a default subset is created that contains any list entries not contained in the user-defined subsets. Any list entries that exist in two overlapping subsets will be placed in the subset that has the higher priority level.

For example, if you have one subset for people with last names beginning with "A" through "C" and another subset for people with incomes between $50,000 and $100,000, some names might appear in both subsets. Whichever subset has the higher priority of the two will be the subset in which the records are placed upon validation or when updating the campaign activity.

You create list subsets by designating conditions. When records meet the designated conditions they are placed in the list subset. Conditions are composed of three parts:

- A field

- An operator

- A field value

Conditions are structured in the following order: *field operator field value.*

Condition Structure Example

ADDRESS contains VA - where *ADDRESS* is the field, *contains* is the operator, and *VA* is the field value.

Subset Example

A call center administrator has a list containing a generated score in the field called 'SCORE.' This contains values from 1 to 5. Additionally, a field called 'STATE' of the score value, the administrator would like to create the following subsets:

- Subset 1: SCORE = 5

- Subset 2: SCORE = 3 or SCORE = 4

The marketing campaign is expected to get much better results in New York, so an additional subset is created:

- Subset 3: STATE = 'NY'

The default subset at this point contains list entries that match:

- scores that do not equal 5

- scores that do not equal 3 or 4

- all states except New York

Each of these subsets can be given its own priority, quantum, or quota value. If the interaction center administrator decides that there may be a possible difference in results between the score value of three and four, they can create a new subset:

- Subset 4: SCORE = 4

and edit the existing subset 2:

- Subset 2: SCORE = 3

Subset Priority

In previous releases, a record could match the criteria for multiple subset definitions, thus making it difficult to determine what release criteria was used to release the record. Subset priority is a means of mediating record membership to one subset. Based on the order of the subset definition, the record matching the first subset definition will become a member of that subset, thus making the order of the subset definition important. Subset priority based on order will eliminate ambiguities as to which subset a record is a member.

For example, lets say you are selling season tickets for NFL football games. You have several subsets already, including: one for males, one for people between the ages of 25 and 35, and one for people with incomes over $100,000 per year. It is entirely possible

for a call record to be a member of one or all of the above subsets. Since you will most likely receive better results from the over $100,000 subset, that is the subset you should execute upon first. You can use subset priority to prioritize the over $100,000 subset, and also to also pull multi-subset call records (where one of the subsets is the over $100,000 subset) into the over $100,000 subset only.

Time Zone Management

Oracle Advanced Outbound Telephony manages time zones transparently to the call center administrator. As mentioned earlier, this is dependent on every contact point (telephone number) having an associated country code and time zone value. All of these items are owned by TCA. All countries represented in a calling list must be mapped to a time zone.

Time Zone Mapping

If your data does not provide time zone information for your contact points, and you cannot use the validation rules to specify the time zone at the list level, then you will need to create time zone mappings in order to validate your lists.

There are three different types of time zone mappings.

- Mapping a territory code to a time zone.

- Mapping a territory code and area code to a time zone.

- Mapping a territory code, area code, and postal code to a time zone.

Even if this type of mapping exists, postal codes cannot be used in determining the appropriate time zone unless a validation rule is created (and associated with desired list(s)) to enable such mapping lookups

In general, you should try to use the first type of mapping as it allows for the best validation performance and requires the least amount of effort to create. However, there are certain countries split among different time zones, and the second type of mapping is required to accurately determine the correct time zone. You should only create the third type of mapping when absolutely necessary as it leads to a large number of records in the time zone mapping table, reducing the performance of lookups.

Time Zone Mapping

Oracle Advanced Outbound Telephony contains time zone mapping tables that must be defined. Many countries only occupy a single time zone, but others are spread across multiple time zones. If your interaction center plans to make calls throughout countries (for example: United States or Canada) where many states and provinces fall in different time zones, you may need to provide the state/region postal codes and area codes to determine that Oracle Advanced Outbound Telephony is using the correct time zone for the customer. There are database load utilities readily available within the database that can be used to upload purchased data into the Oracle Advanced

Outbound Telephony Schema.

To ensure that customers are called at the appropriate times, Oracle Advanced Outbound Telephony must know where the person resides in relation to time zones. This way Oracle Advanced Outbound Telephony can follow the appropriate telemarketing laws that govern calling in their particular country, state, country or city.

The time zone mapping form is used as an easy entry point to provide Oracle Advanced Outbound Telephony with a method to call customers or contacts.

At a minimum, the country code and time zone must be entered for each country that an interaction center will contact. It is mandatory that all countries map their time zone with their country name.

For single time zone countries, no further information is needed.

For countries with more than one time zone, it is recommended that you map the appropriate time zone, country code, and optional area code, postal code, state/region information to assist Oracle Advanced Outbound Telephony during list validation time. By utilizing the address specific information, Oracle Advanced Outbound Telephony can match a customer record with the appropriate time zone and country if their customer record is incomplete.

This functionality is especially important in countries where there are multiple time zones. For example, the United States has eight time zones spanning from Saipan, Northern Mariana Islands, U.S.A. (Standard time zone: UTC/GMT +10 hours where daylight saving time currently not observed) and Honolulu, Hawaii, U.S.A. (Standard time zone: UTC/GMT -10 hours where daylight saving time currently not observed). In addition, there are many states who have either multiple time zones and may or may not participate in daylight savings time.

For example: The state of Indiana has up to three different time zones depending on the location in the state. To ensure we call the customer at the correct time, we need to know exactly where the customer is and follow the laws for their state. In this case, Oracle Advanced Outbound Telephony may need to go down to the postal code to ensure that the correct time zone is being used for the customer record.

> **Note:** Postal code mapping only utilizes the address for the contact party and may not necessarily reflect the location of the contact point (for example: phone number).

Trading Community Architecture

The Trading Community Architecture (TCA) is a customer model designed to support complex trading communities. TCA strives to model *all* relationships within a trading community. For example, the trading community of an appliance manufacturer may include suppliers, distributors, resellers, retailers, service providers, business consumers, and end users. The appliance manufacturer not only wishes to track relationships between itself and other entities within this trading community, it also

takes an interest in relationships that other community members have with each other. The manufacturer may not even have direct relationships with all such members; nevertheless, it needs to know about them and how each relates to other entities within the community.

Validation History

Once you have run a validation report, a Validation History hyperlink appears on the side panel of the Validation Report page in the Oracle Advanced Outbound HTML Administration console. Clicking this link allows you to view a historical listing of every time validation has been run on the selected campaign activity.

Validation Report

A View Report column has been added to the summary view table of existing lists on the Interaction Center Campaign Activity Target Groups page. Clicking the View Report hyperlink provided in this column generates a report furnishing the following information:

Row/Column Name	Description
Validation Status	Shows whether or not the selected list is validated.
Number of Valid Records	Shows the number of validated records within the selected list.
Number of Invalid Records	Shows the number of records that failed validation within the selected list.
Reason for Invalidity	Provides a reason why each Number of Records column entry failed validation.

Validation Rules

Validation rules are composed of actions and these rules allow you to make exceptions to the automatic list validation process. For example, you can use validation rules when you don't know the country code or time zone, but you know you will be dialing calls in a certain time zone. If the country code or time zone is not known these records will fail the list validation process and will not be dialed. You can set a validation rule to allow you to dial these records because you are confident of what is in the list. By doing this, you can prevent these calls from failing the list validation process, and thereby not being dialed.

Validation Rule Actions

Rule Action	Description
Country is...	This action allows you to specify the phone country code at the list level. The phone country code refers to the country code used when dialing a number. For example, the phone country code for US and Canada is 1. This rule is useful when every number in a list uses the same phone country code, and that phone country code is not specified in the phone country code attribute of the contact point. A complete list of valid phone country codes can be found in the HZ_PHONE_COUNTRY_CODES table.
Disable validation of area code lengths	This pertains to non-standard number lengths (prevalent in some countries.) For example, if a phone number format has been created for the country you're validating, but does not pertain to your list, then you can use this action.
Disable validation of cell phone numbers	This pertains to non-standard number lengths (prevalent in some countries.) For example, if a phone number format has been created for the country you're validating, but does not pertain to your list, then you can use this action.
Disable validation of phone number lengths	This pertains to non-standard number lengths (prevalent in some countries.) For example, if a phone number format has been created for the country you're validating, but does not pertain to your list, then you can use this action.

Rule Action	Description
Enable incremental parsing of area codes	This rule allows you to enable incremental parsing of area codes from the phone number and raw phone number attributes. This allows validation to parse the area code from the phone number attribute, by iteratively comparing the area code digits to a list of valid area codes (in IEC_G_CC_AC_TC_MAPS) until the correct match is found. There must be entries for all of the potential area codes in IEC_G_CC_AC_TC_MAPS in order to successfully parse the area code. The US and CA area codes are provided.
Enable incremental parsing of phone country codes	This rule allows you to enable incremental parsing of phone country codes from the raw phone number attributes. This allows validation to parse the phone country code from the raw phone number attribute, by iteratively comparing the phone country code digits to a list of valid phone country codes (in HZ_PHONE_COUNTRY_CODES) until the correct match is found. There must be entries for all of the potential phone country codes in HZ_PHONE_COUNTRY_CODES in order to successfully parse the phone country code. The data for most (if not all) countries is provided.
Enable use of zip codes in determining correct time zone using mappings	This rule allows you to enable the use of postal codes while performing time zone mapping lookups. There are only a few cases when this data is necessary to determine the correct time zone, and this functionality will slow validation considerably.
Phone country code is...	Use this when the phone country code is not in the database but you know which country code all the phone numbers are in.

Rule Action	Description
Region is...	This action allows you to specify the region (state/province) at the list level. Regions are stored in the JTF_LOC_AREAS_VL and are created/updated in Oracle Marketing (Administration/Marketing/Geography). Oracle Advanced Outbound Telephony only recognizes locations of type STATE as regions. This rule is only useful when every phone number in a list is within a single region and the region is not specified via an Area Code Mapping.
Require that a contact point have a region to pass validation	This rule allows you to require that a contact point have a region to pass validation. This is recommended if the administrator only wants to call contact points for which a region calendar can be used to determine whether or not the contact point is callable.
Time zone code equals time zone...	Use this when a non-standard timezone code is entered in the database. The list may have any string as its timezone code; use this to map the string to a time zone Oracle Advanced Outbound Telephony recognizes. You can use the "time zone" and "Update time zone" columns on the Target Group Entries page to accomodate any string that may be entered for the time zone.
Time zone is...	This rule allows you to specify the time zone at the list level. This rule is useful if every contact point in the list belongs to the same time zone that is known by the administrator, and/or time zone data is not provided for the contact points. This option will also speed the validation process since less work will be done to determine the correct time zone.

Rule Action	Description
Time zone mappings over-ride time zone data provided for contacts, where an appropriate mapping exists	This rule allows you to enable the unconditional use of time zone mappings at the list level. This allows the time zone mappings to over-ride time zone data provided in the contact point's time zone attribute since the mappings are likely to be more accurate than specifying the time zone by either GMT offset or time zone name. This rule should not be created unless you have loaded the time zone mappings into IEC_G_TIMEZONE_MAPPINGS.

Validation Rule Example:

• A contact point has a time zone equal to EST. Since EST corresponds to two different time zones (United States and Australia), you can set a validation rule to map this time zone name to a unique time zone.

3

Before You Begin

This chapter covers the following topics:

- Related Documentation
- Installing Oracle Advanced Outbound Telephony
- Accessing Oracle Advanced Outbound Telephony
- User Accounts
- Responsibilities
- Dependencies
- Requirements
- Sizing Guidelines

Related Documentation

The following is a list of documentation containing information that will assist you when implementing Oracle Advanced Outbound Telephony:

- *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 Advanced Collections Implementation Guide*

- *Oracle Advanced Collections User Guide*

- *Oracle Advanced Inbound Telephony Implementation Guide*

Installing Oracle Advanced Outbound Telephony

You install Oracle Advanced Outbound Telephony 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 to 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 Advanced Outbound Telephony

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.

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 Advanced Outbound Telephony.

Responsibility	Function	Interface
Call Center HTML Administration	Allows you to manage multiple aspects of interaction center, including: ICSM, and UWQ Media Actions.	HTML
Oracle Marketing Campaign WorkBench SuperUser	Allows you to manage Oracle Marketing operations, including the creation of campaigns, and campaign activities.	HTML
Oracle Marketing Audience SuperUser	Allows you to manage Oracle Marketing operations, including the creation of lists, and target groups.	HTML
Oracle Advanced Outbound Telephony Administrator	Allows you to manage Oracle Advanced Outbound Telephony operations.	HTML
Advanced Outbound Performance Monitor	Allows you to monitor Call Center performance.	HTML
Interaction History JSP Admin	Allows you to create outcome, result, and reason codes.	HTML
Oracle Marketing Administrator	Allows you to create custom target group priority levels.	HTML
Sales Online Super User	Allows you access to the Oracle Sales Application, where you can assign agents to campaigns.	HTML

In the Forms interface, if an application user has only one responsibility, then the related menu or application (if there is only one function in the menu) appears after the

user signs on. If an application user has more than one responsibility, then a list of available responsibilities appears after the user signs on. To switch responsibilities, choose Switch Responsibility from the File menu.

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

Dependencies

The dependencies for Oracle Advanced Outbound Telephony can be divided into two categories, including: Oracle products, and third party products.

Oracle Products

These products must be completely installed and configured prior to the installation and implementation of Oracle Advanced Outbound Telephony. For more information on installing these products, please refer to each product's individual Installation and Implementation Guides. Each of these products may have its own prerequisites, for example TeleSales and UWQ require Oracle Resource Manager and can integrate with Oracle HRMS.

Oracle Advanced Outbound Telephony depends on the following Customer Relationship Management (CRM) products:

- CRM Foundation, including Oracle Customer Interaction History and Universal Work Queue (non media component)

- Oracle Marketing

  - Campaign, Activity, List

  - Prepare Campaigns/Activities for Advanced Outbound Telephony

- Oracle Universal Work Queue

  - Enables Media for AO

  - Associates AO with appropriate Media Action

- An Oracle business application (such as Oracle Telesales or Oracle Advanced Collections)

- Oracle Advanced Inbound (unless using manual dialing)

  - Oracle Telephony Manager

- Telephony Media Controller (optional)

- Inbound Telephony server (optional)

- Routing server (optional)

- Server Monitor (optional)

- UWQ server

  Oracle Advanced Outbound Telephony integrates with Oracle Advanced Inbound in several ways:

- The Oracle Advanced Outbound Telephony Dial Server must be added to the Interaction Center Server group which was created during the Advanced Inbound Implementation

Third Party Products

- Envox CT-Connect or Cisco ICM

  These are middleware products that provide a command interface between computers and telephony -- computer-telephony integration (CTI). They enable Oracle Advanced Outbound Telephony to issue dialing commands to the PBX and to route successful calls to the agent desktop.

- A web browser - Microsoft Internet Explorer (5.5 or above with Service Pack 2)

- An ACD or PBX switch approved for use with Oracle Advanced Outbound Telephony

  > **Note:** Compatibility between Oracle Advanced Outbound Telephony and third party products, including Computer-Telephony Integration middleware and switches, is certified after testing with each release of these Oracle products. Each combination of a switch, the switch vendor's own software release, and each CTI middleware release, must be certified independently. While Cisco ICM and Dialogic CT-Connect are the two middleware products currently supported by Oracle Advanced Outbound Telephony, there are limitations on the certified combinations of phone switches, switch software, and CTI middleware with each version of these Oracle products.

  > **Note:** The certification information changes with some frequency, as third parties add and drop products and versions, and as Oracle's certification process proceeds. Therefore, current

certification information is maintained on a web site, accessible to Oracle sales and product development personnel and to Oracle partners.

> **Note:** Customers should always have their Oracle sales channel verify, from the web site, that the combination of phone switch, switch vendor software and version, switch configuration, CTI middleware software and version are compatible and supported, prior to making an implementation plan.

Requirements

This topic group contains the following topics:

- Minimum Software Requirements, page 3-7

- Minimum Hardware Requirements, page 3-9

Minimum Software Requirements

To successfully implement Oracle Advanced Outbound Telephony, the following software must be installed and configured prior to the implementation of Oracle Advanced Outbound Telephony:

Oracle Software

- Oracle Applications release 12

    - The Oracle CRM system database must be installed and configured prior to the installation of Oracle Advanced Outbound Telephony. You must enter database information during installation and configuration steps. Oracle Advanced Outbound Telephony supports Oracle 8i database release 8.1.6 or later

    - CRM Foundation components, including Oracle Customer Interaction History and Resource Manager.

        > **Note:** Each of these products may have its own dependencies: Oracle Universal Work Queue requires Oracle Resource Manager and Oracle HRMS; Oracle Marketing requires Oracle Discoverer, and Oracle Workflow; etc.

    - The goal of Oracle Customer Interaction History is to provide Oracle CRM applications with a common framework for capturing and accessing

interaction information associated with every customer contact. IH is the central repository and provides a consistent API for tracking all automated or agent-based customer interactions. Oracle Customer Interaction History is part or CRM Foundation and installed with Oracle Rapid Install 12.

- Resource Manager provides the capability for sales managers to easily add and update sales agent and partner profiles. It enables the managers to import sales group hierarchy from Oracle Human Resources on the vendor side, and to create and maintain agent and group profile for vendor or partner

- Oracle Marketing
  - Oracle Marketing is a complete marketing automation software application designed to effectively plan, manage, execute, and ultimately analyze and optimize overlapping customer-focused programs to assist companies in winning and retaining profitable customers. Oracle Advanced Outbound Telephony interconnects with Oracle Marketing, which creates campaigns and lists to execute. You must purchase and implement Oracle Marketing separately from Oracle Advanced Outbound Telephony.
  - You also need Oracle Discoverer and Oracle Workflow for Oracle Marketing

- Oracle TeleSales or Oracle Advanced Collections (business application)
  - Oracle Advanced Outbound Telephony 12 is supported by Oracle TeleSales and Oracle Advanced Collections as desktop applications and should be implemented at this time.

- Oracle Universal Work Queue (UWQ)
  - UWQ is required for both Oracle Advanced Outbound Telephony and Oracle TeleSales. UWQ provides a graphical user interface that serves as a work portal for the agent and delivers telephony metadata to the agent work area.
  - Oracle HRMS for UWQ
  - Oracle Resource Manager for UWQ

- Oracle Advanced Inbound
  - Oracle Telephony Manager (required)
  - Oracle Telephony Media Controller (optional)
  - Oracle Inbound Telephony Server (optional)

- Oracle Routing Server (optional)

- Server Monitor (optional)

Third Party Software

- Microsoft Windows NT 4.0, SP3 or Windows 2000

- Oracle approved internet browser

  - Netscape XXX

  - Microsoft Internet Explorer 5.5

- CTI Middleware

  - CT-Connect Client 5.2 (if using CT-Connect as the CTI middleware)

  - Cisco ICM (no client necessary for the Cisco ICM middleware)

Minimum Hardware Requirements

When implementing Oracle Advanced Outbound Telephony, you should consider the following when deciding on your minimum hardware requirements:

- Advanced Inbound and CRM disk space and memory requirement guidelines

- Oracle Advanced Outbound Telephony disk space and memory requirement guidelines

- The number of agents in the call center

- Call center volume

Memory requirements vary with the number of CRM applications being used on a particular instance, the number of users using each of the applications, and the estimated volume of customer interactions and application use.

General Hardware Requirements

You will need the following:

- ACD/PBX, outbound telephony lines (trunks)

  - The ACD/PBX must be installed and operational. It must also be configured by the vendor for computer telephony integration.

  - Trunks are dependent upon call volume, call center size, and so on. Each agent

must have 1 channel to go out and 1 channel for the dialer. Oracle recommends a 1 to 1 trunk to agent ratio in cases of high voice rate (when we expect a high percentage of dials to result in a live voice). However, if the voice rate is low (say 30%) or when live agents are expected to leave answering machine messages, a higher dialer-to-agent ratio is acceptable. This ratio should not be 2 to 1.

- Telephony middleware server

  - The telephony middleware server acts as the translator between the ACD/PBX and the Oracle Telephony Manager (OTM) and the Oracle Advanced Outbound Telephony Dial Server. Two choices are available, Dialogic CT-Connect and Cisco ICM.

  - When Dialogic CT-Connect is used, the Oracle Advanced Outbound Telephony Dial Server connects through CT-Connect through the network. OTM uses the Telephony Adapter Server to reach CT-Connect. Both CT-Connect and ICM include server software that must be installed on an appropriate server machine. Consult respective Dialogic and Cisco documentation for details.

  - When Cisco ICM is used, the call center services use a Cisco-provided API to connect to the ICM server. No client is necessary on the Telephony Adapter Server box(es).

- Agent telephone set

  - The agent, supervisor, and manager telephone set must be installed and operational. Each telephone set must be able to accept incoming calls from the ACD/PBX.

- Call center server(s)

  - Oracle Advanced Outbound Telephony is dependent on several other Interaction Center Servers. These include:

    - Oracle Telephony Manager (OTM)

    - Universal Work Queue (UWQ)

- Oracle Telephony Adapter Server

  - The Telephony Adapter Server component is crucially important to Oracle Advanced Outbound Telephony. There are, however, several additional AO-specific configuration steps to be done

  - The Oracle Advanced Outbound Telephony Dial Server uses the Telephony Adapter Server for CTI control.

Sizing Guidelines

The Oracle Advanced Outbound Telephony services can be run on any approved CRM platform.

This topic group contains the following topics:

- Sizing Parameters for the Oracle Advanced Outbound Telephony Servers, page 3-11

- Factors That Determine the Hardware Size, page 3-12

Sizing Parameters for the Oracle Advanced Outbound Telephony Servers

The Dial Server

The Oracle Advanced Outbound Telephony Dial Server is moderately memory intensive, however, it is heavily network intensive due to its communications with the UWQ agent and UWQ server, as well as the database.

The following table provides sizing recommendations for the Oracle Advanced Outbound Telephony Dial Server:

# Agents	Minimum Memory	Maximum Memory	Thread Count
1 - 100	128 Megs	256 Megs	300
101 - 250	256 Megs	512 Megs	500
251 - 500	512 Megs	1024 Megs	1000

The number of trunks is dependent upon call volume, call center size, and so on. Each agent must have 1 channel to go out and 1 channel for the dialer. Oracle recommends a 1 to 1 trunk to agent ratio in cases of high voice rate (when we expect a high percentage of dials to result in a live voice). However, if the voice rate is low (say 30%) or when live agents are expected to leave answering machine messages, a higher dialer-to-agent ratio is acceptable. This ratio should not be 2 to 1.

The Central Server

The Oracle Advanced Outbound Telephony Central Server is not memory or server intensive, however, it does rely heavily upon the database. Therefore, when you are considering an AO implementation, ensure that you have allocated enough disk space, memory, and have a large enough CPU to handle all of the requirements that AO will place on it in the future.

Most of the Central Server's operation consists of scheduling the execution of PL/SQL on the database. However, it requires 20 or so database connections (problems will arise if the database connection (dbc) file has a low value for the number of connections (NUM_CONNECTIONS).

The amount of disk space is largely determined by the level of logging you want to utilize. Logging levels can be set from 0 to 4.

- Oracle recommends that you use Output Level 1 in normal operations for moderate logging without slowing performance or taking up large amounts of disk space.

- Level 0 returns no logging, but results in the fastest performance and takes up very little disk space.

- Level 4 returns the most detailed logging, such as for troubleshooting, but results in slower performance and requires a large amount of disk space.

Factors That Determine the Hardware Size

The following factors must all be taken into consideration when determining the hardware size for Oracle Advanced Outbound Telephony:

- Number of concurrent agents

- Expected volume of calls

- Network throughput

The number of services (one service = one running instance of the software) and servers varies, based on the needs of an individual call center. There will only be one Oracle Advanced Outbound Telephony Central Server needed per CRM instance, but you may need multiple Oracle Advanced Outbound Telephony Dial Servers (depending on your business needs).

4

Implementation Overview

This chapter covers the following topics:

- Implementation Planning
- Implementation Prerequisites
- Process Description

Implementation Planning

There are two areas of consideration when planning an Oracle Advanced Outbound Telephony implementation. The first area includes collecting the information you need to implement the application. The second area involves system configuration planning (size, speed, number, etc.).

The planning process involves:

- Collecting Information, page 4-1

- Setup Planning, page 4-3

Collecting Information

Use the following list of questions to determine your implementation needs:

1. What type of Outbound Application will you be using? Oracle TeleSales? Oracle Advanced Collections?

2. What dialing strategy will you be using? Manual? Progressive? Preview? Timed Preview?

   Depending on your dialing method, you may need to confirm the best way to handle the processing of the list. How many agents will be handling the campaign activity? If there are a few, you might want to run a progressive campaign.

3. What is your PBX Name? PBX type? PBX server?

4. What Computer Telephony Integration will you be using? (Server, type, configuration, etc.).

5. What are your agent extension numbers?

6. What will your outbound call volume be (calls/hr., average, low and peak usage)?

7. Do you have any special calling requirements and restrictions (restrictions on number of calls, call time, etc.)?

8. Any Federal, State and local laws and/or regulations that govern telemarketing, such as the callable hours during the weekdays, weekends and holidays.

9. What will you be using for your test agent information?

10. What will you be using for your test data?

11. What validation information will you be using?

    • Area Code/Time Zone Mapping Data

12. How do you want to handle call outcome and recycle handling information?

    • Do you want to emphasize initial call attempts or emphasize persistent callbacks?

    • How do you want to handle wrong numbers and other special cases?

      For every campaign activity, you need to create recycling strategies that best correspond with the needs of the business. How do you plan to handle a record that is returned after it has been dialed for a non-connect? Do you really need to reach the client, or can the call wait a day?

13. What Dialing Access Information will you need?

    • T1, E1 line control mode (Onhook/Offhook)

    • External line access (dial 9)

    • Local calls (same area code, different area code)

    • Long distance access code (same area code, different area code)

    • International access code

    • Area code information

- Special dialing information for PBX (always dial all digits, etc.)

14. What are the sources of records to be dialed?

- Existing customer data?

- Imported prospect data?

- Legacy systems?

> **Note:** While there may be one or many original sources of business data, in Oracle Advanced Outbound Telephony, all data come from Oracle Marketing and is thereby part of the Oracle TCA customer model.

Setup Planning

Setup planning involves matching your business requirements to the software and hardware components necessary to best satisfy those requirements. The list of questions in this topic will aid you in determining your hardware requirements, and the sizing parameters for the Oracle Advanced Outbound Telephony servers.

General Questions

Use the following list of questions to help determine your system configuration:

1. What type of switch will you be using?

2. What type of telephone sets will your agents be using?

3. What middleware will you be using?

4. What are the extension numbers for the dialers?

5. What are your agent extension numbers?

> **Note:** Compatibility between Oracle Advanced Outbound Telephony and third party products, including Computer-Telephony Integration middleware and switches, is certified after testing with each release of these Oracle products. Each combination of a switch, the switch vendor's own software release, and each CTI middleware release, must be certified independently. While Cisco ICM and Dialogic CT-Connect are the two middleware products currently supported by Oracle Advanced Outbound Telephony, there are limitations on the

certified combinations of phone switches, switch software, and CTI middleware with each version of these Oracle products.

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Note: Customers should always have their Oracle sales channel verify, from the web site, that the combination of phone switch, switch vendor software and version, switch configuration, CTI middleware software and version are compatible and supported, prior to making an implementation plan.

System Sizing Questions

Use the following list of questions to help determine your sizing needs:

1. How big will your call center be? How many agents will you have?

2. What call volume are you expecting in your call center?

3. Will your call center be single site or multi site?

Sizing Parameters for the Dial Server

The Oracle Advanced Outbound Telephony Dial Server is moderately memory intensive, however, it is heavily network intensive due to its communications with the UWQ agent and UWQ server, as well as the database.

The following table provides sizing recommendations for the Oracle Advanced Outbound Telephony Dial Server:

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1. How many dial servers will you need?

2. To what server group will each dial server belong?

3. How do you want to set up your PBX, and Agent distributions?

4. What dialing scripts will you use?

Sizing parameters for the Central Server

The Oracle Advanced Outbound Telephony Central Server is not memory or server intensive, however, it does rely heavily upon the database. Therefore, when you are considering an AO implementation, ensure that you have allocated enough disk space, memory, and have a large enough CPU to handle all of the requirements that AO will place on it in the future.

Most of the Central Server's operation consists of scheduling the execution of PL/SQL on the database. However, it requires 20 or so database connections (problems will arise if the database connection (dbc) file has a low value for the number of connections (NUM_CONNECTIONS).

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  - Level 4 returns the most detailed logging, such as for troubleshooting, but results in slower performance and requires a large amount of disk space.

- What calling calendars will you need?

- What validation rules do you want to use?

- What recycle rules do you want to use?

- How do you want to handle callbacks, recovery, reporting?

- What number of calls per month do you anticipate?

- What is the maximum number of simultaneous outbound campaigns you want to execute?

System and User Information Questions

Use the following list of questions to help determine the information about your server groups, system, and users:

1. What is the name of the server group you created when setting up Advanced Inbound?

   Server groups are established by Interaction Center Server Manager (ICSM) as a conceptual means of associating various call center services with each other. Both the Oracle Advanced Outbound Telephony Dial Server and Oracle Advanced Outbound Telephony Central Server must be defined as part of a server group in order for ICSM to be able to communicate with AO. The Oracle Advanced Outbound Telephony Central Server must exist only once per instance. The number of Dial Servers depends on the size and volume of your interaction center.

   Only servers within the same server group can communicate with each other. Each server can be a member of one and only one server group. Every call center agent is also associated with one and only one server group. This allows the agent to connect to the services provided by the servers from that server group.

   You should link the Oracle Advanced Outbound Telephony Dial Server into the Server Group you created when setting up Oracle Advanced Inbound. Oracle Telephony Manager (OTM), a component of Oracle Advanced Inbound, must reside in the same server group as each Dial Server so that the teleset number of the agent's physical phone can be mapped to the teleset extension in OTM.

2. Have you gathered all of the necessary user information for every user of Oracle Advanced Outbound Telephony?

   This information should include:

   - Employee type

   - Employee name

   - User ID

   - Password

   - Campaigns to which they will be assigned

3. Assign the correct responsibilities to the Oracle Advanced Outbound Telephony administrator user(s):

   - **Oracle Marketing Campaign WorkBench SuperUser** - allows user to manage Oracle Marketing campaign and campaign activities.

- **Oracle Marketing Audience SuperUser** - allows user to manage Oracle Marketing lists and target groups.

- **Oracle Advanced Outbound Telephony Administrator** - allows user to manage Oracle Advanced Outbound Telephony Operations.

- **Call Center HTML Administration** - allows user to manage Call Center ICSM.

- **Interaction History JSP Admin** - Create outcome, result and reason codes, and pair them.

- **Sales Online Super User** - Associate agents or resource groups to campaign activities.

Implementation Prerequisites

Before you can implement Oracle Advanced Outbound Telephony, you must ensure the following tasks have been performed:

1. Complete an administrative-tier installation of Oracle Applications.

2. Complete a web-tier installation of Oracle Applications on each machine identified.

3. Run Rapid Install.

   Rapid Install installs the Oracle8i Enterprise Edition technology stack and the Oracle Applications file system. Rapid Install installs the following:

   - Oracle8i Enterprise Edition (8.1.6) with interMedia Text and Spatial

   - Oracle Forms Server, Oracle Reports Server, Oracle Graphics, and WebDB listener

   - Application servers WebDB and Apache, with JServ (Web tier)

   - JRE (Java run-time environment)

   - Selected Oracle applications

     - Oracle CRM Foundation, including Resource Manager and Oracle Customer Interaction History

     - Oracle Marketing (Oracle Marketing)

     - Desktop Application such as Oracle TeleSales or Oracle Advanced Collections

- Oracle ICSM (including all Advanced Inbound and Oracle Advanced Outbound Telephony servers)

- JInitiator

  - When you access certain parts of the system (for example, those based on Forms or Discoverer), you need JInitiator to supply the Java virtual machine. The latest version of JInitiator that was available at the time of the product release is on the Oracle Applications Rapid Install Server Technology CD, which can be found in the \util\jinitiator directory in the Common directory of your file system.

  - Implemented as a plug-in (Netscape Communicator) or ActiveX component (Microsoft Internet Explorer), Oracle JInitiator allows you to specify the use of the Oracle Java Virtual Machine (JVM) on Web clients instead of having to use the default JVM of the browser.

  - When it is needed, the browser attempts to load Oracle JInitiator. If Oracle JInitiator has not been previously installed, the browser downloads the necessary installation executable to the PC. Once installed, Oracle JInitiator runs the Oracle Forms Java applet and starts an Oracle Applications session.

4. Install an ACD or PBX switch and approved CTI middleware.

   - CTI middleware - CT Connect or Cisco ICM

5. Implement Oracle Marketing.

   Prerequisites for the Oracle Marketing implementation include:

   - General Ledger (GL)

   - Human Resources (HRMS).

   - Oracle Discoverer

   - Oracle Workflow

   Particular attention should be paid to the creation of marketing mediums as well. Marketing mediums are used in the integration with Oracle Advanced Outbound Telephony to determine which user receives the approval workflow for a given campaign activity.

   To be compatible with Oracle Advanced Outbound Telephony, use the following Marketing source view types:

   - B to B - Business to Business (Organization Contacts)

- B to C - Business to Consumer (Persons)

> **Caution:** While Oracle Marketing allows you to modify the source type fields, you MUST NOT remove or modify the following fields:

Per Customer - Oracle Advanced Outbound Telephony requires these fields for each customer. They are either used in the screen pop, or to check for DNC, release control, or the stop list.

- PERSON_FIRST_NAME

- PERSON_LAST_NAME

- PERSON_NAME_SUFFIX

- PERSON_TITLE

- PIN_CODE

- PARTY_NAME

- PARTY_ID

- SOURCE_CODE

- SOURCE_CODE_FOR_ID

- PARTY_SITE_ID

- POSTAL_CODE

Per Phone Number - Oracle Advanced Outbound Telephony requires these fields for each phone number.

- CONTACT_POINT_ID

- TIME_ZONE

- PHONE_COUNTRY_CODE

- PHONE_AREA_CODE

- PHONE_LINE_TYPE

- PHONE_NUMBER

- RAW_PHONE_NUMBER

- REASON_CODE

6. Install and implement Oracle Advanced Inbound.

7. Implement Oracle Universal Work Queue.

    Implementation of UWQ should include the following steps:

    - Creation of server group(s), most likely one per call center.

    - Creation of UWQ classifications for the business applications implemented above.

        > **Note:** Use the Call Center HTML Administrator responsibility to associate the appropriate form with Oracle Advanced Outbound Telephony (under the UWQ Media Association tab).

        > Set the following system profile settings for AO to "Yes":
        > - IEU: Queue Order: Oracle Advanced Outbound Telephony
        > - IEU: Queue: Oracle Advanced Outbound Telephony

8. Implement the business applications (Oracle TeleSales or Oracle Advanced Collections).

    The business application(s) should be implemented at this point.

Process Description

Once you have completed the tasks outlined in the Implementation Prerequisites, page 4-7 topic, you can begin implementing Oracle Advanced Outbound Telephony.

This topic group provides high level implementation tasks necessary to implement Oracle Advanced Outbound Telephony.

1. Creating and Administering Oracle Advanced Outbound Telephony Users, page 5-1

2. Installing and Configuring the CTI Middleware, page 5-16

3. Configuring Table Spaces in Your Database, page 5-20

4. Implementing the Oracle Advanced Outbound Telephony Servers, page 5-21

5. Setting Up Oracle Customer Interaction History, page 5-31

6. Setting Up Marketing Online, page 5-33

7. Configuring Oracle Advanced Outbound Telephony, page 5-43

8. Configuring Universal Work Queue, page 5-85

5

Implementation Tasks

This chapter covers the following topics:

- Creating and Configuring Oracle Advanced Outbound Telephony Users

- Installing and Configuring the CTI Middleware

- Configuring TableSpaces in Your Database

- Implementing the Oracle Advanced Outbound Telephony Servers

- Setting up Oracle Customer Interaction History

- Setting up Oracle Marketing

- Configuring Oracle Sales

- Configuring Oracle Advanced Outbound Telephony

- Configuring Oracle Universal Work Queue

Creating and Configuring Oracle Advanced Outbound Telephony Users

Users Overview

Prior to creating and administering users for Oracle Advanced Outbound Telephony, you must understand the types of users required.

From an Oracle Applications perspective, you must define users that can log into an Oracle Applications session, and assign each user with the appropriate responsibility or responsibilities to perform a particular set of functions.

At minimum, for each implementation, you will need to define two types of users:

- An administrator user

- An interaction center agent user (typically an employee in the enterprise)

Administrator User

An administrator must have access to functions that the typical interaction center agent will not, and administers users and applications across the broad spectrum. For example, one function of an administrator is to create agent users. This necessitates the creation of an administrative user as the first step.

To successfully implement Oracle Advanced Outbound Telephony you must create at least one administrator user. If you do not want one user account to have access to multiple Oracle applications, you can create several administrator users and assign each the appropriate responsibility. To create your administrator user, you should use the seeded (usually "sysadmin") login to access the Self-Service Login URL, which is also referred to as the Forms Login.

The administrator user does not need to be an employee in the database. However, if the administrator user is an enterprise superuser that will perform work in CRM applications as well as administrative tasks with the same login, then the administrator user must also be created as an employee in the database.

For Oracle Advanced Outbound Telephony implementation, you will need to create an administrator user with all the following responsibilities (or separate administrator users for each of the following responsibilities):

- **System Administrator**

  - Create and administer Oracle Applications users

  - Set and modify system profile options

  - Assigning or changing roles

- **HRMS Manager**

  - Create employees in the enterprise database (if Oracle HRMS is installed)

- **CRM Resource Manager**

  - Create employees in the enterprise database (if Oracle HRMS is NOT installed)

  - Import employees from the enterprise database as CRM resources

- **Call Center HTML Administration**

  - Manage multiple aspects of interaction center, including: ICSM, and UWQ Media Actions, assigning Interaction Center parameters (server group, middleware, etc.).

- **Oracle Marketing Campaign WorkBench SuperUser**

- Manage Oracle Marketing campaigns and campaign activities

- **Oracle Marketing Audience SuperUser**

  - Manage Oracle Marketing lists and target groups

- **Oracle Advanced Outbound Telephony Administrator**

  - Manage Oracle Advanced Outbound Telephony operations

- **Advanced Outbound Performance Monitor**

  - Monitor Call Center Performance

- **Interaction History**

  - Create outcome, result, and reason codes

- **Sales Online Super User**

  - Assign Agents to campaigns or campaigns to agents

As well, the administrator user must belong to a valid sales group to access certain tabs within the Oracle Marketing Application. The specifics of creating this group will be discussed in the Creating a Sales Group , page 5-9Topic.

Agent User

Agent users will typically have access to at least one Oracle business application, and many enterprises will require these users to be members of the enterprise database.

The Agent user must be assigned one or both of the following responsibilities:

- **TeleSales Agent**

  - Allows agent level access to Oracle TeleSales.

- **Collections Agent**

  - Allows agent level access to Oracle Advanced Collections

The agent user can be assigned to a resource group to eliminate the need to assign campaign activities to agents on an agent-by-agent basis. Instead, you can assign the appropriate agents to a resource group, then assign a campaign activity to the entire group. The specifics of creating a resource group are discussed in the Creating , page 5-10a Resource Group topic.

As well, there are specific agent user profile options that must be set before the agent can use either of the business applications. The configuration of these profile options is

discussed in the Setting User Profile Options for Outbound Telephony, page 5-14 topic.

There are six specific tasks associated with creating and administering users for Oracle Advanced Outbound Telephony:

- Creating an Employee in the Enterprise Database, page 5-4

- Creating a User and Linking the User to the Employee, page 5-6

- Creating a Sales Group, page 5-9

- Creating a Resource Group, page 5-10

- Importing a CRM Resource, page 5-11

- Setting User Profile Options for Oracle Advanced Outbound Telephony, page 5-14

Related Topics:

- Installing and Configuring the CTI Middleware, page 5-16

- Configuring TableSpaces in Your Database, page 5-20

- Implementing the Oracle Advanced Outbound Telephony Servers, page 5-21

- Setting up Oracle Customer Interaction History, page 5-31

- Setting up Oracle Marketing, page 5-33

- Configuring Sales Online, page 5-42

- Configuring Oracle Advanced Outbound Telephony, page 5-43

- Configuring Oracle Universal Work Queue, page 5-85

Creating an Employee in the Enterprise Database:

Enterprises using Oracle Human Resources Management Systems (HRMS) must create employees with this application. For enterprises not using HRMS as their human resources application, employees must be created using CRM Resource Manager.

Use this procedure to create an employee in Oracle Human Resource Management

Login

Self Service Login URL

Responsibility

<country> HRMS Manager (for example US HRMS Manager if in the United States)

Steps

1. Click **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 (select **Employee**)

   - Date of Birth

   - Social Security Number (if using US HRMS)

   - Employee (Number) - 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, click **Save**.

   You may close the People window.

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

Related Topics:

- Creating a User and Linking the User to the Employee, page 5-6

- Creating a Sales Group, page 5-9

- Creating a Resource Group, page 5-10

- Importing a CRM Resource, page 5-11

- Setting User Profile Options for Oracle Advanced Outbound Telephony, page 5-14

Creating a User and Linking the User to the Employee:

The process of creating Oracle Applications users includes the following tasks:

- Creating a user name - This user name will be used to log in to Oracle Applications (either the Self Service Login URL or the HTML Login URL).

- Linking the user to the employee created in the Creating an Employee in the Enterprise Database, page 5-4 topic.

- Setting a password for the user - A password is required in addition to a user name when logging in to Oracle Applications. The password you set in this procedure must be changed the first time you log in as the user you create.

- Assigning responsibilities to the user - The ability to perform tasks in the forms application depends on the responsibility you select. A responsibility is a level of authority in Oracle Applications that lets you access only those Oracle Applications functions and data appropriate to fulfill your role in an organization. In essence, a responsibility is a map that identifies a resource (user) and provides that resource with an association to specified functionality.

  Each responsibility allows access to:

  - A specific Oracle application or group of Oracle applications.

  - A set of books, such as U.S. Operations or German Sales or an organization, such as New York Manufacturing or New York Distribution.

  - A restricted list of windows to which you can navigate.

  - A restricted list of functions you can perform. For example, two responsibilities may have access to the same window, but one responsibility's window may have additional function buttons that the other responsibility's window does not have.

  - Reports in a specific application; your system administrator can assign groups of reports to one or more responsibilities, so the responsibility you choose determines the reports you can submit.

    Each user has at least one responsibility and several users can share the same responsibility.

Administrator Responsibility Matrix

Responsibility	Function
Oracle Advanced Outbound Telephony Administrator	Manage Oracle Advanced Outbound Telephony operations
Oracle Marketing Campaign WorkBench SuperUser	Manage Oracle Marketing campaigns and campaign activities
Oracle Marketing Audience SuperUser	Manage Oracle Marketing lists and target groups
Call Center HTML Administration	Manage multiple aspects of interaction center, including: ICSM, and UWQ Media Actions.
Advanced Outbound Performance Monitor	Monitor Call Center Performance
Interaction History JSP Admin	Create outcome, result, and reason codes
Oracle Marketing Administrator	Create custom target group priority levels
Sales Online Super User	Assign agents or resource groups to campaigns

Agent Responsibility Matrix

Responsibility	Function
TeleSales Agent	Permits agent level access to Oracle TeleSales
Collections Agent	Permits agent level access to Oracle Advanced Collections

Login

Self-Service Login URL (Forms)

Responsibility

System Administrator

Steps

1. Click **Security > User > Define**.

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

3. Click in the Person field.

   The Person Names dialog box appears.

4. In the Find field, type the name of the employee you created in the Creating an Employee in the Enterprise Database, page 5-4 topic and click **Find**.

   The search results appear in the field below the Find field. Since wildcard (%) searches are allowed, you may receive a long list of names depending on what you typed in the Find field.

5. Click the employee name you want from the results list.

   The Person field populates with the selected employee name.

6. In the Password field, type a password for the user account and then press **Tab**.

   This password is temporary. When you sign on as this user for the first time, the message "Your password has expired" appears and you are prompted to set a new password.

7. Type the password again to verify it.

8. In the Responsibilities tab, add the following responsibilities, as appropriate.

   • System Administrator

   • <country> HRMS Manager (for example: US HRMS Manager)

   • CRM Resource Manager

   • Oracle Advanced Outbound Telephony Administrator

   • Oracle Marketing Campaign WorkBench SuperUser

   • Oracle Marketing Audience SuperUser

   • Call Center HTML Administrator

9. From the File menu, select **Save**.

Related Topics:

- Creating an Employee in the Enterprise Database, page 5-4

- Creating a Sales Group, page 5-9

- Creating a Resource Group, page 5-10

- Importing a CRM Resource, page 5-11

- Setting User Profile Options for Oracle Advanced Outbound Telephony, page 5-14

Creating a Sales Group:

To access the tabs in Oracle Marketing, the administrator user to whom you want to grant Oracle Marketing access must belong to a valid sales group. This sales group must be assigned the **Sales Manager** sales role and a usage of **Sales and TeleSales**.

Use this procedure to create a sales group.

Login

Self-Service Login URL (Forms)

Responsibility

CRM Resource Manager

Steps

1. From the Navigator window, click **Maintain Resources > Groups**.

   The Define Groups window appears.

2. In the Name field, type a name for the sales group you are creating.

3. On the Define Groups window, click the **Roles** tab.

4. From the list in the Role Type field, select **Sales**.

5. From the list in the Role field, select **Sales Manager**.

6. Click the **Usages** tab.

7. From the list in the Usage field, select **Sales and TeleSales**.

8. Click the **Save** icon.

Related Topics:

- Creating an Employee in the Enterprise Database, page 5-4

- Creating a User and Linking the User to the Employee, page 5-6

- Creating a Resource Group, page 5-10

- Importing a CRM Resource, page 5-11

- Setting User Profile Options for Oracle Advanced Outbound Telephony, page 5-14

Creating a Resource Group:

Use this procedure to set up resource groups. Resource groups allow the assignment of multiple agents to a campaign activity without having to assign each agent individually.

You can have multiple employees in one group. An employee in a group with the role of manager automatically becomes the manager of the other employees in that group and of the employees in the groups below in the hierarchy.

> **Note:** You must not assign more than one employee with the role of Manager per group. Doing so will impact the reporting accuracy.

Use this procedure to create a resource group.

Login

Self-Service Login URL (Forms)

Responsibility

CRM Resource Manager

Steps

1. Click **Maintain Resources > Groups**.

    The Define Groups page appears.

2. In the Group Name field, type a name for your resource group.

3. Click the **Roles** tab.

4. From the list in the Role Type field, select **TeleSales** and **Collections** if this is a resource group for Oracle Advanced Collections agents, or select **TeleSales** if this is a resource group for Oracle TeleSales agents.

5. From the list in the Role Type field, select **TeleSales Agent** and **Collections Agent** for use with Oracle Advanced Collections, or select **TeleSales Agent** for use with Oracle TeleSales.

6. Click the **Usages** tab.

7. From the list in the Usage field, select **Sales and TeleSales** and **Collections** if this is a resource group for Oracle Advanced Collections agents, or select **Sales and TeleSales** if this is a resource group for Oracle TeleSales agents.

8. Click the **Save** icon.

Related Topics:

- Creating an Employee in the Enterprise Database, page 5-4

- Creating a User and Linking the User to the Employee, page 5-6

- Creating a Sales Group, page 5-9

- Importing a CRM Resource, page 5-11

- Setting User Profile Options for Oracle Advanced Outbound Telephony, page 5-14

Importing a CRM Resource:

Use the following procedure to import a CRM resource.

Login

Self-Service Login URL (Forms)

Responsibility

CRM Resource Manager

Steps

1. Click **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 CRM resource.

6. Click **Create Resource**.

   The Default Values window appears.

   > **Note:** Do not make any changes or add roles from this window. 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. 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. From the Resource window, click the **Roles** tab (if it is not already displayed).

12. In the Role Type field, select **Sales** from the list of values.

13. In the Role field, select **Sales Manager** from the list of values.

14. Click the **Save** icon.

15. From the Resource window, click the **Groups** tab.

16. In the Name field under Groups, select the group name you created in the Creating a Sales Group, page 5-9 topic.

17. Click in the Name field under Group Member Roles, and the field auto-populates with the Sales Manager role.

18. Click the **Save** icon.

19. From the Resource window, click the **Interaction Center** tab.

20. From the Interaction Center list, select the server group to which you want to assign this resource.

21. From the Middleware list, select the middleware you want to use.

    The values in this list will depend on which server group you selected from the Interaction Center list.

22. From the Parameter list, select **ACD Agent ID**.

23. In the Value field, type the extension number you want to assign to this resource.

    This number is configured at the switch level, consult your switch/ACD implementer for the extension numbers.

24. From the Middleware list (below the one you just used), select the middleware you want to use.

25. From the Parameter list (below the one you just used), select **ACD Agent Password**.

26. In the Value field (below the one you just used), type in the password for the extension you selected earlier.

    This password is set at the switch level, consult your switch/ACD implementer for the necessary password(s).

27. Click the **Save** icon.

Related Topics:

- Creating an Employee in the Enterprise Database, page 5-4

- Creating a User and Linking the User to the Employee, page 5-6

- Creating a Sales Group, page 5-9

- Creating a Resource Group, page 5-10

Setting User Profile Options for Oracle Advanced Outbound Telephony:

Profile options, in combination with the role and group to which each agent user is assigned, determine what information that user can view and modify.

This step only needs to be performed for agent users who will be logging in to Oracle E-Business applications, such as Oracle TeleSales and Oracle Advanced Collections.

Use the following procedure to set user profile options for outbound telephony.

Login

Self-Service Login URL (Forms)

Responsibility

System Administrator

Steps

1. Click **Profile > System**.

2. Specify the level or levels at which you wish to view or set profile option values.

   Typically, interaction center profile options are set for the Oracle Applications instance (for the purpose of profile options, this is also called the site). Then, if necessary, the profile options are modified for a user or a set of users working under a responsibility.

   • If you want to view or set profile options for all users at the installation site, select the Site box.

   • If you want to view or set profile options for users working under responsibilities owned by a specific application, select the Application box and then select an application from the Application list.

   • If you want to view or set profile options for users working under a specific responsibility, select the Responsibility box and then select a responsibility from the Responsibility list.

   • If you want to view or set profile options for a specific user, select the User box and then select a username from the User list.

3. If you want to display profile options that include a specific character string, type the characters in the Profile field.

You may search for profile options using character strings and the wildcard symbol (%). For example, to find profile options prefixed by "IEU", the product code for Oracle Universal Work Queue, enter IEU%.

4. Click **Find**.

    The System Profile Values window appears, displaying all of the profile options beginning with the character string you typed in the Profile field.

5. Set the values for the profile options at one or more levels.

    To use Oracle TeleSales as the business application, the following user profile options will need to be set to "Yes" if you want the user to have access to each of these queues:

    •   IEU: QUEUE: Oracle Advanced Outbound Telephony - allows user to log into the Oracle Advanced Outbound Telephony queue (required for Oracle Advanced Outbound Telephony use).

    •   IEU: QUEUE: Forecasts - allows user to view the Forecasts queue.

    •   IEU: QUEUE: Inbound Telephony - allows user to log into the Inbound queue to receive calls.

    •   IEU: QUEUE: Leads - allows users to view the Leads queue.

    •   IEU: QUEUE: Opportunities - allows users to view the Opportunities queue.

    •   IEU: QUEUE: Tasks - allows users to view the Tasks queue.

    To use Oracle Advanced Collections as the business application, the following user profile options will need to be set to "Yes" if you want the user to have access to each of these queues:

    •   IEU: Queue: Delinquencies

    •   IEU: Queue: Dunning

    •   IEU: Queue: Promises

    •   IEU: Queue: Quotes

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

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

   Your changes take effect as soon as the user signs on or changes responsibility. You may close the System Profile Values window.

Related Topics:

- Creating an Employee in the Enterprise Database, page 5-4

- Creating a User and Linking the User to the Employee, page 5-6

- Creating a Sales Group, page 5-9

- Creating a Resource Group, page 5-10

- Importing a CRM Resource, page 5-11

Installing and Configuring the CTI Middleware

To properly install and configure the CTI middleware for Oracle Advanced Outbound Telephony, you must perform the following tasks:

- Installing the CTI Middleware, page 5-16

- Configuring the CTI Middleware, page 5-18

Related Topics:

- Creating and Configuring Oracle Advanced Outbound Telephony Users, page 5-4

- Configuring TableSpaces in Your Database, page 5-20

- Implementing the Oracle Advanced Outbound Telephony Servers, page 5-21

- Setting up Oracle Customer Interaction History, page 5-31

- Setting up Oracle Marketing, page 5-33

- Configuring Sales Online, page 5-42

- Configuring Oracle Advanced Outbound Telephony, page 5-43

- Configuring Oracle Universal Work Queue, page 5-85

Installing the CTI Middleware:

Oracle Advanced Outbound Telephony supports two middleware products:

- Intel CT-Connect or

- Cisco ICM (Intelligent Call Manager)

The middleware configuration tells the Oracle Advanced Outbound Telephony Dial Server where the telephony adapter server is located and which Computer Telephony Integration (CTI) Server to use. The middleware also defines other telephony parameters used by the Dial Server (and Oracle Telephony Manager).

In most instances there will only be one CTI Server and one telephony adapter server in an interaction center environment, therefore only one middleware instance needs to be configured. However in a large interaction center, multiple telephony adapter servers are necessary for load balancing. Since it is not recommended to run multiple telephony adapter servers on the same machine, you will need a separate middleware configuration for each telephony adapter server.

> **Note:** Compatibility between Oracle Advanced Outbound Telephony and third party products, including Computer-Telephony Integration middleware and switches, is certified after testing with each release of these Oracle products. Each combination of a switch, the switch vendor's own software release, and each CTI middleware release, must be certified independently. While Cisco ICM and Dialogic CT-Connect are the two middleware products currently supported by Oracle Advanced Outbound Telephony, there are limitations on the certified combinations of phone switches, switch software, and CTI middleware with each version of these Oracle products.

> **Note:** The certification information changes with some frequency, as third parties add and drop products and versions, and as Oracle's certification process proceeds. Therefore, current certification information is maintained on a web site, accessible to Oracle sales and product development personnel and to Oracle partners.

> **Note:** Customers should always have their Oracle sales channel verify, from the web site, that the combination of phone switch, switch vendor software and version, switch configuration, CTI middleware software and version are compatible and supported, prior to making an implementation plan.

Related Topics:

- Configuring the CTI Middleware, page 5-18

Configuring the CTI Middleware:

The middleware should be configured in a server group and should be shared by all the Dial Servers in that server group. While it is possible to have more than one server group in an interaction center environment, there will most likely only be one, since you cannot share resources between different server groups.

Use the steps below to configure the CTI middleware.

Prerequisites

If there is only one telephony adapter server node, the middleware configuration should have already been accomplished in the Advanced Inbound installation and configuration process. Some parameters may have already been defined during the Advanced Inbound installation. However, additional Oracle Advanced Outbound Telephony parameters must be defined.

If there are multiple telephony adapter server nodes, then Middleware must be configured for each of the telephony adapter server nodes.

Login

HTML Login URL

Responsibility

Call Center HTML Administration

Steps

1. Click the **Call Center** tab.

2. Click the Middleware subtab.

3. In the Choose Server Group field, select the server group for which you want to configure middleware.

4. Click **Create**.

   The Middleware Details page appears.

5. In the Middleware Name field, type a name for your middleware.

   Record this name as you will need it when configuring the parameters for the Oracle Telephony Adapter Server.

6. From the list in the Middleware Type field, select **Connectors for Cisco ICM** or **Connectors for CT-Connect**.

7. Click **Update**.

   The Middleware Details page refreshes to display additional fields and a list of parameter fields for the middleware.

8. In the IP address field, type the IP address of the machine on which the telephony adapter server resides.

9. In the Port field, type the port number for your telephony adapter server.

10. In the provided parameter fields, enter the following parameters:

    - **PBX Name** - links logical identifier defined in CT Connect configuration to represent the CTI link between CT Connect and the switch.

    - **PBX Type** - PBX type. Choose:
      - Avaya Definity

      - Alcatel 4400

      - Ericsson MD110

      - Nortel Meridian or Symposium Call Center Server

      - Rockwell Spectrum

      - Siemens HICOM

    - **CTI Enabler Service IP Address** - IP address of the CT Connect server.

    - **Middleware Server Info 1 - 6** - Port numbers of the Cisco ICM CTI servers (Port A, B, C, etc.).

    - **Domestic Dialing Prefix** - Numeric prefix dialed when placing domestic calls.

    - **International Dialing Prefix** - Numeric prefix dialed for placing international calls.

    - **Outgoing Prefix** - Numeric prefix dialed to place an outside call. Check against the configuration of the PBX.

    - **Site Area Code** - The area code for the site where the PBX is located.

    - **Site Country Code** - The country code for the site where the PBX is located.

    - **Site Internal Number Length** - Sets the allowable number of digits for the internal number.

- **Use Oracle Advanced Outbound Telephony** - Indicates where the Oracle Telephony Adapter Server is being used for AO.

11. Click **Update**.

   The CTI middleware is created and configured.

Related Topics:

- Installing the CTI Middleware, page 5-16

Configuring TableSpaces in Your Database

Oracle Advanced Outbound Telephony generally requires larger tablespace sizes than the default values provide. Tablespace size is dependent on a number of factors, including: hard drive size, size of calling lists, system memory, and number of tablespaces defined. However, Oracle recommends utilizing around 100 megs per defined tablespace.

When tablespace size is too small, several errors can occur, including:

- If a target group stays in the 'Validating' status for an extended period of time, it is likely the case that validation has failed, but was unable to update the status to "Failed Validation". This usually occurs when there is a tablespace issue and the error message could not be logged. After the tablespace is increased, the target group will automatically resume validation.

- If you stop seeing new error messages (beyond a specific date) in the FND Logger, it is very likely that you need to extend your tablespace. This is especially true if you are running into other errors that cannot be explained since other parts of the application may be failing, but are unable to log the errors due to the tablespace issues.

Contact your DBA to adjust your tablespace sizes for Oracle Advanced Outbound Telephony. Also, if your DBA will allow it, Oracle recommends utilizing the autoextend feature.

Related Topics:

- Creating and Configuring Oracle Advanced Outbound Telephony Users, page 5-4

- Installing and Configuring the CTI Middleware, page 5-16

- Implementing the Oracle Advanced Outbound Telephony Servers, page 5-21

- Setting up Oracle Customer Interaction History, page 5-31

Implementing the Oracle Advanced Outbound Telephony Servers

This chapter includes steps for creating the Oracle Advanced Outbound Telephony Central and Dial servers, configuring their parameters, and starting or stopping them.

Related Topics:

Creating the Telephony Adapter Server and Configuring its Parameters:

Oracle Telephony Adapter Server (OTAS) is the intermediary between the telephony platform (PBX/ACD and CTI Middleware) and Oracle Advanced Inbound. OTAS is installed as part of the standard E-Business installation.

Follow the steps below to create the telephony adapter server and configure its parameters for Oracle Advanced Outbound Telephony.

Login

HTML Login URL

Responsibility

Call Center HTML Administration

Steps

1. Click **ICSM > Server Groups**.

   The Server Group List page appears.

2. From the list of server groups, click the server group to which you want to add the Oracle Telephony Adapter Server.

   The Server Group Details page refreshes to display information for the selected server group.

3. Click **Create**.

   The Server Details page appears.

4. In the Server Name field, type a name for the server you are creating.

5. If this server group is part of a Super Group, select the super group name from the list in the Using Server Group field.

6. From the list in the Default Node field, select the node for your server.

7. Click **Save**.

8. On the Server Details page, click **Parameters**.

   The Server Details page refreshes to display parameters fields for the selected server.

9. In the Database Logging field, type "true" or "false".

   The default value is "false".

   When database logging is turned on {true}, exceptions and error level messages are logged to the database and can be viewed in the Log Viewer page. Use database logging as a diagnostic tool only as logging will affect the performance of the system.

10. In the Middleware Configuration Name field, type the middleware name you used in the Configuring the CTI Middleware, page 5-18 topic.

11. In the Trace Level field, specify the type of messages logged to the trace file.

    Possible values are {fatal, error, warning, info, verbose}.

    The default trace level is error level messages only.

    > **Note:** This feature is very important for diagnosing issues and troubleshooting the server. Oracle recommends you set the trace level to **all**. For more information on trace file settings, refer to the Diagnostic and Troubleshooting section of this guide.

12. Click **Update**.

13. Click **Done**.

14. Once you have created the OTAS server, ICSM will generate an iecvdu.dll file in the ICSM/admin/script/lib directory. You should verify that the file is present in that directory.

Related Topics:

- Creating the AO Central Server and Configure its Parameters, page 5-23

- Creating the AO Dial Server and Configure its Parameters, page 5-26

- Starting and Stopping the Servers, page 5-30

Creating the AO Central Server and Configure its Parameters:

Follow the steps below to create the AO Central Server (OCS) and configure its parameters.

Prerequisites

ICSM must be installed and started, and you must have already defined a server group before you can create a Central Server or configure its parameters. These tasks should have been performed during the installation and implementation of Oracle ICSM. For more information, refer to the *Oracle Interaction Center Server Manager*.

Login

HTML Login URL

Responsibility

Call Center HTML Administration

Steps

1. Click the **ICSM** tab.

   The Server Group List page appears. This is the default page.

2. From the Server Group List page, select the server group in which the AO Central Server is defined by clicking hte appropriate hyperlinked server name.

   > **Note:** If the server group name is not listed, click the **Next** or **Last** hyperlinkslocated at the bottom of the page to view more server groups.

3. In the Server section, click **Create**.

   The Server Details page appears.

4. On the Server Details page, enter the server name, server type (use **Oracle Advanced Outbound Telephony Central Server**), location, description, member server group, using server group, and node assignment in the provided fields.

5. Click **Save**.

6. On the Server Details page, click **Parameters**.

   The Server Details page refreshes to display parameter fields for the selected server.

7. Define the following parameters:

   - AO Server Configuration Refresh Rate - The interval of time between OCS returning to the IEO schema to ensure that it is using the latest values for the server and plugin parameters. This value is given in minutes.

     Set value to: 15

   - AO Server Max Database Retries - The number of times the OCS server will attempt to connect to the database prior to stopping the server.

     Set value to: 5

   - AO Server Max Thread Count - The maximum number of threads the server will maintain in the thread pool. The number of threads can exceed this limit to 120% of this number, but once the threads have been used they are then destroyed.

     Set value to: at least 200

   - AO Server Max Trace File Size - This is the maximum file size in bytes of a trace file. Once a trace file hits the designated file size limit, a new trace file will be

created.

Oracle recommends you set this parameter to at least 10000000.

- OAO Log Level - The threshold value the logger will use to determine if a log request is forwarded to the log. Values for this parameter from least to most restrictive are:

  - **all** – this will ensure that all requests to log (except "debug") are forwarded.

  - **debug** – this will ensure that all requests to log are forwarded.

  - **info** – this will forward all log requests except debug level logs.

  - **warn** – this will forward all log requests except info and debug level logs.

  - **error** – this will only forward error and fatal level logs.

  - **fatal** – this will only forward fatal level logs.

  - **none** – nothing is logged.

    Set value to: **info**.

- OAO Server Version - Gives the current version of the OCS. This is given in the form of <major release>.<version>. At this time this is the level of specification.

  Default value: 11.5 If a value is not given then the server will disregard

- Report Generation Execution Interval - The interval of time between the Report Plugin attempting to execute the reporting methods. This parameter can be used to tune OCS. This value is given in minutes.

  Set value to: 15 If the value is set to 0 then the plugin will shutdown until the value is reset to a value above 0.

- Trace Level - The level at which the server trace function will provide information about server activity.

  Oracle recommends you set this value to **all**.

8. Click **Update**.

9. On the Server Details page, click **Advanced**.

   The Server Details page refreshes to display advanced parameters for the selected server.

10. In the Java Options field, type the following:

    -ms128m -mx256m -DAFLOG_MODULE=iec% -DAFLOG_ENABLED=FALSE

-DAFLOG_LEVEL=STATEMENT -DAFLOG_FILENAME=prs.log

The –ms and –mx VM parameters should be set depending on the number of agents you expect to service. These are the minimum and maximum values for the Virtual Machine. These values cannot be changed dynamically; you will need to restart the server for changes to take effect.

Oracle recommends you set these parameters to -ms128m -mx256m. Refer to the *Before You Begin* section of this guide, for information on what values to enter for these parameters.

The -DAFLOG_LEVEL parameter can have values (in increasing order of severity):

- STATEMENT

- PROCEDURE

- EVENT

- EXCEPTION

- ERROR

- UNEXPECTED

11. In the Server Arguments field, type the following:

    -AFLOG_ENABLED TRUE

12. Click **Done**.

Related Topics:

- Creating the Telephony Adapter Server and Configuring its Parameters, page 5-21

- Creating the AO Dial Server and Configure its Parameters, page 5-26

- Starting and Stopping the Servers, page 5-30

Creating the AO Dial Server and Configure its Parameters:

Use the steps below to create the AO Dial Server (AODS) and configure its parameters.

Prerequisites

ICSM must be installed and started, and you must have already defined a server group before you can create a Dial Server or configure its parameters. These tasks should have been performed during the installation and implementation of Oracle ICSM. For more information, refer to the *Oracle Interaction Center Server Manager*.

Login

HTML Login URL

Responsibility

Call Center HTML Administration

Steps

1. Click the **ICSM** tab.

    The Server Group List page appears. This is the default page.

2. From the Server Group List page, select the server group in which the AO Dial Server is defined.

3. In the Server section, click **Create**.

    The Server Details page appears.

4. On the Server Details page, enter the server name, server type (use **Oracle Advanced Outbound Telephony Dial Server**), location, description, member server group, using server group, and node assignment in the provided fields.

5. Click **Save**.

6. On the Server Details page, click **Parameters**.

    The Server Details page refreshes to display parameter fields for the selected server.

7. Define the following parameters:

    *   AO Server Configuration Refresh Rate - This is time in minutes that the server will go back to the database to see if any of the following configuration has been changed:

        *   If the server configuration has itself been changed (mainly loglevel).

        *   If a new campaign activity has now become active (and has at least one target group in executing state OR if a target group of this active campaign activityis now executing).

            Set value to: 15

    *   AO Server Max Database Retries - Number of times AODS server will attempt to connect to the database. It then increases the wait time and tries again.

        Set value to: 5

- AO Server Max Thread Count - Maximum number of threads server will maintain in the thread pool.

  Oracle recommends the following settings:

Number of Agents	Maximum Thread Count
50 or less	200
51 to 100	300
101 to 250	500
251 to 500	1000

- AO Server Max Trace File Size - This is the maximum file size in bytes of a trace file. Once a trace file hits the designated file size limit, a new trace file will be created.

  Oracle recommends you set this parameter to at least 10000000.

- OAO Log Level - Threshold value logger will use to determine if a log request is forwarded to the log. Values for this parameter are:
  - **all** – this will ensure that all requests to log (except "debug") are forwarded.

  - **debug** – this will ensure that all requests to log are forwarded.

  - **info** – this will forward all log requests except debug level logs.

  - **warn** – this will forward all log requests except info and debug level logs.

  - **error** – this will only forward error and fatal level logs.

  - **fatal** – this will only forward fatal level logs.

  - **none** – nothing is logged.

    If a value is not given then the server will default to info.

- OAO Server Version - Gives the current version of the AODS. This is given in the form of <major release>.<version>. At this time this is the level of specification.

  Set value to: 11.5

- Trace Level - The level at which the server trace function will provide information about server activity.

  Oracle recommends you set this to **all**.

  > **Note:** This feature is very important for diagnosing issues and troubleshooting the server. Oracle recommends you set the trace level to **all**. For more information on trace file settings, refer to the Diagnostic and Troubleshooting section of this guide.

8. Click **Update**.

9. On the Server Details page, click **Advanced**.

   The Server Details page refreshes to display advanced parameter fields for the selected server.

10. In the Java Options field, type the following:

    -ms128m -mx256m -DAFLOG_MODULE=iec% -DAFLOG_ENABLED=FALSE -DAFLOG_LEVEL=STATEMENT -DAFLOG_FILENAME=prs.log

    The –ms and –mx VM parameters should be set depending on the number of agents you expect to service. These are the minimum and maximum values for the Virtual Machine. These values cannot be changed dynamically; you will need to restart the server for changes to take effect.

    Oracle recommends you set these parameters to -ms128m -mx256m. Refer to the *Before You Begin* section of this guide, for information on what values to enter for these parameters.

    The -DAFLOG_LEVEL parameter can have values (in increasing order of severity):

    - STATEMENT

    - PROCEDURE

    - EVENT

    - EXCEPTION

    - ERROR

    - UNEXPECTED

11. In the Server Arguments field, type the following:

    -AFLOG_ENABLED TRUE

12. Click **Done**.

Related Topics:

- Creating the Telephony Adapter Server and Configuring its Parameters, page 5-21

- Creating the AO Central Server and Configure its Parameters, page 5-23

- Starting and Stopping the Servers, page 5-30

Starting and Stopping the Servers:
This topic group includes steps for starting and stopping the Oracle Advanced outbound servers.

Related Topics:

- Creating the Telephony Adapter Server and Configuring its Parameters, page 5-21

- Creating the AO Central Server and Configure its Parameters, page 5-23

- Creating the AO Dial Server and Configure its Parameters, page 5-26

Starting All Servers in a Server Group
Follow the steps below to start all the servers in a server group.

Login

HTML Login URL

Responsibility

Call Center HTML Administration

Steps

1. Click **ICSM > Server Groups**.

2. From the list of server groups, click the server group name of the server group in which the servers you want to start reside.

The Server Group Details page appears.

3. In the Server Group Details area, select **Start** and then click **Submit**.

It may take several minutes to start the server processes. To view the current status

during startup, refresh the browser several times.

As the server processes are starting up, "Starting" is displayed in the Stop/Start column. The status of each server process is displayed in the Servers area in the Status column.

Stopping All Servers in a Server Group

Follow the steps below to stop all servers in a server group.

Login

HTML Login URL

Responsibility

Call Center HTML Administration

Steps

1. Click **ICSM > Server Groups**.

2. From the list of server groups, click the server group name of the server group in which the servers you want to stop reside.

   The Server Group Details page appears.

3. In the Server Group Details area, select **Stop** and then click **Submit**.

   It may take several minutes to start the server processes. To view the current status during startup, refresh the browser several times.

   As the server processes are starting up, "Stopping" is displayed in the Stop/Start column. The status of each server process is displayed in the Servers area in the Status column.

Setting up Oracle Customer Interaction History

Oracle Customer Interaction History contains many seeded outcome, result, and reason codes. However, you can also create your own custom outcome, result, and reason codes, as well as your own outcome - result, and result - reason mappings.

Refer to the *Oracle Customer Interaction History Implementation Guide* for information and steps to perform the following tasks:

- Defining Outcome Codes

  > **Note:** Some telephony-related applications use Numeric Values,

which are recorded as the Versatility Code in database tables. Versatility Codes are used by version 3i of the following applications: Oracle TeleBusiness for Telecom/Utilities, Oracle TeleBusiness for Financial Services, Oracle Integration Manager, and Oracle Campaign Plus. If you do not use these earlier applications, you do not need to use Numeric Values.

- Defining result codes

- Defining reason codes

- Defining wrapups

- Associating wrapups to the Campaign Activity

    Note: When searching for the campaign codes, please note that campaign activities will have a description of CSCH.

    Note: The information contained in this section is the most current Oracle Marketing information available at the time this document was written. If the steps listed here are not matching up to what you are seeing in the Oracle Marketing application, please consult the Oracle Marketing documentation appropriate to the release of Oracle Marketing you have installed.

Related Topics:

Setting up Oracle Marketing

Functionality of Oracle applications is constantly improving and, thus, changing. The following procedures are therefore included in this document to provide a single location for Oracle Marketing administration information required for Oracle Advanced Outbound Telephony. However, Oracle Marketing functionality, user interface, requirements, and dependencies may change at any time. Therefore, Oracle Marketing procedures or information contained in the latest relevant Oracle Marketing product documentation, if different, should take precedence over the steps provided below.

This topic group includes the following topics:

- Defining Oracle Advanced Outbound Telephony List Source Types, page 5-33

- Creating a Custom Setup for Oracle Advanced Outbound Telephony Campaign Activities, page 5-34

- Creating an Oracle Marketing Campaign, page 5-36

- Creating an Oracle Marketing Campaign Activity, page 5-37

- Invoking the Concurrent Processor for Oracle Marketing List Generation, page 5-37

- Configuring an Oracle Marketing List, page 5-38

- Configuring an Oracle Marketing Target Group, page 5-41

- Associating a Call Script to a Campaign Activity, page 5-41

Defining Oracle Advanced Outbound Telephony List Source Types:

Concept: List Source Types, page 2-21

Oracle Advanced Outbound Telephony recycling algorithms and record filters are directly associated to source types because they define which fields are present in a target group.

> **Note:** By default, all attributes (or columns) associated with the seeded data source are active. While both Person and Organization list source types are seeded in Oracle Marketing, they are NOT defined in the database until this procedure is performed. It is crucial that you ensure your source types include all the fields required by Oracle Advanced Outbound Telephony and that they are defined in the database. A missing source type view will cause a failure in the validation process.

Follow the steps below to define the two required list source types for Oracle Advanced Outbound Telephony.

Responsibility:

Oracle Marketing Audience SuperUser

Steps:

To define the list source type attribute details, do the following:

- Select the Data Mining Details view within the Attributes mid-tab of a list source type.

- Check the "Use for Data Mining" column to select the appropriate attributes required for Oracle Advanced Outbound Telephony.

Verifying Your List Source Types are in the Database

You can run a SQL query to check your list source types (this query should be executed in a sqlplus session):

- SELECT VIEW_NAME

  FROM ALL_VIEWS

  WHERE VIEW_NAME IN ('AMS_TAR_PERSON_LIST_V',

  'AMS_TAR_ORGANIZATION_CONTACT_V')

  AND OWNER = 'APPS';

We expect the following two rows to be returned:

- AMS_TAR_ORGANIZATION_CONTACT_V

  AMS_TAR_PERSON_LIST_V

If no rows are returned by this query, then the views do not exist in the database.

Creating a Custom Setup for Oracle Advanced Outbound Telephony Campaign Activities:

This is an optional step that eliminates the need to approve every campaign activity before the campaign activity can be executed with Oracle Advanced Outbound Telephony.

When creating a campaign or campaign activity, you must specify a setup type for the campaign/campaign activity. Marketing Online seeds a setup type, called **Direct Marketing – Telemarketing**, for campaign activities to be executed through the Oracle Advanced Outbound Telephony channel. By default, this setup type requires an approval process.

To bypass the approval process, it is recommended another custom setup type be created, similar to the seeded Direct Marketing – Telemarketing setup type. However, you should leave the Budget Approval Process boxes unchecked when creating this custom setup type, this will eliminate the budget approval workflow process from

being started. This is not a mandatory procedure in the implementation process.

Responsibility:

Oracle Marketing Campaign WorkBench SuperUser

Steps:

When creating a custom setup you will associate the custom setup with a marketing object.

> **Note:** Depending on the marketing object selected, additional fields such as Channel Category and Channel may appear. This indicates that the custom setup is valid for the specific combination.
>
> The selection of channel category and channel determines the available component groups and menu items. For example, Direct Marketing - Email has a different set of component groups and menu items as compared to Direct Marketing – Telemarketing.
>
> The available combinations of channel category and channel in the Create Custom Setup page depend on the definition of the organization's channel categories and channels. In the case of Deliverables, the combination of channel category and channel is based on the parent and child category. Custom setups for campaign activities depend on the relationship of channel category and channel.
>
> - **Active:** Select it for the custom setup to be available for selection during a marketing object create.
>
> - **Allow Essential and Optional Grouping:** Select this check box if this custom setup can be used with the Side Navigation Look profile option.
>
> - **Suffix:** A suffix is used as part of the source code. The suffix set here is reflected when an object is created. The suffix can be alpha, numeric or a combination. The maximum number of characters is 3.

After the Custom Setup has been created, you need to configure it:

> **Note:** The combination of menu items displayed is based on the marketing object, channel, and channel category combination selected when creating the custom setup.
>
> - **Component Group:** Displays by default based on the marketing object, channel, and channel category selected for custom setup.
>
> - **Display Sequence:** Use this column to control the order of the marketing objects (as they appear in the side navigation menu). For

example, if Product is to appear on the side navigation menu directly below Main, Product should be sequentially numbered directly after Main. Main is not an optional setting and must be included. In this example, Main could be given a value of 10, and Product could be given a value of 11.

- **Available Attributes:** Use this column to indicate if the attributes for this object should be made available.

- **Essential:** To control the display order of a particular marketing object, place a check in the Essential check box (be sure to select the Essential check box that aligns with the correct marketing object). Anything not checked in the "Essential" column is considered " Optional" and is listed in alphabetical order.

- **Essential Display Sequence:** Display sequence is a numeric setting used to order marketing objects in side navigation menus. If the Essential check box is selected, numeric values provided enable the "Essential" marketing objects to be ordered appropriately. The Display Sequence column is used to determine the order when the " Business Process View" profile value is selected.

- **Reports:** Select this check box to enable attributes to be displayed in the portals.

Creating an Oracle Marketing Campaign:

Concept: Campaigns, page 2-16

> **Important:** When creating a campaign to be executed by Oracle Advanced Outbound Telephony, you will need to set the following values:

- Campaign Type: select **Campaign** if you are using Oracle TeleSales as your business application, or select **Collection** if you are using Oracle Collections as your business application.

- Setup Names: type **Campaigns** if you are using Oracle TeleSales as your business application, or type **Collection Campaign** if you are using Oracle Collections as your business application.

Responsibility:

Oracle Marketing Campaign WorkBench SuperUser

Steps:

For detailed information concerning the campaign creation process, please refer to the Creating and Using Campaigns chapter in the *Oracle Marketing User Guide*.

Creating an Oracle Marketing Campaign Activity:

Concept: Campaign Activities, page 2-16

> **Important:** When creating a campaign activity to be executed by Oracle Advanced Outbound Telephony, you must set the following values:
>
> - Setup Type - select **Direct Marketing - Telemarketing**
>
> - Use Parent Source Code - selecting this checkbox causes the campaign activity to default to the source type set at the campaign level (Person List or Organization List).
>
> - Do Not Use Trigger - select this option.

Prerequisites:

To create a campaign activity, a campaign must already exist.

Responsibility:

Oracle Marketing Campaign WorkBench SuperUser

Steps:

For detailed information concerning the campaign activity creation process, please refer to the Creating a Campaign Activity section in the *Oracle Marketing User Guide*.

Invoking the Concurrent Processor for Oracle Marketing List Generation:

This concurrent program needs to be running to generate Standard lists and change their list status to Available. Otherwise the list status will become stuck in Generating status. This process should only be performed once for each list.

Follow the steps below to invoke the concurrent processor to generate Oracle Marketing lists.

Login:

Self Service Login URL

Responsibility:

System Administrator

Steps:

1. Click **Concurrent > Requests**.

   The Find Requests dialog box appears.

2. On the Find Requests dialog box, click **Submit a New Request**.

   The Submit a New Request dialog box appears.

3. On the Submit a New Request dialog box, select **Single Request**, and click *OK*.

   The Submit Request dialog box appears.

4. From the list in the Name field, select **Workflow Background Process**, and click **OK**
   .

   The Parameters dialog box appears.

5. In the Item Type field of the Parameters dialog box, select **AMS: List Generation** and click **OK**.

6. Select values for the Process Deferred, Process Timeout and Process Stuck fields, and click **OK**.

7. In the At these Times… field, set when you want to run the process by clicking Schedule, selecting the appropriate time, and clicking **OK**.

8. Click **Submit**.

9. Click **Submit** to run the request.

Configuring an Oracle Marketing List:

Concepts:

• Importing Lists, page 2-18

• List Entries, page 2-19

• List Generation, page 2-19

• Lists, page 2-20

• List Regeneration, page 2-20

List configuration is a multi-step process that starts with the creation of a list in Oracle Marketing, which results in a list object — an empty container awaiting records. Thereafter, you must identify a record source, add the records to the list, and generate the list.

When Oracle Marketing creates a calling list, a verification of TCA should be performed to make sure that the customers on the calling list have not requested a preference not to be contacted. Checking against TCA requires the inclusion of a List type called Suppression list. When generating a target group for Oracle Advanced Outbound Telephony, two globally defined Suppression lists must be applied to ensure the

application of "Stop List":

1. Global Stop List - Do not phone

2. Global Stop List - Do not contact

The list configuration process includes the following tasks:

- Creating a List in Oracle Marketing, page 5-39

- Importing Record Sources Into Oracle Marketing, page 5-40

- Adding Record Sources to the Oracle Marketing List, page 5-40

- Generating the Oracle Marketing List, page 5-41

Creating a List in Oracle Marketing

Concept: Lists, page 2-20

> **Important:** When creating a list to be executed by Oracle Advanced
> Outbound Telephony, you must use the following values:
>
> - Source Type - Oracle Advanced Outbound Telephony only accepts
>   lists with a source type of **Persons**, or **Organization Contacts**.

Guidelines:

- List types are not enforced by all applications. Manual lists can have each list entry
  manually designated from existing records. For all other lists, including lists that
  will be populated by Oracle Discoverer workbook, use Standard. Suppression lists
  contain list entries that other lists can use to filter out or suppress, effectively
  creating a stop-list mechanism that can be used for various other lists. Suppression
  lists are generally not used as lists of contacts to execute a campaign.

- The two required source types for Oracle Advanced Outbound Telephony are
  Persons and Organization Contacts. A list source type is a concept used by Oracle
  Marketing to define how fields from the database (typically TCA) map to the
  columns of a target group entry. A target group entry has several hundred generic
  columns; a specific list source type, for example, could state that the phone number
  will go into column 1 and the name will go into column 2. However, a different list
  source type could populate the first column with name and the second column with
  phone number.

Responsibility:

Oracle Marketing Audience SuperUser

Steps:

For detailed information concerning the list creation process, please refer to the

Creating and Managing Lists section in the *Oracle Marketing User Guide*.

Importing Record Sources Into Oracle Marketing

Concept: Importing Lists, page 2-18

> **Important:** When importing record sources to be executed by Oracle
> Advanced Outbound Telephony, you must use the following values:
>
> Source File - Oracle Advanced Outbound Telephony only supports the
> following file types:
>
> - a .zip file containing one XML and one DTD file
>
> - a CSV file
>
> - a .zip file containing a CSV file

Responsibility:

Oracle Marketing Audience SuperUser

Steps:

For detailed information concerning the record source import process, please refer to
the Creating and Managing List Imports section in the *Oracle Marketing User Guide*.

Adding Record Sources to the Oracle Marketing List

Concepts:

- List Entries, page 2-19

- Lists, page 2-20

Guidelines:

- When designating an order for list selection, each record source in the list must
  contain a unique number. The lowest numbered record source will be used first.

- The first record source must be of type "include" so that records will be included in
  the list. Designate all record sources to include prior to designating record sources
  to exclude.

- If one of the list sources is a suppression list or another list of type "exclude,"
  designate this last in the list selection page, to ensure that records to be included
  will exist in the set from which exclusions are to occur.

Responsibility:

Oracle Marketing Audience SuperUser

Steps:

For detailed information concerning the process of adding record sources to Oracle Marketing lists, please refer to the Creating and Managing Lists section in the *Oracle Marketing User Guide*.

Generating the Oracle Marketing List

Concepts:

- List Entries, page 2-19

- List Generation, page 2-19

- List Regeneration, page 2-20

Responsibility:

Oracle Marketing Audience SuperUser

Steps:

For detailed information concerning the list generation process, please refer to the Generating Lists section in the *Oracle Marketing User Guide*.

Configuring an Oracle Marketing Target Group:

> **Important:** For Oracle Advanced Outbound Telephony to utilize a target group, it's list state must be set to locked. You accomplish this by generating the target group once you've added the generated lists to the target group.

Prerequisites:

Only generated lists should be added to a target group.

Responsibility:

Oracle Marketing Audience SuperUser

Oracle Marketing Campaign WorkBench SuperUser

Steps:

For detailed information concerning the target group creation and generation process, please refer to the Creating and Associating Target Groups section in the *Oracle Marketing User Guide*.

Associating a Call Script to a Campaign Activity:

This step is optional. You would only associate a call script with your campaign activity if you wanted to use Oracle Scripting with your outbound telephony campaign.

Use this procedure to associate a particular deployed Script Author script to a campaign activity for use in a business application. Thereafter, this association is applied to all users of the campaign activity.

> **Important:** For Oracle Advanced Outbound to utilize the call script, you must set the following values:
>
> • Type - select **Outbound Script**

Prerequisites:

• A valid campaign and campaign activity must be defined.

• At least one appropriate script must be deployed from the Script Author to the applications database.

• If custom code is referenced in the script, that code must be available to the Scripting Engine at runtime.

• You must know whether the script is an inbound or outbound script.

Responsibilities:

Oracle Marketing Campaign WorkBench SuperUser

Steps:

For detailed information concerning the process of associating call scripts to campaign activities, please refer to the Using Collaboration with Campaign Activities chapter in the *Oracle Marketing User Guide*

Configuring Oracle Sales

Before an Oracle Advanced Outbound Telephony campaign activity may be executed by an Oracle TeleSales or Oracle Collections agent, the TeleSales or Collections agent must be assigned to the campaign activity. This assignment allows the agent to view the campaign activity as a node on the agent's UWQ Outbound Telephony.

you make the agent to campaign activity association in Oracle Sales. You make this association in Oracle Sales.

Login:

Log into Oracle HTML-based applications

Responsibility:

Sales Administrator

Steps:

For detaied information on making the agent to campaign activity association, refer to the Setting Up Campaign Assignments chapter in the *Oracle TeleSales Implementation Guide*.

Configuring Oracle Advanced Outbound Telephony

This topic group includes the following topics:

- Setting the Server Time Zone, page 5-44

- Defining Time Zone Mapping Data, page 5-44

- Defining Calling Calendars, page 5-47

- Creating Holidays and Exceptions, page 5-56

- Assigning Holidays and Exceptions, page 5-58

- Creating Recycling Algorithms, page 5-59

- Adding Actions Performed if no Sub-Conditions Are Met, page 5-67

- Creating Record Filters, page 5-68

- Creating Validation Rules, page 5-71

- Configuring Campaigns for Interaction Center Execution, page 5-72

- Configuring Campaign Activity Details, page 5-74

- Configuring Inherited Campaign Activity Parameters, page 5-76

- Configuring Release Strategy Parameters, page 5-78

- Validating Campaign Activities, page 5-79

- Creating Campaign Activity Subsets, page 5-81

Related Topics:

- Creating and Configuring Oracle Advanced Outbound Telephony Users, page 5-4

- Installing and Configuring the CTI Middleware, page 5-16

- Configuring TableSpaces in Your Database, page 5-20

- Implementing the Oracle Advanced Outbound Telephony Servers, page 5-21

- Setting up Oracle Customer Interaction History, page 5-31

- Setting up Oracle Marketing, page 5-33

- Configuring Sales Online, page 5-42

- Configuring Oracle Universal Work Queue, page 5-85

Setting the Server Time Zone:

The server time zone is set at the site profile option level. The time zone is set once for all of the Interaction Center products. Changing the server time zone setting will affect all Oracle Interaction Center products.

Use the following steps to set your server time zone.

Login

Forms Login URL

Responsibility

System Administrator

Steps

1. Click **Profile > System**.

   The Find System Profile Values dialog box appears.

2. Search for and select the **Server Timezone** profile.

3. In the Site column, select the time zone you want, and click **OK**.

   The selected time zone appears in the Site column.

4. Click **Save**.

Defining Time Zone Mapping Data:

All calling target groups are validated before records can be dialed from the target group. As part of the validation process, the records within the target group must be mapped to a time zone, otherwise the records will be flagged as Do Not Use and will not be dialed. There are three different types of time zone mappings:

- Mapping a territory code to a time zone

- Mapping a territory code and area code to a time zone

- Mapping a territory code, area code and postal code to a time zone

As a rule, the use of territory code to time zone mapping requires the least amount of effort to create. However, certain countries are divided among different time zones, and

therefore require area code, along w/ territory code to map to a time zone. If area code is insufficient, then postal code may also be used, however the postal code only needs to be defined when absolutely necessary in order to correctly determine a time zone.

Oracle Advanced Outbound Telephony contains time zone mapping tables that must be defined.

> **Note:** It is the responsibility of the implementation team to populate the appropriate data into these tables. While Oracle Advanced Outbound Telephony provides the structure and mechanism to utilize this data, the data itself can be purchased through third party vendors.

Many countries only occupy a single time zone, but others are spread across multiple time zones. If your interaction center plans to make calls throughout countries (for example: United States or Canada) where many states and provinces fall in different time zones, you may need to provide the state/region postal codes and area codes to determine that Oracle Advanced Outbound Telephony is using the correct time zone for the customer. There are standard database load utilities readily available within the database that can be used to upload purchased data into the Oracle Advanced Outbound Telephony Schema.

In order to ensure that customers are called at the appropriate times, Oracle Advanced Outbound Telephony must know where the person resides in relation to time zones. This way Oracle Advanced Outbound Telephony can follow the appropriate telemarketing laws that govern calling in their particular country, state, country or city.

The time zone mapping form is used as an easy entry point to provide Oracle Advanced Outbound Telephony with a method to call customers or contacts.

At a minimum, the country code and time zone must be entered for each country that an interaction center will contact. It is mandatory that all countries map their time zone with their country name.

For single time zone countries, no further information is needed.

For countries with more than one time zone, it is recommended that you map the appropriate time zone, country code, and optional area code, postal code, state/region information to assist Oracle Advanced Outbound Telephony during list validation time. By utilizing the address specific information, Oracle Advanced Outbound Telephony can match a customer record with the appropriate time zone and country if their customer record is incomplete.

This functionality is especially important in countries where there are multiple time zones. For example, the United States has eight time zones spanning from Saipan, Northern Mariana Islands, U.S.A. (Standard time zone: UTC/GMT +10 hours where daylight savings time is currently not observed) to Honolulu, Hawaii, U.S.A. (Standard time zone: UTC/GMT -10 hours where daylight savings time is currently not observed). In addition, there are many states which have multiple time zones and may, or may not, participate in daylight savings time.

For example: the state of Indiana has up to three different time zones depending on the location in the state. In order to ensure we call the customer at the correct time, we need to know exactly where the customer is and follow the laws for their state. In this case, Oracle Advanced Outbound Telephony may need to go down to the postal code to ensure that the correct time zone is being used for the customer record.

Use the steps below to create a time zone mapping in Oracle Advanced Outbound Telephony.

Prerequisites

To create time zone mappings, your user account must be assigned the Oracle Advanced Outbound Telephony Administrator responsibility.

Login

HTML Login URL

Responsibility

Oracle Advanced Outbound Telephony Administrator

Steps

1. Click the **Administration** tab.

    The Administration tab appears, displaying the Server Properties subtab page. This is the default page for the Administration tab.

2. Click the **Time Zone Mappings** subtab.

    The Time Zone Mapping page appears, displaying a summary view table of all existing Time Zone mappings.

3. On the Time Zone Mapping page, click **Create Time Zone Mapping**.

    The Create Time Zone Mapping page appears.

4. In the Country Name field, click the flashlight icon.

    The Select a Country Name page appears.

5. From the list of country names, select the country name to which you want to map a time zone.

    The list in the Area Code field refreshes with all the area codes that have been defined for the selected country.

6. Optionally, from the list in the Area Code field, select an area code for the country

name you selected in the previous step.

7. Optionally, in the Postal Code field, type a postal code for the area code you selected in the previous step.

8. Optionally, in the State/Region Field, type the appropriate state/region for the area code.

> **Note:** The format for the state/region should be the entire state/region name with initial capitalization (for example, Nevada).

9. In the Time Zone field, click the flashlight icon.

The Select a Time Zone page appears, displaying a summary view table of all existing time zones.

10. From the Time Zone column of the summary view table, select the time zone to which you want to map the country code you selected.

11. Click **Create**.

The mapping between the selected country and time zone is created.

Defining Calling Calendars:

A calling calendar defines a set of callable times. Calendars can be associated to geographic locations (countries or regions) or marketing objects (campaign activities and target groups). Oracle Advanced Outbound Telephony utilizes three types of calendars:

- Country Calendar

- Region Calendars

- User Defined Calendar

This topic group contains the following topics:

- Creating Country Calendars, page 5-47

- Creating Region Calendars, page 5-50

- Creating User Defined Calendars, page 5-53

Creating Country Calendars

Country calendars consist of a baseline callable time range for all seven days of the week. Country calendars are expected to be created based on country-specific laws and are required for Oracle Advanced Outbound Telephony. Every list entry has one to

many contact points. Every contact point (telephone number) must have an associated country code and time zone. Every country code must have an associated calendar; thus, country calendars are applied at the individual record level. This association creates the base set of callable times for every list entry. Oracle Advanced Outbound Telephony ships with country calendars for many countries; however, additional country calendars can be created and added to the base product as necessary to meet your business needs.

Unlike user defined calendars, you cannot delete or remove country calendars. You can only create and modify country calendars.

Use the steps below to create country calendars in Oracle Advanced Outbound Telephony.

Prerequisite

To create country calendars, your user account must be assigned the Oracle Advanced Outbound Telephony Administrator responsibility.

Login

HTML Login URL

Responsibility

Oracle Advanced Outbound Telephony Administrator

Steps

1. Click the **Calling Calendars** tab.

   The Country Calendars page appears, displaying a list of all existing country calendars. The Country Calendars page is the default view for the Calling Calendars page.

2. On the Country Calendars page, click **Create Calendar**.

   The Create Country Calendar page appears.

3. In the Calendar Name field, type a name for the new country calendar.

   > **Note:** Calendar names have a 64 character limit and only the following characters are supported:

   - A-Z

   - 0-9

- underscore, space, and hyphen

4. From the list in the Country Name field, select the country you want to associate with the new country calendar.

5. You can create a country calendar by two different methods: you can copy and existing country calendar, or you can create a completely new country calendar. Click the appropriate radio button to select the method by which you will create the country calendar.

> **Note:** The option to create a country calendar by copying an existing calendar is only present when at least one country calendar already exists.

   1. To create a country calendar by using an existing country calendar as a model, select the **Copy Country Calendar** option and select the country you want to use from the list in the adjacent field.

   2. To create a completely new country calendar, select the **Create New Calendar** option.

6. Click **Create**.

   The Country Calendar Details page appears.

7. From the calendar, click the calendar region corresponding to the time you want the calendar to begin calling on the day you want to start calling (example - Monday at 9:00).

   The Calendar Region Details page appears.

8. From the View/Edit Calendar list, select **Edit Calendar Callable Regions**.

> **Note:** To open to the Calendar Region Details page, you can click anywhere in the calendar; however, by clicking the day and time you want to begin calling, you automatically populate the week day and start time fields in the Calendar Region Details page.

9. From the list in the Region Type field, select **Callable** if you want to add callable hours, or select **Not callable** if you want to add non-callable hours.

10. In the Start Time Hour and Minute fields, if the start time has not automatically defaulted to the time you want the country calendar to begin taking effect, select the hour and minute from the respective lists.

> **Note:** All times in the Hour field are displayed in 24 hour format (0:00 - 24:00). The Minute field allows you to select between **00** (on the hour) and **30** (on the half-hour) time increments.

11. In the End Time Hour and Minute fields, select the hour and minute from the respective lists. The end time is the time at which your country calendar will terminate calling.

12. In the Copy To area, select the days of the week to which you wish to copy this calling schedule (if any).

> **Note:** Copying the calling schedule in this way is not required; however, if your calling schedule will not vary greatly between days of the week, this method provides a quick means to populate a baseline calling calendar. You can always go back to the individual days and modify the specific calling times.

13. Click **Apply**.

The country calendar is created and you return to the Country Calendar Details page.

Related Topics:

- Creating Region Calendars, page 5-50

- Creating User Defined Calendars, page 5-53

Creating Region Calendars

Use the steps below to create region calendars in Oracle Advanced Outbound Telephony.

Prerequisite

The regions you want to create in Oracle Advanced Outbound Telephony must already have been defined in Oracle Marketing. You must use the area code mapping feature in the Oracle Advanced Outbound Telephony HTML Administration Console's Administration tab (Oracle Advanced Outbound Telephony Administrator responsibility) to map these regions to territory code/area code pairs.

Login

HTML Login URL

Responsibility

Oracle Advanced Outbound Telephony Administrator

Steps

1.   Click the **Calling Calendars** tab.

     The calling calendars page appears, displaying a list of all existing country calendars. The Country Calendars page is the default view for the Calling Calendars tab.

2.   Click the **Region Calendars** subtab.

     The Region Calendars page appears, displaying a list of all existing region calendars.

3.   On the Region Calendars page, click **Create Calendar**.

     The Create Region Calendar page appears.

4.   In the Calendar Name field, type a name for the new region calendar.

5.   From the Region Name list, select the appropriate region.

6.   You can create a region calendar by two different methods: you can copy an existing region calendar, or you can create a completely new region calendar.

     1.   To create a region calendar by using an existing region calendar as a model, click **Copy Region Calendar** and select the region calendar you want to use from the provided list.

     2.   To create a completely new region calendar, click **Create New Calendar**.

7.   Click **Create**.

     The Region Calendar Details page appears, displaying a calendar table with days of the week columns and hours of the day rows.

8.   From the View/Edit Calendar list, select **Edit Calendar Callable Regions**.

9.   From the calendar table, click the appropriate region corresponding to the time and day you want to start calling (example - Monday at 9:00).

     The Calendar Region Details page appears.

     > **Note:** To open to the Calendar Region Details page, you can click anywhere in the calendar; however, by clicking the day and time

you want to begin calling, you automatically populate the week day and start time fields in the Calendar Region Details page.

10. From the list in the Region Type field, select **Callable** if you want to add callable hours, or select **Not callable** if you want to override a callable region.

11. In the Start Time Hour and Minute fields, if the start time has not automatically defaulted to the time you want the region calendar to begin taking effect, select the hour and minute from the respective lists.

> **Note:** All times in the Hour field are displayed in 24 hour format (0:00 - 24:00). The Minute field allows you to select between **00** (on the hour) and **30** (on the half-hour) time increments.

12. In the End Time Hour and Minute fields, select the hour and minute from the respective lists. The end time is the time at which your region calendar will terminate and the default callable hours on the country calendar will resume.

13. In the Copy To area, select the days of the week to which you wish to copy this calling schedule (if any).

> **Note:** Copying the calling schedule in this way is not required; however, if your calling schedule will not vary greatly between days of the week, this method provides a quick means to populate a baseline calling calendar. You can always go back to the individual days and modify the specific calling times.

14. Click **Apply**.

The region calendar is created and you return to the Region Calendar Details page.

15. In the Override Country Calendar field, select **Yes**, or **No** from the list.

> **Note:** You must select **Yes** to execute the region calendar. If you select **No**, the region calendar will still be created, but it will not alter or expand upon the calling hours of the existing country calendar.

16. Click **Update**.

If you selected **Yes**, the Update Region Calendar Confirmation page appears, displaying a warning that overriding the country calendar will cause all users of this calendar to ignore any country specific restrictions, and you must click **Apply**

to complete the override. If you selected **No**, The Region Calendar Details page refreshes with the selected calling schedule.

Related Topics:

- Creating Country Calendars, page 5-47

- Creating User Defined Calendars, page 5-53

Creating User Defined Calendars

User Defined calendars are optional calendars which can be associated with either campaign activities or lists. These calendars are used to override information in the country calendar; however, user defined calendars don't automatically override country calendars. To begin overriding a country calendar, you must select **Yes** from the drop down list in the Override Country Calendar field on the User Defined Calendar Details page for the selected user defined calendar. These calendars allow you to specify calling times outside of the calling time parameters contained in the standard country calendar you are using.

For example, the default calling time in the country calendar you are using is 8AM to 9PM; however, you are only calling businesses and you know that nobody will be present after 6PM. You can create a User Defined calendar that adjusts the call time accordingly.

Use the steps below to create user defined calendars in Oracle Advanced Outbound Telephony.

Prerequisite

To create user defined calendars, your user account must be assigned the Oracle Advanced Outbound Telephony Administrator responsibility.

Login

HTML Login URL

Responsibility

Oracle Advanced Outbound Telephony Administrator

Steps

1. Click the **Calling Calendars** tab.

   The Country Calendars page appears, displaying a list of any existing country calendars. The Country Calendars page is the default view for the calling calendars

tab.

2. Click the **User Defined Calendars** subtab.

   The User Defined Calendars page appears, displaying a list of all existing user defined calendars.

3. On the User Defined Calendars page, click **Create Calendar**.

   The Create User Defined Calendar page appears.

4. On the Create User Defined Calendar page, type a name for the new user defined calendar.

5. You can create a user defined calendar by three different methods: you can copy and existing country calendar, you can copy and existing user defined calendar, or you can create a completely new user defined calendar. Select the appropriate option to choose the method by which you will create the user defined calendar.

   1. To create a user defined calendar by using an existing country calendar as a model, select the **Copy Country Calendar** option and select the country you want to use from the list in the field next to the radio button.

   2. To create a user defined calendar by using an existing user defined calendar, select the **Copy User Defined Calendar** option and select which existing user defined calendar you want to use from the list in the field next to the radio button.

   3. To create a completely new user defined calendar, select the **Create New Calendar** option.

6. Click **Create**.

   The User Defined Calendar Details page appears.

7. From the View/Edit Calendar list, select **Edit Calendar Callable Regions**.

8. From the calendar, click the calendar region corresponding to the time you want the calendar to begin calling on the day you want to start calling (example - Monday at 9:00).

   The Calendar Region Details page appears.

   > **Note:** To open to the Calendar Region Details page, you can click anywhere in the calendar; however, by clicking the day and time you want to begin calling, you automatically populate the week day and start time fields in the Calendar Region Details page.

9. From the list in the Region Type field, select **Callable** if you want to add callable hours to the default country calendar, select **Not callable** if you want to override a callable region on the country calendar, or click **Not specified** if you do not want to change the particular callable region on the country calendar.

10. In the Start Time Hour and Minute fields, if the start time has not automatically defaulted to the time you want the user defined calendar to begin taking effect, select the hour and minute from the respective lists.

> **Note:** All times in the Hour field are displayed in 24 hour format (0:00 - 24:00). The Minute field allows you to select between **00** (on the hour) and **30** (on the half-hour) time increments.

11. In the End Time Hour and Minute fields, select the hour and minute from the respective lists. The end time is the time at which your user defined calendar will terminate and the default callable regions on the country calendar will resume.

12. In the Copy To area, select the days of the week to which you wish to copy this calling schedule (if any).

> **Note:** Copying the calling schedule in this way is not required; however, if your calling schedule will not vary greatly between days of the week, this method provides a quick means to populate a baseline calling calendar. You can always go back to the individual days and modify the specific calling times.

13. Click **Apply**.

The user defined calendar is created and you return to the User Defined Calendar Details page.

14. In the Override Country and Region Calendars field on the User Defined Calendar Details page, select **Yes**, or **No** from the list.

> **Note:** You must select **Yes** to execute the user defined calendar. If you select **No**, the user defined calendar will still be created, but it will not alter or expand upon the calling hours of the existing country and region calendars.

15. Click **Update**.

The Update User Defined Calendar Conformation page appears, warning you that overriding the country calendar will cause all users of this calendar to ignore any country specific restrictions.

16. Click **Apply** to override the country calendar with the user defined calendar.

   The user defined calendar is created and you return to the User Defined Calendar Details page.

Related Topics:

- Creating Country Calendars, page 5-47

- Creating Region Calendars, page 5-50

Creating Holidays and Exceptions:

Use the steps below to create holidays or exceptions for use with calling calendars in Oracle Advanced Outbound Telephony.

Prerequisite

To create holidays or exceptions for use with calling calendars, your user account must be assigned the Oracle Advanced Outbound Telephony Administrator responsibility.

Login

HTML Login URL

Responsibility

Oracle Advanced Outbound Telephony Administrator

Steps

1. Click the **Calling Calendars** tab.

2. Click the **Holidays and Exceptions** subtab.

   The Holidays and Exceptions page appears, displaying a summary view table of all existing holidays and exceptions.

3. Click **Create Exception**.

   The Create Exception page appears.

4. In the Exception Name field, type a name for the holiday or exception you are creating.

5. In the fields provided in the Exception Type area, you can specify when you want the exception to occur. You can set an exception to happen on a given date each

year, on a given date once ever, or on a regularly occurring interval (example - first Monday in January).

1. To set the exception to occur on a specified date each year, click the top radio button, select the month from the list of months, and select the day from the list of days.

2. To set the exception to occur on a specified date once ever, click the middle radio button, select a month from the list of months, select a day from the list of days, and type a year in the final field.

3. To set the exception to happen at a regularly occurring interval, click the bottom radio button, select the interval time from the list in the first field, select the day of the week from the list in the middle field, and select the month from the list in the last field.

6. Click **Create**.

   The Holiday and Exception Details page appears, and you receive a confirmation message stating that your exception was successfully created.

7. From the list in the View/Edit Calendar field, select **Edit Holiday Callable Regions**.

   The Holiday and Exception Details page refreshes to allow you to click an exception region.

   > **Note:** To get to the Exception Region Details page, you can click any of the region times; however, by clicking that time you automatically populate start time fields in the Exception Region Details page.

8. From the Region Type list on the Exception Region Details page, select **Callable** if you want to change the designated time period to callable hours, or select **Not callable** if you want change the designated time period to non-callable hours.

9. In the Start Time Hour and Minute fields, if the start time has not automatically defaulted to the time you want to begin calling, select the hour and minute from the respective lists.

   > **Note:** All times in the Hour field are displayed in 24 hour format (0:00 - 24:00). The Minute field allows you to select between **00** (on the hour) and **30** (on the half-hour) time increments.

10. In the End Time Hour and Minute fields, select the hour and minute from the respective lists.

11. Click **Apply**.

The Holiday and Exception Details page refreshes to display a confirmation message stating that your exception was successfully created.

Assigning Holidays and Exceptions:

Use the steps below to assign holidays and exceptions to calendars in Oracle Advanced Outbound Telephony.

Prerequisite

To assign holidays and exceptions to calendars, your user account must be assigned the Oracle Advanced Outbound Telephony Administrator responsibility. The holiday or exception you want to assign to a calendar must have already been created.

Login

HTML Login URL

Responsibility

Oracle Advanced Outbound Telephony Administrator

Steps

1. Click the **Calling Calendars** tab.

2. Click the subtab for the appropriate calendar type.

   Your options are:

   • Country Calendar

   • Region Calendar

   • User Defined Calendar

3. In the Calendar Name column, click the hyperlinked calendar name for the calendar to which you want to assign a holiday or exception.

   > **Note:** If the calendar to which you want to assign a holiday or exception is the child of another calendar, click the plus sign (+) for the appropriate parent calendar. This expands the parent calendar to show all of its child calendars.

> **Note:** Now you can click the hyperlinked name of the child
> calendar.

The Calendar Details page appears for the selected calendar type.

4. From the side panel, click **Exception List**.

    The Holidays and Exceptions page appears, displaying a summary view table of any holidays and exceptions already assigned to the selected calendar.

5. Click **Assign Exception**.

    The Assign Exceptions to a Calendar page appears, displaying a summary view table of all existing holidays and exceptions.

6. In the Assign column, click the box for the exception you want to assign to the calendar.

7. Click **Update**.

    The Holidays and Exceptions page appears, displaying the newly assigned exception in the summary view table.

Creating Recycling Algorithms:

Recycling is the process of determining how to process records that have been dialed. When a record is returned, a user-definable recycling algorithm is executed, which looks at the record, the call results, and previous calls to the record.

When creating a recycling algorithm, you must first decide whether you will use an existing algorithm as a model for your new one, or whether you want to create a completely new algorithm. If an existing algorithm contains relatively similar pre or post-processing actions, conditions or sub-conditions, you should use it as a basis for your new algorithm. The Oracle Advanced Outbound Telephony HTML Administration console allows you to do this by permitting you to copy existing algorithms. If your new algorithm will be significantly different from any existing ones, you should create a completely new algorithm.

You must then add or modify pre or post-processing actions (not required), or the conditions or sub-conditions for the algorithm. You then need to add an action for each condition or sub-condition. These actions will determine how the record is handled if the condition or sub-condition under which you add it is met.

For more information about recycling conditions and actions, refer to the Recycling , page 2-30concept topic.

> **Note:** Each condition or sub-condition must have an associated action
> or you will receive an error.

There are two ways to create a recycling algorithm:

- by copying an existing recycling algorithm, page 5-60

- by creating a completely new recycling algorithm, page 5-61

You can also use the recycling shadow feature, add pre and post-processing actions, add conditions, or add actions performed if no sub-conditions are met to the algorithm:

- Adding Pre or Post-Processing Actions, page 5-63

- Adding Algorithm Conditions, page 6-57

- Adding Actions Performed if No Sub-Conditions Are Met, page 5-67

Creating Recycling Algorithms by Copying an Existing Algorithm

Use the steps below to create recycling algorithms by copying existing algorithms in Oracle Advanced Outbound Telephony.

Prerequisite

To create recycling algorithms, your user account must be assigned the Oracle Advanced Outbound Telephony Administrator responsibility.

Login

HTML Login URL

Responsibility

Oracle Advanced Outbound Telephony Administrator

Steps

1. Click **Algorithms > Recycling Algorithms**.

   The Recycling Algorithms page appears, displaying a list of all existing recycling algorithms. The Recycling Algorithm page is the default view for the algorithms page.

2. On the Recycling Algorithms page, click **Create Recycling Algorithm**.

   The Create Recycling Algorithm page appears.

3. In the Algorithm Name field, type a name for the new recycling algorithm.

   > **Note:** Algorithm names have a 64 character limit and only the

following characters are supported:

- A-Z

- 0-9

- underscore, space, and hyphen

4. Select the **Copy From Existing Algorithms** option.

5. From the lists in the provided fields, select the existing algorithm you want to copy and select the source type you want to use.

> **Note:** Source types define how fields from the database (typically TCA) map to the columns of a list entry.
>
> Oracle Advanced Outbound Telephony recycling algorithms are directly associated to source types because they define which fields are present in a list.
>
> Oracle Advanced Outbound Telephony supports two source types:
>
> - B to B - Business to Business (ORGANIZATION_CONTACT_LIST)
>
> - B to C - Business to Consumer (PERSON_LIST)

6. Click **Create**.

The new recycling algorithm is created.

The Recycling Algorithm Detail page appears, displaying a current and shadow view of the algorithm conditions.

Related Topics:

- Creating Completely New Recycling Algorithms, page 5-61

Creating Completely New Recycling Algorithms

Use the steps below to create completely new recycling algorithms in Oracle Advanced Outbound Telephony.

Prerequisite

To create recycling algorithms, your user account must be assigned the Oracle Advanced Outbound Telephony Administrator responsibility.

Login

HTML Login URL

Responsibility

Oracle Advanced Outbound Telephony Administrator

Steps

1. Click **Algorithms > Recycling Algorithms**.

   The Recycling Algorithms page appears, displaying a list of all existing recycling algorithms. The Recycling Algorithm page is the default view for the algorithms page.

2. On the Recycling Algorithms page, click **Create Recycling Algorithm**.

   The Create Recycling Algorithm page appears.

3. On the Create Recycling Algorithm page, type a name for the new recycling algorithm in the Algorithm Name field.

   > **Note:** Algorithm names have a 64 character limit and only the following characters are supported:
   >
   > • A-Z
   >
   > • 0-9
   >
   > • underscore, space, and hyphen

4. Select the **Create New Algorithm** option and from the list in the Select Source Type field, select the source type you want to use.

   > **Note:** Source types define how fields from the database (typically TCA) map to the columns of a list entry.
   >
   > Oracle Advanced Outbound Telephony recycling algorithms are directly associated to source types because they define which fields are present in a list.
   >
   > Oracle Advanced Outbound Telephony supports two source types:
   >
   > • B to B - Business to Business (ORGANIZATION_CONTACT_LIST)

- B to C - Business to Consumer (PERSON_LIST)

5. Click **Create**.

The new recycling algorithm is created.

The Recycling Algorithm Detail page appears, displaying the summary view of the algorithm conditions. Since this is a new algorithm, no existing pre or post-processing actions, or add algorithm conditions should be displayed.

Related Topics:

- Creating Recycling Algorithms by Copying an Existing Algorithm, page 5-60

Adding Pre or Post-Processing Actions

Recycling algorithms utilize pre and post-processing actions to determine what happens to records before and after (respectively) the conditions apply.

Use the steps below to add pre or post-processing actions to existing recycling algorithms in Oracle Advanced Outbound Telephony.

Prerequisite

To add pre or post-processing actions, your user account must be assigned the Oracle Advanced Outbound Telephony Administrator responsibility. You must also have an existing algorithm, to which you can add the pre or post-processing actions.

Login

HTML Login URL

Responsibility

Oracle Advanced Outbound Telephony Administrator

Steps

1. Click **Algorithms > Recycling Algorithms**.

The Recycling Algorithms page appears, displaying a list of all existing recycling algorithms. The Recycling Algorithm page is the default view for the algorithms page.

2. From the list of existing recycling algorithms, click the algorithm name of the algorithm to which you want to add pre or post-processing actions.

The Recycling Algorithm Detail page appears, displaying a summary view of all the existing pre and post-processing actions and all the existing conditions.

3. From the Recycling Algorithm Details page, click the **Pre-Processing Action(s)** link to add pre-processing actions, or click the **Post-Processing Action(s)** linkto add post-processing actions.

   The Edit Recycling Algorithm Action page appears, displaying a summary view table for pre or post-processing actions (depending on which link you clicked).

4. From the list in the Action column of the summary view table, select the action you want to add and click **Update**.

   > **Note:** Some actions require you to enter further information. The actions that require additional information have "**...**" after their name in the list. If the action you selected requires additional information, when you click **Update**, additional fields will appear, in which you need to enter information. Once you have entered the necessary additional information, click **Update**.

   The selected action is added and the summary view table refreshes to show the new action.

5. On the Edit Recycling Algorithm Action page, click the hyperlinked algorithm name.

   The Recycling Algorithm Detail page appears, displaying your new pre or post-processing action(s) in the shadow area.

6. If you are satisfied with your new pre or post-processing action(s), click **Replace**.

   The Recycling Algorithm Detail page refreshes to display the new pre or post-processing actions.

Adding Algorithm Conditions

Conditions and sub-conditions determine how the algorithm processes records that have been dialed. Conditions and sub-conditions are composed of three parts:

- A condition

- An operator

- A value

To avoid confusion, since the first component of the algorithm condition being added is also called a condition, we refer to the entire statement (condition, operator, and value) as a condition statement for the purposes of this guide. Condition statements are structured in the following order: *condition operator value.* For example: *STATUS contains*

ACTIVE (where *STATUS* is the condition, *contains* is the operator, and *ACTIVE* is the value), or: *HOUSEHOLD_SIZE greater than 3* (where *HOUSEHOLD_SIZE* is the condition, *greater than* is the operator, and *3* is the value).

The Oracle Advanced Outbound Telephony HTML Administration console displays conditions and their sub-conditions in a treeview model.

Example:

Condition 1

- Sub-condition 1

    Sub-condition 2

Condition 2

- Sub-condition 1

In the above example, Condition 1 and Condition 2 are top level conditions. If you want to have more than one expression in a single condition, it is very important how the expressions are joined (by AND or by OR).

If you want to have multiple top level conditions in your recycling algorithm, their order is very important. Once a condition is met, Oracle Advanced Outbound Telephony ignores all other conditions at the same level and only completes execution for the process within that condition block. In the above example, if Condition 1 is met, then Condition 2 (and Sub-condition 1 under Condition 2) will be ignored.

Use the steps below to add algorithm conditions (expressions) to existing recycling algorithms in Oracle Advanced Outbound Telephony.

Prerequisite

To add algorithm conditions, your user account must be assigned the Oracle Advanced Outbound Telephony Administrator responsibility. You must also have an existing algorithm, to which you can add the conditions.

Login

HTML Login URL

Responsibility

Oracle Advanced Outbound Telephony Administrator

Steps

1. Click **Algorithms > Recycling Algorithms**.

    The Recycling Algorithms page appears, displaying a list of all existing recycling

algorithms. The Recycling Algorithm page is the default view for the algorithms page.

2. From the list of existing recycling algorithms, click the algorithm name of the algorithm to which you want to add conditions.

   The Recycling Algorithm Detail page appears.

   > **Note:** If this is a new algorithm, the summary view will not contain any actions or conditions.

3. From the Recycling Algorithm Details page (Shadow area), click **Root**.

   The Recycling Algorithm Condition Details page appears, displaying two areas:

   - a Sub-Conditions area

   - an Actions performed if no sub-condition is met area

4. Under the Sub-Conditions heading, click **Insert Condition**.

   The Edit Recycling Algorithm Condition page appears, displaying a summary view table for algorithm conditions.

5. From the list in the Expression column, select the condition you want and click **Update**.

   The Expression column expands with additional fields, to allow you to enter the operator and value for the condition.

6. From the field directly after the condition statement, select the operator you want to use for your condition.

7. From the last field, select the value you want to use for your condition and click **Update.**

   The summary view table updates to show your new condition.

   > **Note:** If you want to add multiple expressions to the condition statement, repeat steps 5-7 in the next set of fields below the ones for your current expression, but remember to select how you want the expressions joined from the list in the Expressions Joined By field before clicking **Update**.

   > **Note:** If you want to add additional conditions, repeat steps 4-7 for each additional condition.

8. On the Edit Recycling Algorithm Condition page, click the hyperlinked algorithm name.

   The Recycling Algorithm Detail page appears, displaying your new condition(s) in the shadow area.

9. If you are satisfied with your new algorithm condition(s), click **Replace**.

   The Recycling Algorithm Detail page refreshes to display the new condition(s).

Adding Actions Performed if no Sub-Conditions Are Met

Use the steps below to add actions if no sub-conditions are met to existing algorithm conditions or sub-conditions in Oracle Advanced Outbound Telephony.

Prerequisite

To add actions if no sub-condition is met, your user account must be assigned the Oracle Advanced Outbound Telephony Administrator responsibility. You must also have an existing algorithm, to which you can add the actions.

Login

HTML Login URL

Responsibility

Oracle Advanced Outbound Telephony Administrator

Steps

1. Click **Algorithms > Recycling Algorithms**.

   The Recycling Algorithms page appears, displaying a list of all existing recycling algorithms. The Recycling Algorithm page is the default view for the algorithms page.

2. From the list of existing recycling algorithms, click the algorithm name of the algorithm to which you want to add conditions.

   The Recycling Algorithm Detail page appears, displaying a summary view of all the existing pre and post-processing actions and all the existing conditions.

   > **Note:** If this is a new algorithm, the summary view will not contain any actions or conditions.

3. From the Recycling Algorithm Details page, click **Root** (if you want to add actions to a top level condition), or click **Condition:** for the condition under which the

sub-condition to which you want to add an action resides.

The Recycling Algorithm Condition Details page appears, displaying two areas:

- a Sub-Conditions area

- an Actions if no sub-condition met area

4. Under the Actions if no sub-condition met field, click **Insert Action**.

The Edit Recycling Algorithm Action page appears, displaying a summary view table for actions.

5. From the Action column of the summary view table, select the action you want to add and click **Update**.

> **Note:** Some actions require you to enter further information. The actions that require additional information have "**...**" after their name in the list. If the action you selected requires additional information, when you click **Update**, additional fields will appear, in which you need to enter information. Once you have entered the necessary additional information, click **Update**.

The selected action is added and the summary view table updates to show the new action.

6. On the Edit Recycling Algorithm Action page, click the hyperlinked algorithm name.

The Recycling Algorithm Detail page appears, displaying your new action(s) in the shadow area.

7. If you are satisfied with your new algorithm action(s), click **Replace**.

The Recycling Algorithm Detail page refreshes to display the new action(s).

Creating Record Filters:

Record filters are filters against which records are checked at the point of release. Record filters are created and applied to lists. They are able to check fields of list entries. Record filters check release fields to ensure they match defined parameters (STATE equal to Virginia). A match here will prevent the release of the record.

Use the steps below to create record filters in Oracle Advanced Outbound Telephony.

Prerequisite

To create record filters, your user account must be assigned the Oracle Advanced Outbound Telephony Administrator responsibility.

Login

HTML Login URL

Responsibility

Oracle Advanced Outbound Telephony Administrator

Steps

1. Click the **Algorithms** tab.

    The Recycling Algorithms page appears, displaying a list of all existing recycling algorithms. The Recycling Algorithm page is the default view for the algorithms page.

2. On the Recycling Algorithms page, click the **Record Filters** subtab.

    The Record Filters page appears, displaying a list of the existing record filters.

3. On the Record Filters page, click **Create Record Filter**.

    The Create New Record Filter page appears.

4. In the Name field, type a name for the new record filter.

    > **Note:** Record filter names have a 64 character limit and only the following characters are supported:
    >
    > - A-Z
    >
    > - 0-9
    >
    > - underscore, space, and hyphen

5. In the Select Source Type field, select the source type you want to use.

    > **Note:** Source types define how fields from the database (typically TCA) map to the columns of a list entry.
    >
    > Oracle Advanced Outbound Telephony recycling algorithms are directly associated to source types because they define which fields are present in a list.
    >
    > Oracle Advanced Outbound Telephony supports two source types:
    >
    > - B to B - Business to Business (Organization Contacts)

- B to C - Business to Consumer (Persons)

> **Note:** You can click **Clear** to delete the algorithm name and selected source type.

6. Click **Next**.

   The Record Filter Rules page appears.

7. On the Record Filter Rules page, click **Insert Rule**.

   The Record Filter Create Rule page appears, displaying a summary view table for record filter conditions.

   > **Note:** If this is a new record filter, the summary view will not contain any record filters.

8. From the Field column, type the name of the record field against which you want to run the record filters.

9. From the Operator column, select the operator you want to use in your record filters from the list.

10. From the Value field, type the value you want to use for your record filters.

11. Click **Create**.

    The Record Filter Edit Rule page updates to display a confirmation note, stating that the record filter rule was created successfully.

12. If you want to add additional expressions to the same condition: repeat steps 8-11 in the next set of fields below the current expression, and click **Create**.

13. If you want to add additional conditions to the same rule:

    1. From the list in the Add field, select the number of additional conditions you want to add, and click **Go**.

       The Record Filter Create Rule page updates to display a second summary view table, in which you can create additional conditions for the record filter rule.

    2. Repeat steps 8-11 (in the new summary view table fields), and click **Create**.

14. Click **Done**.

    The Record Filter Rules page appears, displaying the new rule(s).

15. On the Record Filter Rules page, click the hyperlinked filter name.

    The Record Filter Details page appears, displaying your new record filter(s) in the shadow area.

16. If you are satisfied with your new record filter(s), click **Replace**.

    The Record Filter Details page refreshes to display the new record filter(s).

Creating Validation Rules:

Validation rules allow you to make exceptions to the automatic list validation process. For example, you can use validation rules when time zone information is omitted from the record you are calling or the time zone information cannot be determined from the database, but you know you will be dialing calls in a certain time zone. If the country code or time zone is not known these records will fail the list validation process and will not be dialed. You can set a validation rule to allow you to dial these records because you are confident of what is in the list. By doing this, you can prevent these calls from failing the list validation process, and thereby not being dialed.

For a complete list of the current validation rules and a description for each, refer to the Validation Rules concept.

Use the steps below to create validation rules in Oracle Advanced Outbound Telephony.

Prerequisite

To create validation rules, your user account must be assigned the Oracle Advanced Outbound Telephony Administrator responsibility.

Login

HTML Login URL

Responsibility

Oracle Advanced Outbound Telephony Administrator

Steps

1. Click the **Algorithms** tab.

   The Recycling Algorithms page appears, displaying a list of all existing recycling algorithms. The Recycling Algorithm page is the default view for the algorithms page.

2. Click the **Validation Rules** subtab.

The Validation Rules page appears, displaying a summary view table of all existing validation rules.

3. Click **Create Validation Rule**.

    The Create Validation Rule page appears.

4. In the Rule Name field, type a name for the validation rule and click **Create**.

    > **Note:** Rule names have a 64 character limit and only the following characters are supported:
    >
    > - A-Z
    >
    > - 0-9
    >
    > - underscore, space, and hyphen

    The Validation Rule Details page appears.

5. On the Validation Rule Details page, click **Insert Action**.

    The Edit Validation Rule Actions page appears, displaying a summary view table of all existing validation actions.

    > **Note:** If this is a new validation rule, the summary view will not contain any actions.

6. From the list in the action column, select the action you want to use for your validation rule, and click **Update**.

    > **Note:** Some actions require you to enter further information. The actions that require additional information have "**...**" after their name in the list. If the action you selected requires additional information, when you click **Update**, additional fields will appear, in which you need to enter information. Once you have entered the necessary additional information, click **Update**.

    The selected action is added and the summary view table updates to show the new action.

Configuring Campaigns for Interaction Center Execution:

The Campaigns page displays a list of campaigns set for execution in the interaction center. These campaigns are specified within Oracle Marketing (by a user with the Oracle Marketing Superuser responsibility). This page allows you to configure the

interaction center specific parameters for the selected campaign.

Use the steps below to configure campaigns for interaction center execution.

Prerequisite

To configure campaigns for interaction center execution, your user account must be assigned the Oracle Advanced Outbound Telephony Administrator responsibility. The campaign must have already been created in Oracle Marketing. For more information on creating campaigns, refer to *Oracle Marketing Concepts and Procedures*.

Login

HTML Login URL

Responsibility

Oracle Advanced Outbound Telephony Administrator

Steps

1. Click the Campaigns tab (if not already displayed).

   The Campaigns page appears, displaying a summary view table of All Campaigns (default view). The Campaigns page is the default page for the Oracle Advanced Outbound Telephony HTML Administration console. This page contains 2 seeded view settings:

   • My Campaigns - only displays campaigns created by your user account.

   • All Campaigns - allows you to view campaigns created by any user account.

     The "All Campaigns" view is the default view for this page, however, you can select the "My Campaigns"view from the list in the Select Search field, or create your own custom view. To create a custom search view, refer to the Creating , page 6-4Custom Searches topic.

2. From the Name column, click the hyperlinked name of the campaign you want to configure.

   The Interaction Center Campaign Details page appears.

3. Select the **CTI Disabled** box if you want to disable CTI for the selected campaign.

   > **Note:** The campaign cannot be set to CTI Disabled unless all of the campaign activities for the selected campaign are set to manual dialing mode.

4. Click **Update**.

    You receive a confirmation message that your campaign details have been successfully updated.

Configuring Campaign Activity Details:

The Campaigns page displays a list of campaigns that have been targeted for execution the interaction center. Each of these campaigns contain one or more campaign activities. These campaign activities are specified within Oracle Marketing (by a user with the Oracle Marketing Campaign WorkBench SuperUser responsibility). This page allows you to configure the interaction center specific parameters for the selected campaign activity.

Use the steps below to configure campaign activity details.

Prerequisite

To configure campaign activities for interaction center execution, your user account must be assigned the Oracle Advanced Outbound Telephony Administrator responsibility. The campaign and campaign activity must have already been created in Oracle Marketing. For more information on creating campaigns and campaign activities, refer to the *Oracle Marketing User Guide*.

Login

HTML Login URL

Responsibility

Oracle Advanced Outbound Telephony Administrator

Steps

1. Click the Campaigns tab (if not already displayed).

    The Campaigns page appears, displaying a summary view table of all active campaigns. The Campaigns page is the default page for the Oracle Advanced Outbound Telephony HTML Administration console. This page contains 2 seeded view settings:

    • My Campaigns - only displays campaigns created by your user account.

    • All Campaigns - allows you to view campaigns created by any user account.

      The "All Campaigns" view is the default view for this page, however, you can select the "My Campaigns"view from the list in the Select Search field, or create your own custom view. To create a custom search view, refer to the Creating ,

page 6-4Custom Searches topic.

2. From the Select Search list, select the search view you want.

3. From the Name column of the summary view table, click the name of the campaign activity you want to configure for interaction center execution.

   The campaign activity names are displayed directly under the campaign name for the campaign to which they are associated. The campaign activity name is indented from the campaign name.

   The Interaction Center Campaign Activity Details page appears.

4. From the Recycling Algorithm list, select the recycling algorithm you want the campaign activity to use.

5. Optionally, from the Record Filter list, select the record filter rule you want the campaign activity to use.

6. Optionally, from the Release strategy list, select the type of release strategy you want to use with the campaign activity.

   The two options are:

   • **Distribution** - which pulls a specified ratio of records from each campaign activity at the same priority level over time.

   • **Quota** - which releases a specified number of records. Quota will reset after a specified amount of time has passed.

   > **Note:** If you selected **Quota**, in the Quota field you must type the number of records to be released, then in the Quote Reset fields select the hour and minute reset period for the campaign activity. These fields specify the hours and minutes before the quota value is reset to zero (0).

7. Optionally, check the Inherit Parameters from Campaign box.

   If this box is checked, then the rest of the parameters on this page are inherited from the campaign to which the campaign activity is associated, you can click **Update** and you are done configuring the campaign activity parameters. Otherwise, continue on to the next step.

   Refer to the Configuring Inherited Campaign Activity Parameters, page 6-13 topic for steps to configure the inherited campaign activity parameters.

8. Optionally, from the list in the Calendar field, select the user defined calendar you want to associate with the campaign activity.

9. From the Dialing Method list, select the method of dialing you want to use with the campaign activity.

   For more information on dialing methods, refer to the Dialing Methods, page 2-17 topic.

   If you select Timed Preview dialing, you must type a number in the Preview Time field. This is the amount of time Oracle Advanced Outbound Telephony will wait before automatically dialing the record.

10. Optionally, from the Validation Rule list, select the validation rule you want to use for the campaign activity.

11. From the lists in the Reset Time fields, select the time of day reset period for the validation reports.

    This is the time (hour and minute) at which the validation reports on the Performance tab will reset.

12. Click **Update**.

    You return to the Interaction Center Campaign Activity Details page and you receive a confirmation note stating that the configuration was successful.

Configuring Inherited Campaign Activity Parameters:

The situation may arise where you have multiple campaign activities for a campaign. You may want all of those campaign activities to share the same parameters. Instead of configuring the same parameters over and over again for each campaign activity, Oracle Advanced Outbound Telephony allows you to configure campaign activity parameters in one location. Any campaign activity can then inherit these parameters, and changes made to these inherited parameters will affect ALL campaign activities in which the option to utilize inherited parameters has been selected.

Follow the steps below to configure the inherited campaign activity parameters.

Prerequisite

To configure inherited campaign activity parameters, your user account must be assigned the Oracle Advanced Outbound Telephony Administrator responsibility. The campaign must have already been created in Oracle Marketing. For more information on creating campaigns and campaign activities, refer to *Oracle Marketing Concepts and Procedures*.

Login

HTML Login URL

Responsibility

Oracle Advanced Outbound Telephony Administrator

Steps

1. Click the Campaigns tab (if not already displayed).

    The Campaigns page appears, displaying a summary view table of all active campaigns. The Campaigns page is the default page for the Oracle Advanced Outbound Telephony HTML Administration console. This page contains 2 seeded view settings:

    *   My Campaigns - only displays campaigns created by your user account.

    *   All Campaigns - allows you to view campaigns created by any user account.

        The "All Campaigns" view is the default view for this page, however, you can select the "My Campaigns"view from the list in the Select Search field, or create your own custom view. To create a custom search view, refer to the Creating Custom Searches, page 6-4 topic.

2. From the Select Search list, select the search view you want.

3. From the Name column of the summary view table, click a campaign name hyperlink.

    The Interaction Center Campaign Details page appears.

4. From the side panel, click the **Campaign Activities** hyperlink.

    The Interaction Center Campaign Activities page appears.

5. From the side panel, click the **Inherited Campaign Activity Parameters** hyperlink.

    The Interaction Center Inherited Campaign Activity Parameters page appears.

6. Optionally, from the list in the Calendar field, select the user defined calendar you want to associate with the campaign activity.

7. From the Dialing Method list, select the method of dialing you want to use with the campaign activity.

    For more information on dialing methods, refer to the Dialing Methods, page 2-17 topic.

    If you select Timed Preview dialing, you must type a number in the Preview Time field. This is the amount of time Oracle Advanced Outbound Telephony will wait before automatically dialing the record.

8. Optionally, from the Validation Rule list, select the validation rule you want to use for the campaign activity.

9. From the lists in the Reset Time fields, select the time of day reset period for the validation reports.

   This is the time (hour and minute) at which the validation reports on the Performance tab will reset.

10. Click **Update**.

   The Interaction Center Inherited Campaign Activity Parameters refreshes to display a confirmation message stating that the campaign activity has been successfully updated.

Configuring Release Strategy Parameters:

When using the distribution release strategy, Oracle Advanced Outbound Telephony pulls an indicated ratio of records from each campaign activity at the same priority level over time. Since the distribution strategy utilizes priority level and an indicated ratio number, you must set these in the Oracle Advanced Outbound Telephony HTML Administration console.

Use the steps below to set release strategy parameters.

Prerequisite

To set release strategy parameters, your user account must be assigned the Oracle Advanced Outbound Telephony Administrator responsibility. The campaign and campaign activity must have already been created in Oracle Marketing (for more information on creating campaigns and campaign activities, refer to the*Oracle Marketing User Guide*). The campaign activity must have at least one target group associated with it.

Login

HTML Login URL

Responsibility

Oracle Advanced Outbound Telephony Administrator

Steps

1. Click the Campaigns tab (if not already displayed).

   The Campaigns page appears, displaying a summary view table of all active campaigns. The Campaigns page is the default page for the Oracle Advanced

- My Campaigns - only displays campaigns created by your user account.

- All Campaigns - allows you to view campaigns created by any user account.

  The "All Campaigns" view is the default view for this page, however, you can select the "My Campaigns"view from the list in the Select Search field, or create your own custom view. To create a custom search view, refer to the Creating , page 6-4Custom Searches topic.

2. Optionally, from the Select Search list, select the search view you want.

3. From the Name column of the summary view table, click the name of the campaign you want to configure for interaction center execution.

   The Interaction Center Campaign Details page appears.

4. From the side panel, click the **Campaign Activities** hyperlink.

   The Interaction Center Campaign Activities page appears, displaying a summary view table of all the campaign activities associated with the selected campaign.

5. From the list in the Distribution Priority column, select the priority level you want the campaign activity to use.

   Priorities determine the relative priority of a campaign activity in comparison to other campaign activities. Campaign activities with a priority of Highest will be exhausted before Oracle Advanced Outbound Telephony moves on to campaign activities with a priority of High.

6. In the Distribution Weight field, type the number of records you want released from the campaign activity.

7. Click **Submit**.

   You return to the Interaction Center Campaign Activities page and you receive a confirmation message that the Campaign Activity has been successfully updated.

Validating Campaign Activities:

Use the steps below to validate a campaign activity in Oracle Advanced Outbound Telephony.

Prerequisite

To validate a campaign activity, you must be assigned the Oracle Advanced Outbound Telephony Administrator responsibility. A campaign and campaign activity must have been imported into Oracle Advanced Outbound Telephony from Oracle Marketing. The

status of the target group associated with the campaign activity must be set to "locked" via Oracle Marketing.

Login

HTML Login URL

Responsibility

Oracle Advanced Outbound Telephony Administrator

Steps

1. Click the Campaigns tab (if not already displayed).

   The Campaigns page appears, displaying a summary view table of all active campaigns. The Campaigns page is the default page for the Oracle Advanced Outbound Telephony HTML Administration console. This page contains 2 seeded view settings:

   - My Campaigns - only displays campaigns created by your user account.

   - All Campaigns - allows you to view campaigns created by any user account.

     The "All Campaigns" view is the default view for this page, however, you can select the "My Campaigns"view from the list in the Select Search field, or create your own custom view. To create a custom search view, refer to the Creating Custom Searches, page 6-4 topic.

2. From the Select Search list, select the search view you want.

3. From the Name column of the summary view table on the Campaigns page, click the name of the campaign containing the campaign activity you want to validate.

   The Interaction Center Campaign Details page appears.

4. From the side panel, click **Campaign Activities**.

   The Interaction Center Campaign Activities page appears, displaying a summary view table of all existing campaign activities associated to the selected campaign.

5. In the Action column for the campaign activity you want to validate, select one of the following:

   - **Validate Now** - runs validation on the campaign activity immediately

   - **Schedule Validation** - allows you to set a date and time at which validation will be run on the campaign activity

6. If you select **Validate Now**:

   1. Click **Submit**.

      The Interaction Center Campaign Activities page refreshes to display a confirmation message stating that the campaign activity has been updated successfully.

7. If you select **Schedule Validation**:

   The Campaign Activity Validation page appears.

   1. Select the Validate at a future time option.

   2. In the Date field, use the calendar tool to select a date at which validation will run.

   3. In the adjacent lists, select a time (hour and minute) at which validation will run one the selected date.

   4. Click **Schedule Validation**.

      The Campaign Activity Validation page refreshes to display a confirmation message stating that validation has successfully been scheduled.

   5. Click **Done**.

Creating Campaign Activity Subsets:

Use the steps below to create campaign activity subsets in Oracle Advanced Outbound Telephony.

Prerequisite

To create campaign activity subsets, your user account must be assigned the Oracle Advanced Outbound Telephony Administrator responsibility. A campaign and campaign activity must have been imported into Oracle Advanced Outbound Telephony from Oracle Marketing.

Login

HTML Login URL

Responsibility

Oracle Advanced Outbound Telephony Administrator

Steps

1. Click the Campaigns tab (if not already displayed).

    The Campaigns page appears, displaying a summary view table of all active campaigns. The Campaigns page is the default page for the Oracle Advanced Outbound Telephony HTML Administration console. This page contains 2 seeded view settings:

    - My Campaigns - only displays campaigns created by your user account.

    - All Campaigns - allows you to view campaigns created by any user account.

        The "All Campaigns" view is the default view for this page, however, you can select the "My Campaigns" view from the list in the Select Search field, or create your own custom view. To create a custom search view, refer to the Creating , page 6-4Custom Searches topic.

2. From the Select Search list, select the search view you want.

3. From the Name column of the summary view table on the Campaigns page, click the name of the campaign under which the campaign activity for which you want to create subsets resides.

    The Interaction Center Campaign Details page appears.

4. From the side panel, click **Campaign Activities**.

    The Interaction Center Campaign Activities page appears, displaying a summary view table of all existing campaign activities associated to the selected campaign.

5. From the Activity Name column of the summary view table, click the name of the campaign activity for which you want to create subsets.

    The Interaction Center Campaign Activity Details page appears.

6. From the side panel, click **Campaign Activity Subsets**.

    The Interaction Center Campaign Activity Subsets page appears, displaying a summary view table of all existing subsets for the selected campaign activity.

7. Click **Create Subset**.

    The Create Subset page appears.

8. In the Subset Name field, type a name for the new subset.

    > **Note:** Subset names have a 64 character limit and only the following characters are supported:

- A-Z

- 0-9

- underscore, space, and hyphen

9. Optionally, from the Priority list, select the priority you want to assign the subset.

> **Note:** Priorities determine the relative order of a subset in comparison to other subsets. It is similar to campaign activity priority however applied at a subset level.

> Subset priority provides the ability to define the order in which the outbound campaign manager will check to determine if records are available for the release. Campaign activity priority order will be examined first, then within the selected campaign activity, the subset priority will be examined to determine the subset from which a record is to be selected.

> Highest through Medium level priorities are preemptive; all campaign activity subsets with priorities in this range will be exhausted in priority sequence before the next priority level is used. Low and Lowest priorities are used in round-robin fashion; each of these campaign activity subsets will release its quantum of records, then the next campaign activity subset in the same priority level will be used.

10. Optionally, from the Release Strategy list, select a release strategy to use with the subset.

> **Note:** Subset release strategy is similar to campaign activity release strategy however applied at a subset level. The release strategy influences the number of records to be released from a subset.

> The distribution release strategy pulls a specified ratio of records from each campaign activity of the same priority level over time.

> The quota release strategy stops releasing records from a campaign activity or subset when a pre-defined limit has been reached. This strategy disburses records from a campaign activity or subset based on the quota that is assigned to the campaign activity or subset.

11. In the Quantum field, type the number of records you want to set as your limit.

The quantum number is the number of records from each subset that are released

before moving on to the next subset in the campaign activity.

12. If you selected a **Quota** release strategy, you must:

    1. In the Quota field, type the number of records to be released

    2. In the Quota Reset Hour and Minute fields, select the hour and minute reset period for the campaign activity. These fields specify the hours and minutes before the quota value is reset to zero (0).

13. Click **Next**.

    The Create Campaign Activity Subset Selection Criteria page appears, displaying a summary view table for selection criteria conditions.

14. In the Field column, type the name of the field you want to use as the condition for the selection criteria.

    > **Note:** If you are not sure of the field name, you can click the search icon (flashlight). Doing so will open the Select a Field page, in which you can search for and select a field name.

15. From the list in the Operator column, select the operator you want to use for your subset condition.

16. In the Field Value column, type the value you want to use for your subset condition.

17. To test how many records this condition will pull from the campaign activity, click **Test**.

18. Click **Create Subset**.

    > **Note:** If you want to add multiple conditions to the condition statement, repeat steps 14-18 in the next set of fields below the ones for your current condition, but remember to select how you want the conditions joined from the list in the Join Condition field before clicking **Create Subset**.

    The Interaction Center Campaign Activity Subsets page appears, displaying the new subset in the summary view table.

19. To activate/deactivate the subset:

    1. In the Activate/Deactivate column, click **Activate** or **Deactivate** (depending on the current status of the subset).

2. Click **Update**.

Configuring Oracle Universal Work Queue

What you are doing in this task is configuring Oracle Universal Work Queue to launch the desired Oracle business applications desktop interface. To do so, you select seeded classifications. These classifications are mapped to an application window or interface based on a particular media type. When an agent is requests delivery of that media type, the mapped business application is launched.

This setup is necessary to configure the application that needs to be popped, or launched, for an outbound media item. To configure a media screen pop for the UWQ Desktop, you must configure the media actions for Oracle Advanced Outbound Telephony.

Use the steps below to configure the UWQ media actions for Oracle Advanced Outbound Telephony.

Login

HTML Login URL

Responsibility

Call Center HTML Administration

Steps

1. Click the **UWQMedia Action** tab.

The Media Classification Action Association page appears.

2. From the drop-down list in the Media Type column, select **Oracle Advanced Outbound Telephony**.

3. In the Classification column, type **Campaign** to associate to outbound TeleSales, or type **Collection** to associate to outbound Collections.

4. From the drop-down list in the Media Action column, select the Oracle application you want to launch.

- If you typed **Campaign** in the Classification column (step 3), then select **TeleSales Outbound Telephony function**.

- If you typed **Collection** in the Classification column (step 3), then select **Outbound Collections Telephony function**.

5. Click **Update**.

   For more information and detailed steps setting up the media actions for Oracle Advanced Outbound Telephony, refer to the *Oracle Universal Work Queue Implementation Guide*.

Related Topics:

- Creating and Configuring Oracle Advanced Outbound Telephony Users, page 5-4

- Installing and Configuring the CTI Middleware, page 5-16

- Configuring TableSpaces in Your Database, page 5-20

- Implementing the Oracle Advanced Outbound Telephony Servers, page 5-21

- Setting up Oracle Customer Interaction History, page 5-31

- Setting up Oracle Marketing, page 5-33

- Configuring Sales Online, page 5-42

- Configuring Oracle Advanced Outbound Telephony, page 5-43

6

Administration Tasks

This chapter covers the following topics:

- Campaigns and Campaign Activities
- Campaign Activity Management
- Recycling Algorithms
- Record Filters
- Validation Rules
- Country Calendars
- Region Calendars
- User Defined Calendars
- Performance
- Administration

Campaigns and Campaign Activities

Use the Campaigns page to view, configure, and modify your campaigns and campaign activities.

Tasks

You can perform the following tasks:

- Viewing and Sorting Items, page 6-2
- Creating Custom Views, page 6-4
- Removing Custom Views, page 6-6
- Filtering Campaign and Campaign Activity Search Results, page 6-7

- Configuring Campaigns for Interaction Center Execution, page 6-9

- Configuring Campaign Activity Details, page 6-10

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- Viewing Validation History, page 6-27

- Creating Campaign Activity Subsets, page 6-29

- Modifying Campaign Activity Subsets, page 6-33

- Removing Campaign Activity Subsets, page 6-37

- Using the Subset Load Priority Feature, page 6-39

- Using the Subset Shadow Feature, page 6-41

Viewing and Sorting Items:

There are six tabs in the Oracle Advanced Outbound Telephony HTML Administration console, including: Campaigns, Algorithms, Calling Calendars, Telephony, Performance, and Administration. Many of these pages contain subtab menus.

Use the steps below to view or sort the contents of a selected page in the Oracle Advanced Outbound Telephony HTML Administration console.

Prerequisite

To access the Oracle Advanced Outbound Telephony HTML Administration console, your user account must be assigned the Oracle Advanced Outbound Telephony Administrator responsibility.

Login

HTML Login URL

Responsibility

Oracle Advanced Outbound Telephony Administrator

Steps

1. From the Oracle Advanced Outbound Telephony HTML Administration console, click the tab you want to view.

   The selected page appears, displaying a summary view table of its contents.

2. Click the subtab menu item you want to view (if other than the default).

   The selected subtab menu item's page appears, displaying a summary view table of its contents.

   > **Note:** The Oracle Advanced Outbound Telephony HTML Administration console always defaults to the first subtab's contents.

3. If there are more items than can fit in the page, click **First**, **Previous**, **Next**, or **Last** to continue viewing the items.

4. Click the column header by which you want to sort the contents of the summary view table.

   > **Note:** You can sort the summary view table items in either ascending or descending order by clicking any of the underlined column headers.

   A blue sort arrow appears to the right of the column heading. This arrow indicates whether you are sorting in ascending or descending order.

5. Click the arrow to reverse the sort order.

Related Topics:

- Creating Custom Views, page 6-4

- Filtering Campaign and Campaign Activity Search Results, page 6-7

- Configuring Campaigns for Interaction Center Execution, page 6-9

- Configuring Campaign Activity Details, page 6-10

- Validating Campaign Activities, page 6-18

- Searching for a Target Group Entry, page 6-22

- Viewing Validation History, page 6-27

- Creating Campaign Activity Subsets, page 6-29

- Using the Subset Load Priority Feature, page 6-39

- Using the Subset Shadow Feature, page 6-41

Creating Custom Views:

The Campaigns page has two seeded views:

- "All Campaigns" - is the default view for this page. This view allows you to view campaigns created by any user account.

- "My Campaigns" - This view only displays campaigns created by your user account.

You can also create custom views that allow you to view campaigns or campaign activities in virtually any manner.

Use the steps below to create a custom search view.

Prerequisite

To create custom views, your user account must be assigned the Oracle Advanced Outbound Telephony Administrator responsibility.

Login

HTML Login URL

Responsibility

Oracle Advanced Outbound Telephony Administrator

Steps

1. Click the Campaigns tab (if not already displayed).

   The Campaigns page appears, displaying a summary view table of All Campaigns (default view).

2. Click the **Create/Modify Search** hyperlink.

   The Campaign Searches page appears.

3. Click **Create New Search**.

   The Campaign Search page appears.

4. In the Search Name field, type a name for your custom search.

   > **Note:** The name you choose should reflect the type of custom search you are creating. For example, if you are creating a search that displays all campaigns with a status of "Active," you should use a search name like "All Active" or "Active Campaigns."

5. Type information in the appropriate fields or select items from the appropriate lists depending on the type of custom search you are creating.

   For example, if you were creating a custom search view to display all campaigns with a status of Active, you would select Active from the Campaign Statuses list. If you wanted to extend the search view to include all campaign activities with a status of Active, you would also select Active from the Campaign Activity Statuses list.

6. Click **Save Search**.

   You receive a confirmation message that the campaign search has been successfully created.

7. Click **Done**.

   You return to the Campaign Searches page and your new custom search is displayed in the summary view table.

   When you return to the Campaigns page, you can now select your custom search view from the Select Search list.

Related Topics:

- Validating Campaign Activities, page 6-18

- Generating a Validation Report, page 6-20

Removing Custom Views:

Use the steps below to remove a custom view.

Prerequisite

To remove custom views, your user account must be assigned the Oracle Advanced Outbound Telephony Administrator responsibility.

Login

HTML Login URL

Responsibility

Oracle Advanced Outbound Telephony Administrator

Steps

1. Click the Campaigns tab (if not already displayed).

    The Campaigns page appears, displaying a summary view table of All Campaigns (default view).

2. Click the **Create/Modify Search** hyperlink.

    The Campaign Searches page appears.

3. In the Remove column, select the box corresponding to the campaign search you want to remove.

4. Click **Update**.

    You receive a confirmation message that the selected campaign search has been deleted.

5. Click **Done**.

    You return to the Campaigns page.

Related Topics:

- Viewing and Sorting Items, page 6-2

- Creating Custom Views, page 6-4

- Filtering Campaign and Campaign Activity Search Results, page 6-7

- Configuring Campaigns for Interaction Center Execution, page 6-9

- Configuring Campaign Activity Details, page 6-10

- Configuring Inherited Campaign Activity Parameters, page 6-13

- Setting Release Strategy Parameters, page 6-16

- Validating Campaign Activities, page 6-18

- Generating a Validation Report, page 6-20

- Searching for a Target Group Entry, page 6-22

- Modifying a Target Group Entry, page 6-24

Filtering Campaign and Campaign Activity Search Results:

Oracle Advanced Outbound Telephony allows you to create custom campaign searches to filter through all of the campaigns and campaign activities targeted for interaction center execution; however, even with this level of filtering, the need to further filter the results might exist.

With Oracle Advanced Outbound Telephony, you can use the Find feature to further filter your campaign search results. This feature allows you to filter through the campaign search results by the following three criteria:

- a specified campaign name

- a specified campaign activity name

- a specified source code

Use the steps below to filter your campaign or campaign activity views.

Prerequisite

To use the find feature to further filter campaign search views, your user account must be assigned the Oracle Advanced Outbound Telephony Administrator responsibility.

Login

HTML Login URL

Responsibility

Oracle Advanced Outbound Telephony Administrator

Steps

1. Click the Campaigns tab (if not already displayed).

   The Campaigns page appears, displaying a summary view table of All Campaigns (default view).

2. From the Select Search list, select the campaign search view you want to use.

   The Campaigns page refreshes to display the results of the selected campaign search.

3. From the list in the Find field, select how you want to further filter your results.

   The following three criteria are available:

   • Campaign Name

   • Campaign Activity Name

   • Source Code

4. In the adjacent field, search for and select the information by which you want to filter the campaign search view. You can use wildcard searches if you only know a partial name or source code.

   For example, you want to search for a campaign of a particular name, but the only information you have is that the name starts with an "A", you can type A% in the field and click search (flashlight icon).

   The Campaigns page refreshes to display your filtered results.

Related Topics:

- Setting Release Strategy Parameters, page 6-16

- Validating Campaign Activities, page 6-18

- Generating a Validation Report, page 6-20

Configuring Campaigns for Interaction Center Execution:

The Campaigns page displays a list of campaigns set for execution in the interaction center. These campaigns are specified within Oracle Marketing (by a user with the Oracle Marketing Campaign WorkBench SuperUser responsibility). This page allows you to configure the interaction center specific parameters for the selected campaign.

Use the steps below to configure campaigns for interaction center execution.

Prerequisite

To configure campaigns for interaction center execution, your user account must be assigned the Oracle Advanced Outbound Telephony Administrator responsibility. The campaign must have already been created in Oracle Marketing. For more information on creating campaigns, refer to *Oracle Marketing Concepts and Procedures*.

Login

HTML Login URL

Responsibility

Oracle Advanced Outbound Telephony Administrator

Steps

1. Click the Campaigns tab (if not already displayed).

   The Campaigns page appears, displaying a summary view table of All Campaigns (default view). The Campaigns page is the default page for the Oracle Advanced Outbound Telephony HTML Administration console. This page contains 2 seeded view settings:

   - My Campaigns - only displays campaigns created by your user account.

   - All Campaigns - allows you to view campaigns created by any user account.

     The "All Campaigns" view is the default view for this page, however, you can select the "My Campaigns"view from the list in the Select Search field, or create your own custom view. To create a custom search view, refer to the Creating , page 6-4Custom Searches topic.

2. From the Name column, click the hyperlinked name of the campaign you want to configure.

   The Interaction Center Campaign Details page appears.

3. Select the **CTI Disabled** box if you want to disable CTI for the selected campaign.

   > **Note:** The campaign cannot be set to CTI Disabled unless all of the campaign activities for the selected campaign are set to manual dialing mode.

4. Click **Update**.

   You receive a confirmation message that your campaign details have been successfully updated.

Related Topics:

Configuring Campaign Activity Details:

The Campaigns page displays a list of campaigns that have been targeted for execution the interaction center. Each of these campaigns contain one or more campaign activities. These campaign activities are specified within Oracle Marketing (by a user with the

Oracle Marketing Campaign WorkBench SuperUser responsibility). This page allows you to configure the interaction center specific parameters for the selected campaign activity.

Use the steps below to configure campaign activity details.

Prerequisite

To configure campaign activities for interaction center execution, your user account must be assigned the Oracle Advanced Outbound Telephony Administrator responsibility. The campaign and campaign activity must have already been created in Oracle Marketing. For more information on creating campaigns and campaign activities, refer to *Oracle Marketing Concepts and Procedures*.

Login

HTML Login URL

Responsibility

Oracle Advanced Outbound Telephony Administrator

Steps

1. Click the Campaigns tab (if not already displayed).

   The Campaigns page appears, displaying a summary view table of all active campaigns. The Campaigns page is the default page for the Oracle Advanced Outbound Telephony HTML Administration console. This page contains 2 seeded view settings:

   • My Campaigns - only displays campaigns created by your user account.

   • All Campaigns - allows you to view campaigns created by any user account.

     The "All Campaigns" view is the default view for this page, however, you can select the "My Campaigns"view from the list in the Select Search field, or create your own custom view. To create a custom search view, refer to the Creating , page 6-4Custom Searches topic.

2. From the Select Search list, select the search view you want.

3. From the Name column of the summary view table, click the name of the campaign activity you want to configure for interaction center execution.

   The campaign activity names are displayed directly under the campaign name for the campaign to which they are associated. The campaign activity name is indented from the campaign name.

The Interaction Center Campaign Activity Details page appears.

4. From the Recycling Algorithm list, select the recycling algorithm you want the campaign activity to use.

5. Optionally, from the Record Filter list, select the record filter rule you want the campaign activity to use.

6. Optionally, from the Release strategy list, select the type of release strategy you want to use with the campaign activity.

   The two options are:

   - **Distribution** - which pulls a specified ratio of records from each campaign activity at the same priority level over time.

   - **Quota** - which releases a specified number of records. Quota will reset after a specified amount of time has passed.

     > **Note:** If you selected **Quota**, in the Quota field you must type the number of records to be released, then in the Quote Reset fields select the hour and minute reset period for the campaign activity. These fields specify the hours and minutes before the quota value is reset to zero (0).

7. Optionally, check the Inherit Parameters from Campaign box.

   If this box is checked, then the rest of the parameters on this page are inherited from the campaign to which the campaign activity is associated, you can click **Update** and you are done configuring the campaign activity parameters. Otherwise, continue on to the next step.

   Refer to the Configuring Inherited Campaign Activity Parameters, page 6-13 topic for steps to configure the inherited campaign activity parameters.

8. Optionally, from the list in the Calendar field, select the user defined calendar you want to associate with the campaign activity.

9. From the Dialing Method list, select the method of dialing you want to use with the campaign activity.

   If you select Timed Preview dialing, you must type a number in the Preview Time field. This is the amount of time Oracle Advanced Outbound Telephony will wait before automatically dialing the record.

10. Optionally, from the Validation Rule list, select the validation rule you want to use for the campaign activity.

11. From the lists in the Reset Time fields, select the time of day reset period for the validation reports.

   This is the time (hour and minute) at which the validation reports on the Performance tab will reset.

12. Click **Update**.

   You return to the Interaction Center Campaign Activity Details page and you receive a confirmation note stating that the configuration was successful.

Related Topics:

- Viewing and Sorting Items, page 6-2

- Creating Custom Views, page 6-4

- Filtering Campaign and Campaign Activity Search Results, page 6-7

- Configuring Campaigns for Interaction Center Execution, page 6-9

- Configuring Inherited Campaign Activity Parameters, page 6-13

- Setting Release Strategy Parameters, page 6-16

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- Generating a Validation Report, page 6-20

- Searching for a Target Group Entry, page 6-22

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- Creating Campaign Activity Subsets, page 6-29

- Using the Subset Load Priority Feature, page 6-39

- Using the Subset Shadow Feature, page 6-41

Configuring Inherited Campaign Activity Parameters:

The situation may arise where you have multiple campaign activities for a campaign. You may want all of those campaign activities to share the same parameters. Instead of configuring the same parameters over and over again for each campaign activity, Oracle Advanced Outbound Telephony allows you to configure campaign activity parameters in one location. Any campaign activity can then inherit these parameters, and changes made to these inherited parameters will affect ALL campaign activities in which the option to utilize inherited parameters has been selected.

Follow the steps below to configure the inherited campaign activity parameters.

Prerequisite

To configure inherited campaign activity parameters, your user account must be assigned the Oracle Advanced Outbound Telephony Administrator responsibility. The campaign must have already been created in Oracle Marketing. For more information on creating campaigns and campaign activities, refer to *Oracle Marketing Concepts and Procedures*.

Login

HTML Login URL

Responsibility

Oracle Advanced Outbound Telephony Administrator

Steps

1. Click the Campaigns tab (if not already displayed).

   The Campaigns page appears, displaying a summary view table of all active campaigns. The Campaigns page is the default page for the Oracle Advanced Outbound Telephony HTML Administration console. This page contains 2 seeded view settings:

   • My Campaigns - only displays campaigns created by your user account.

   • All Campaigns - allows you to view campaigns created by any user account.

     The "All Campaigns" view is the default view for this page, however, you can select the "My Campaigns"view from the list in the Select Search field, or create your own custom view. To create a custom search view, refer to the Creating , page 6-4Custom Searches topic.

2. From the Select Search list, select the search view you want.

3. From the Name column of the summary view table, click a campaign name hyperlink.

   The Interaction Center Campaign Details page appears.

4. From the side panel, click the **Campaign Activities** hyperlink.

   The Interaction Center Campaign Activities page appears.

5. From the side panel, click the **Inherited Campaign Activity Parameters** hyperlink.

The Interaction Center Inherited Campaign Activity Parameters page appears.

6. Optionally, from the list in the Calendar field, select the user defined calendar you want to associate with the campaign activity.

7. From the Dialing Method list, select the method of dialing you want to use with the campaign activity.

   For more information on dialing methods, refer to the Dialing Methods, page 2-17 topic.

   If you select Timed Preview dialing, you must type a number in the Preview Time field. This is the amount of time Oracle Advanced Outbound Telephony will wait before automatically dialing the record.

8. Optionally, from the Validation Rule list, select the validation rule you want to use for the campaign activity.

9. From the lists in the Reset Time fields, select the time of day reset period for the validation reports.

   This is the time (hour and minute) at which the validation reports on the Performance tab will reset.

   > **Important:** If you selected Manual, Preview, Progressive, or Timed Preview dialing method, you can click **Update** and you are done configuring the inherited campaign activity parameters.

10. Click **Update**.

    The Interaction Center Inherited Campaign Activity Parameters refreshes to display a confirmation message stating that the campaign activity has been successfully updated.

Related Topics:

- Viewing and Sorting Items, page 6-2

- Creating Custom Views, page 6-4

- Filtering Campaign and Campaign Activity Search Results, page 6-7

- Configuring Campaigns for Interaction Center Execution, page 6-9

- Configuring Campaign Activity Details, page 6-10

- Setting Release Strategy Parameters, page 6-16

- Validating Campaign Activities, page 6-18

- Generating a Validation Report, page 6-20

- Searching for a Target Group Entry, page 6-22

- Viewing Validation History, page 6-27

- Creating Campaign Activity Subsets, page 6-29

- Using the Subset Load Priority Feature, page 6-39

- Using the Subset Shadow Feature, page 6-41

Setting Release Strategy Parameters:

When using the distribution release strategy, Oracle Advanced Outbound Telephony pulls an indicated ratio of records from each campaign activity at the same priority level over time. Since the distribution strategy utilizes priority level and an indicated ratio number, you must set these in the Oracle Advanced Outbound Telephony HTML Administration console.

Use the steps below to set release strategy parameters.

Prerequisite

To set release strategy parameters, your user account must be assigned the Oracle Advanced Outbound Telephony Administrator responsibility. The campaign and campaign activity must have already been created in Oracle Marketing (for more information on creating campaigns and campaign activities, refer to *Oracle Marketing Concepts and Procedures*). The campaign activity must have at least one target group associated with it.

Login

HTML Login URL

Responsibility

Oracle Advanced Outbound Telephony Administrator

Steps

1. Click the Campaigns tab (if not already displayed).

   The Campaigns page appears, displaying a summary view table of all active campaigns. The Campaigns page is the default page for the Oracle Advanced

- My Campaigns - only displays campaigns created by your user account.

- All Campaigns - allows you to view campaigns created by any user account.

  The "All Campaigns" view is the default view for this page, however, you can select the "My Campaigns"view from the list in the Select Search field, or create your own custom view. To create a custom search view, refer to the Creating , page 6-4Custom Searches topic.

2. Optionally, from the Select Search list, select the search view you want.

3. From the Name column of the summary view table, click the name of the campaign you want to configure for interaction center execution.

   The Interaction Center Campaign Details page appears.

4. From the side panel, click the **Campaign Activities** hyperlink.

   The Interaction Center Campaign Activities page appears, displaying a summary view table of all the campaign activities associated with the selected campaign.

5. From the list in the Distribution Priority column, select the priority level you want the campaign activity to use.

   Priorities determine the relative priority of a campaign activity in comparison to other campaign activities. Campaign activities with a priority of Highest will be exhausted before Oracle Advanced Outbound Telephony moves on to campaign activities with a priority of High.

6. In the Distribution Weight field, type the number of records you want released from the campaign activity.

7. Click **Submit**.

   You return to the Interaction Center Campaign Activities page and you receive a confirmation message that the campaign activityhas been successfully updated.

Related Topics:

- Viewing and Sorting Items, page 6-2

- Creating Custom Views, page 6-4

- Filtering Campaign and Campaign Activity Search Results, page 6-7

- Configuring Campaigns for Interaction Center Execution, page 6-9

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- Using the Subset Shadow Feature, page 6-41

Validating Campaign Activities:

Use the steps below to validate a campaign activity in Oracle Advanced Outbound Telephony.

Prerequisite

To validate a campaign activity, you must be assigned the Oracle Advanced Outbound Telephony Administrator responsibility. A campaign and campaign activity must have been imported into Oracle Advanced Outbound Telephony from Oracle Marketing. The status of the target group associated with the campaign activity must be set to "locked" via Oracle Marketing.

Login

HTML Login URL

Responsibility

Oracle Advanced Outbound Telephony Administrator

Steps

1. Click the Campaigns tab (if not already displayed).

   The Campaigns page appears, displaying a summary view table of all active campaigns. The Campaigns page is the default page for the Oracle Advanced Outbound Telephony HTML Administration console. This page contains 2 seeded view settings:

- My Campaigns - only displays campaigns created by your user account.

- All Campaigns - allows you to view campaigns created by any user account.

  The "All Campaigns" view is the default view for this page, however, you can select the "My Campaigns"view from the list in the Select Search field, or create your own custom view. To create a custom search view, refer to the Creating , page 6-4Custom Searches topic.

2. From the Select Search list, select the search view you want.

3. From the Name column of the summary view table on the Campaigns page, click the name of the campaign containing the campaign activity you want to validate.

   The Interaction Center Campaign Details page appears.

4. From the side panel, click **Campaign Activities**.

   The Interaction Center Campaign Activities page appears, displaying a summary view table of all existing campaign activities associated to the selected campaign.

5. In the Action column for the campaign activity you want to validate, select one of the following:

   - **Validate Now** - runs validation on the campaign activity immediately

   - **Schedule Validation** - allows you to set a date and time at which validation will be run on the campaign activity

6. If you select **Validate Now**:

   1. Click **Submit**.

      The Interaction Center Campaign Activities page refreshes to display a confirmation message stating that the campaign activity has been updated successfully.

7. If you select **Schedule Validation**:

   The Campaign Activity Validation page appears.

   1. Select the Validate at a future time option.

   2. In the Date field, use the calendar tool to select a date at which validation will run.

   3. In the adjacent lists, select a time (hour and minute) at which validation will run one the selected date.

   4. Click **Schedule Validation**.

The Campaign Activity Validation page refreshes to display a confirmation message stating that validation has successfully been scheduled.

5. Click **Done**.

Related Topics:

Generating a Validation Report:

Use the steps below to generate a validation report in Oracle Advanced Outbound Telephony.

Prerequisite

To generate a validation report, you must be assigned the Oracle Advanced Outbound Telephony Administrator responsibility. A campaign and campaign activity must have been imported into Oracle Advanced Outbound Telephony from Oracle Marketing.

Login

HTML Login URL

Responsibility

Oracle Advanced Outbound Telephony Administrator

Steps

1. Click the Campaigns tab (if not already displayed).

   The Campaigns page appears, displaying a summary view table of all active campaigns. The Campaigns page is the default page for the Oracle Advanced Outbound Telephony HTML Administration console. This page contains 2 seeded view settings:

   • My Campaigns - only displays campaigns created by your user account.

   • All Campaigns - allows you to view campaigns created by any user account.

     The "All Campaigns" view is the default view for this page, however, you can select the "My Campaigns"view from the list in the Select Search field, or create your own custom view. To create a custom search view, refer to the Creating , page 6-4Custom Searches topic.

2. From the Select Search list, select the search view you want.

3. From the Name column of the summary view table on the Campaigns page, click the name of the campaign that contains the campaign activity for which you want to generate a validation report.

   The Interaction Center Campaign Details page appears.

4. From the side panel, click **Campaign Activities**.

   The Interaction Center Campaign Activities page appears, displaying a summary view table of all existing campaign activities associated to the selected campaign.

5. From the Validation Report column, click the **View Report** hyperlink for the campaign activity for which you want to generate a report.

   The Validation Report page appears, displaying the report results for the selected campaign activity.

Related Topics:

• Viewing and Sorting Items, page 6-2

- Creating Custom Views, page 6-4

- Filtering Campaign and Campaign Activity Search Results, page 6-7

- Configuring Campaigns for Interaction Center Execution, page 6-9

- Configuring Campaign Activity Details, page 6-10

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- Using the Subset Load Priority Feature, page 6-39

- Using the Subset Shadow Feature, page 6-41

Searching for a Target Group Entry:

You can use the Oracle Advanced Outbound Telephony HTML Administration console to search for a particular target group entry.

Use the steps below to search for a target group entry.

Prerequisite

To search for target group entries, you must be assigned the Oracle Advanced Outbound Telephony Administrator responsibility. A campaign and campaign activity must have been imported into Oracle Advanced Outbound Telephony from Oracle Marketing. Validation must already have been run at least once on the campaign activity/target group.

Login

HTML Login URL

Responsibility

Oracle Advanced Outbound Telephony Administrator

Steps

1. Click the Campaigns tab (if not already displayed).

    The Campaigns page appears, displaying a summary view table of all active campaigns. The Campaigns page is the default page for the Oracle Advanced Outbound Telephony HTML Administration console. This page contains 2 seeded view settings:

    *   My Campaigns - only displays campaigns created by your user account.

    *   All Campaigns - allows you to view campaigns created by any user account.

        The "All Campaigns" view is the default view for this page, however, you can select the "My Campaigns"view from the list in the Select Search field, or create your own custom view. To create a custom search view, refer to the Creating , page 6-4Custom Searches topic.

2. From the Select Search list, select the search view you want.

3. From the Name column of the summary view table on the Campaigns page, click the name of the campaign that contains the campaign activity with the target group entry for which you want to search.

    The Interaction Center Campaign Details page appears.

4. From the side panel, click **Campaign Activities**.

    The Interaction Center Campaign Activities page appears, displaying a summary view table of all existing campaign activities associated to the selected campaign.

5. From the Validation Report column, click the **View Report** hyperlink for the campaign activity for which you want to generate a report.

    The Validation Report page appears, displaying the report results for the selected campaign activity.

6. From the side panel, click **Target Group Entries**.

    The Target Group Entries page appears, displaying all the entries in the target group associated to the selected campaign activity. Two lists and a field also appear above the summary view table of target group entries, you enter your search criteria in these fields.

7. From the list in the first field, select the criteria by which you want to search the target group entries.

8. From the list in the second field, select the type of operator you want to use in your search.

9. In the third field, type the search value you want to use.

> **Note:** If you are unsure of the exact criteria you want to search for, you can use the "LIKE" operator, type the first character or two of your search criteria, and use a wildcard (%).

10. Click **Search**.

The summary view table on the Target Group Entries page refreshes to display the results of your search.

Related Topics:

- Viewing and Sorting Items, page 6-2

- Creating Custom Views, page 6-4

- Filtering Campaign and Campaign Activity Search Results, page 6-7

- Configuring Campaigns for Interaction Center Execution, page 6-9

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- Using the Subset Load Priority Feature, page 6-39

- Using the Subset Shadow Feature, page 6-41

Modifying a Target Group Entry:

You can use the Oracle Advanced Outbound Telephony HTML Administration console to modify the country code, area code, phone number, and time zone of any target group entries that fail validation. You can also update the TCA schema with these changes to the target group entries.

Use the steps below to modify target group entries.

Prerequisite

To modify a target group entry, you must be assigned the Oracle Advanced Outbound Telephony Administrator responsibility. A campaign and campaign activity must have been imported into Oracle Advanced Outbound Telephony from Oracle Marketing. Validation must already have been run at least once on the campaign activity/target group and at least one target group entry must have failed validation.

Login

HTML Login URL

Responsibility

Oracle Advanced Outbound Telephony Administrator

Steps

1. Click the Campaigns tab (if not already displayed).

    The Campaigns page appears, displaying a summary view table of all active campaigns. The Campaigns page is the default page for the Oracle Advanced Outbound Telephony HTML Administration console. This page contains 2 seeded view settings:

    •   My Campaigns - only displays campaigns created by your user account.

    •   All Campaigns - allows you to view campaigns created by any user account.

        The "All Campaigns" view is the default view for this page, however, you can select the "My Campaigns"view from the list in the Select Search field, or create your own custom view. To create a custom search view, refer to the Creating , page 6-4Custom Searches topic.

2. From the Select Search list, select the search view you want.

3. From the Name column of the summary view table on the Campaigns page, click the name of the campaign that contains the campaign activity with the target group entry you want to modify.

    The Interaction Center Campaign Details page appears.

4. From the side panel, click **Campaign Activities**.

    The Interaction Center Campaign Activities page appears, displaying a summary view table of all existing campaign activities associated to the selected campaign.

5. From the Validation Report column, click the **View Report** hyperlink for the appropriate campaign activity.

   The Validation Report page appears, displaying the report results for the selected campaign activity.

6. From the side panel, click **Target Group Entries**.

   The Target Group Entries page appears, displaying all the entries in the target group associated to the selected campaign activity. Two lists and a field also appear above the summary view table of target group entries, you enter your search criteria in these fields.

   You can use the **First**, **Previous**, **Next**, or **Last** hyperlinks to navigate to the target group entry you want to modify, or you can use the search feature to narrow down the number of entries. Refer to the Searching for a Target Group , page 6-22Entry topic for steps on using the search feature.

7. In the Details column for the appropriate target group entry, click the **Details** hyperlink.

   The Target Group Entry Details page appears.

8. In the provided fields, you can modify the following information for the target group entry:

   • Phone Country Code

   • Phone Area Code

   • Phone Number

   • Time Zone

9. Select the Update TCA option to record your target group entry changes to TCA.

10. Click **Update**.

    The Target Group Entry Details page refreshes to display a confirmation message stating that your changes have been saved.

Related Topics:

   • Viewing and Sorting Items, page 6-2

   • Creating Custom Views, page 6-4

   • Filtering Campaign and Campaign Activity Search Results, page 6-7

- Configuring Campaigns for Interaction Center Execution, page 6-9

- Configuring Campaign Activity Details, page 6-10

- Configuring Inherited Campaign Activity Parameters, page 6-13

- Setting Release Strategy Parameters, page 6-16

- Validating Campaign Activitiees, page 6-18

- Generating a Validation Report, page 6-20

- Searching for a Target Group Entry, page 6-22

- Viewing Validation History, page 6-27

- Creating Campaign Activity Subsets, page 6-29

- Using the Subset Load Priority Feature, page 6-39

- Using the Subset Shadow Feature, page 6-41

Viewing Validation History:

You can use the Oracle Advanced Outbound Telephony HTML Administration console to view the validation history of a specified target group.

Use the steps below to view the validation history of a target group.

Prerequisite

To view validation history, you must be assigned the Oracle Advanced Outbound Telephony Administrator responsibility. A campaign and campaign activity must have been imported into Oracle Advanced Outbound Telephony from Oracle Marketing. Validation must already have been run at least once on the campaign activity/target group.

Login

HTML Login URL

Responsibility

Oracle Advanced Outbound Telephony Administrator

Steps

1. Click the Campaigns tab (if not already displayed).

   The Campaigns page appears, displaying a summary view table of all active campaigns. The Campaigns page is the default page for the Oracle Advanced Outbound Telephony HTML Administration console. This page contains 2 seeded view settings:

   - My Campaigns - only displays campaigns created by your user account.

   - All Campaigns - allows you to view campaigns created by any user account.

     The "All Campaigns" view is the default view for this page, however, you can select the "My Campaigns"view from the list in the Select Search field, or create your own custom view. To create a custom search view, refer to the Creating , page 6-4Custom Searches topic.

2. From the Select Search list, select the search view you want.

3. From the Name column of the summary view table on the Campaigns page, click the name of the campaign that contains the campaign activity for which you want to view the validation history.

   The Interaction Center Campaign Details page appears.

4. From the side panel, click **Campaign Activities**.

   The Interaction Center Campaign Activities page appears, displaying a summary view table of all existing campaign activities associated to the selected campaign.

5. From the Validation Report column, click the **View Report** hyperlink for the appropriate campaign activity.

   The Validation Report page appears, displaying the report results for the selected campaign activity.

6. From the side panel, click **Validation History**.

   The Validation History page appears, displaying a summary view table of all validation runs for the selected campaign activity.

Related Topics:

- Viewing and Sorting Items, page 6-2

- Creating Custom Views, page 6-4

- Filtering Campaign and Campaign Activity Search Results, page 6-7

- Configuring Campaigns for Interaction Center Execution, page 6-9

- Configuring Campaign Activity Details, page 6-10

- Configuring Inherited Campaign Activity Parameters, page 6-13

- Setting Release Strategy Parameters, page 6-16

- Validating Campaign Activitiees, page 6-18

- Generating a Validation Report, page 6-20

- Searching for a Target Group Entry, page 6-22

- Creating Campaign Activity Subsets, page 6-29

- Using the Subset Load Priority Feature, page 6-39

- Using the Subset Shadow Feature, page 6-41

Creating Campaign Activity Subsets:

Use the steps below to create target group subsets in Oracle Advanced Outbound Telephony.

Prerequisite

To create campaign activity subsets, your user account must be assigned the Oracle Advanced Outbound Telephony Administrator responsibility. A campaign and campaign activity must have been imported into Oracle Advanced Outbound Telephony from Oracle Marketing.

Login

HTML Login URL

Responsibility

Oracle Advanced Outbound Telephony Administrator

Steps

1. Click the Campaigns tab (if not already displayed).

   The Campaigns page appears, displaying a summary view table of all active campaigns. The Campaigns page is the default page for the Oracle Advanced Outbound Telephony HTML Administration console. This page contains 2 seeded

view settings:

- My Campaigns - only displays campaigns created by your user account.

- All Campaigns - allows you to view campaigns created by any user account.

  The "All Campaigns" view is the default view for this page, however, you can select the "My Campaigns"view from the list in the Select Search field, or create your own custom view. To create a custom search view, refer to the Creating , page 6-4Custom Searches topic.

2. From the Select Search list, select the search view you want.

3. From the Name column of the summary view table on the Campaigns page, click the name of the campaign under which the campaign activity for which you want to create subsets resides.

   The Interaction Center Campaign Details page appears.

4. From the side panel, click **Campaign Activities**.

   The Interaction Center Campaign Activities page appears, displaying a summary view table of all existing campaign activities associated to the selected campaign.

5. From the Activity Name column of the summary view table, click the name of the campaign activity for which you want to create subsets.

   The Interaction Center Campaign Activity Details page appears.

6. From the side panel, click **Campaign Activity Subsets**.

   The Interaction Center Campaign Activity Subsets page appears, displaying a summary view table of all existing subsets for the selected campaign activity.

7. Click **Create Subset**.

   The Create Subset page appears.

8. In the Subset Name field, type a name for the new subset.

   > **Note:** Subset names have a 64 character limit and only the following characters are supported:
   >
   > - A-Z
   >
   > - 0-9
   >
   > - underscore, space, and hyphen

9. Optionally, from the Priority list, select the priority you want to assign the subset.

Note: Priorities determine the relative order of a subset in comparison to other subsets. It is similar to campaign activity priority however applied at a subset level.

Note: Subset priority provides the ability to define the order in which the outbound campaign manager will check to determine if records are available for the release. Campaign activity priority order will be examined first, then within the selected campaign activity, the subset priority will be examined to determine the subset from which a record is to be selected.

Note: Highest through Medium level priorities are preemptive; all campaign activity subsets with priorities in this range will be exhausted in priority sequence before the next priority level is used. Low and Lowest priorities are used in round-robin fashion; each of these campaign activity subsets will release its quantum of records, then the next campaign activity subset in the same priority level will be used.

10. Optionally, from the Release Strategy list, select a release strategy to use with the subset.

    Note: Subset release strategy is similar to campaign activity release strategy however applied at a subset level. The release strategy influences the number of records to be released from a subset.

    Note: The distribution release strategy pulls a specified ratio of records from each campaign activity of the same priority level over time.

    Note: The quota release strategy stops releasing records from a campaign activity or subset when a pre-defined limit has been reached. This strategy disburses records from a campaign activity or subset based on the quota that is assigned to the campaign activity or subset.

11. In the Quantum field, type the number of records you want to set as your limit.

    The quantum number is the number of records from each subset that are released before moving on to the next subset in the campaign activity.

12. If you selected a **Quota** release strategy, you must:

    1. In the Quota field, type the number of records to be released

    2. In the Quota Reset Hour and Minute fields, select the hour and minute reset period for the campaign activity. These fields specify the hours and minutes before the quota value is reset to zero (0).

13. Click **Next**.

    The Create Campaign Activity Subset Selection Criteria page appears, displaying a summary view table for selection criteria conditions.

14. In the Field column, type the name of the field you want to use as the condition for the selection criteria.

    > **Note:** If you are not sure of the field name, you can click the search icon (flashlight). Doing so will open the Select a Field page, in which you can search for and select a field name.

15. From the list in the Operator column, select the operator you want to use for your subset condition.

16. In the Field Value column, type the value you want to use for your subset condition.

17. To test how many records this condition will pull from the campaign activity, click **Test**.

18. Click **Create Subset**.

    > **Note:** If you want to add multiple conditions to the condition statement, repeat steps 14-18 in the next set of fields below the ones for your current condition, but remember to select how you want the conditions joined from the list in the Join Condition field before clicking **Create Subset**.

    The Interaction Center Campaign Activity Subsets page appears, displaying the new subset in the summary view table.

19. To activate/deactivate the subset:

    1. In the Activate/Deactivate column, click **Activate** or **Deactivate** (depending on the current status of the subset).

    2. Click **Update**.

Related Topics:

Modifying Campaign Activity Subsets:

Use the steps below to modify campaign activity subsets in Oracle Advanced Outbound Telephony.

Prerequisite

To modify campaign activity subsets, your user account must be assigned the Oracle Advanced Outbound Telephony Administrator responsibility. A campaign and campaign activity must have been imported into Oracle Advanced Outbound Telephony from Oracle Marketing and you must have already created at least one campaign activity subset.

Login

HTML Login URL

Responsibility

Oracle Advanced Outbound Telephony Administrator

Steps

1. Click the Campaigns tab (if not already displayed).

   The Campaigns page appears, displaying a summary view table of all active campaigns. The Campaigns page is the default page for the Oracle Advanced Outbound Telephony HTML Administration console. This page contains 2 seeded view settings:

   - My Campaigns - only displays campaigns created by your user account.

   - All Campaigns - allows you to view campaigns created by any user account.

     The "All Campaigns" view is the default view for this page, however, you can select the "My Campaigns"view from the list in the Select Search field, or create your own custom view. To create a custom search view, refer to the Creating , page 6-4Custom Searches topic.

2. From the Select Search list, select the search view you want.

3. From the Name column of the summary view table on the Campaigns page, click the name of the campaign under which the campaign activity for which you want to modify subsets resides.

   The Interaction Center Campaign Details page appears.

4. From the side panel, click **Campaign Activities**.

   The Interaction Center Campaign Activities page appears, displaying a summary view table of all existing campaign activities associated to the selected campaign.

5. From the Activity Name column of the summary view table, click the name of the campaign activity for which you want to create subsets.

   The Interaction Center Campaign Activity Details page appears.

6. From the side panel, click **Campaign Activity Subsets**.

   The Interaction Center Campaign Activity Subsets page appears, displaying a summary view table of all existing subsets for the selected campaign activity.

7. From the Subset Name column of the summary view table, click the name of the subset you want to modify.

   The Campaign Activity Subset Details page appears.

8. Edit the fields as needed.

   1. To modify the subset priority: from the list in the Priority field, select a new subset priority. Click **Update** if you are finished modifying the subset.

      > **Note:** Priorities determine the relative priority of a subset in comparison to other subsets. It is similar to campaign activity priority however applied at a subset level.
      >
      > Subset priority provides the ability to define the order in which the outbound campaign manager will check to determine if records are available for the release. Campaign activity priority order will be examined first, then within the selected campaign activity, the subset priority will be examined to determine the subset from which a record is to be selected.
      >
      > Highest through Medium level priorities are preemptive; all campaign activity subsets with priorities in this range will be exhausted in priority sequence before the next priority level is used. Low and Lowest priorities are used in round-robin fashion; each of these campaign activity subsets will release its quantum of records, then the next campaign activity subset in the same priority level will be used.

   2. To modify the subset release priority: from the list in the Release Strategy field, select a new release strategy for the subset. Click **Update** if you are finished modifying the subset.

      > **Note:** Subset release strategy is similar to campaign activity release strategy however applied at a subset level. The release strategy influences the number of records to be released from a subset.
      >
      > The distribution release strategy pulls a specified ratio of records from each campaign activity of the same priority level over time.
      >
      > The quota release strategy stops releasing records from a campaign activity or subset when a pre-defined limit has been reached. This strategy disburses records from a campaign activity or subset based on the quota that is assigned to the campaign activity or subset.

3. To modify the quantum number, in the Quantum field, type a new number.

> **Note:** The quantum number is the number of records from each subset that are released before moving on to the next subset in the campaign activity.

> **Note:** If you selected a **Quota** release strategy:

> - In the Quota field, type the number of records to be released.

> - In the Quota Reset Hour and Minute fields, select the hour and minute reset period for the campaign activity. These fields specify the hours and minutes before the quota value is reset to zero (0).

4. To modify the selection criteria: click **Edit** (located below the Selection Criteria Shadow field). When the Edit Campaign Activity Subset Selection Criteria page appears, modify the field, operator, or field values as needed. If you are finished modifying the subset, click **Update**, then click **Done**.

> **Note:** For more detailed steps on adding field, operator, and field values, see steps 14-18 in the Creating Campaign Activity Subsets, page 6-29 topic.

> The Subset Details page refreshes to display the updated selection criteria in the Selection Criteria Shadow field.

5. Select the Replace Selection Criteria option.

6. Click **Update**.

9. From the side panel, click **Campaign Activity Parameters**.

10. Click **Update**.

Related Topics:

- Viewing and Sorting Items, page 6-2

- Creating Custom Views, page 6-4

- Filtering Campaign and Campaign Activity Search Results, page 6-7

Removing Campaign Activity Subsets:

Use the steps below to remove target group subsets in Oracle Advanced Outbound Telephony.

Prerequisite

To remove campaign activity subsets, your user account must be assigned the Oracle Advanced Outbound Telephony Administrator responsibility. A campaign and campaign activity must have been imported into Oracle Advanced Outbound Telephony from Oracle Marketing and you must have already created at least one campaign activity subset.

Login

HTML Login URL

Responsibility

Oracle Advanced Outbound Telephony Administrator

Steps

1. Click the Campaigns tab (if not already displayed).

    The Campaigns page appears, displaying a summary view table of all active campaigns. The Campaigns page is the default page for the Oracle Advanced Outbound Telephony HTML Administration console. This page contains 2 seeded view settings:

    - My Campaigns - only displays campaigns created by your user account.

    - All Campaigns - allows you to view campaigns created by any user account.

        The "All Campaigns" view is the default view for this page, however, you can select the "My Campaigns"view from the list in the Select Search field, or create your own custom view. To create a custom search view, refer to the Creating , page 6-4Custom Searches topic.

2. From the Select Search list, select the search view you want.

3. From the Name column of the summary view table on the Campaigns page, click the name of the campaign to which the campaign activity from which you want to remove subsets is associated.

    The Interaction Center Campaign Details page appears.

4. From the side panel, click **Campaign Activities**.

    The Interaction Center Campaign Activities page appears, displaying a summary view table of any existing campaign activities associated to the selected campaign.

5. From the Activity Name column of the summary view table, click the name of the campaign activity from which you want to remove subsets.

    The Interaction Center Campaign Activity Details page appears and the side panel expands to include a Campaign Activity Subsets link.

6. From the side panel, click **Campaign Activity Subsets**.

    The Interaction Center Campaign Activity Subsets page appears, displaying a summary view table of any existing subsets for the selected campaign activity.

7. From the Remove column of the summary view table, click the box for the subset you want to remove.

8. Click **Update**.

    The selected target group subset is removed and the Interaction Center Campaign Activity Subsets page displays a confirmation note stating that the update was successful.

Related Topics:

Using the Subset Load Priority Feature:

When you have multiple subsets, you run the risk of a single record appearing in more than one subset. For example, if your first subset is for people over the age of fifty and your second subset is for those whose annual income is greater than $50,000.00, there is a good possibility that some records will appear in both subsets.

The subset load priority allows you to indicate to which subset the record belongs.

Use the steps below to set the desired subset load priority.

Prerequisite

To set subset load priority, your user account must be assigned the Oracle Advanced Outbound Telephony Administrator responsibility. A campaign and campaign activity must have been imported into Oracle Advanced Outbound Telephony from Oracle

Marketing and two or more subsets must already exist for the campaign activity.

Login

HTML Login URL

Responsibility

Oracle Advanced Outbound Telephony Administrator

Steps

1. Click the Campaigns tab (if not already displayed).

   The Campaigns page appears, displaying a summary view table of all active campaigns. The Campaigns page is the default page for the Oracle Advanced Outbound Telephony HTML Administration console. This page contains 2 seeded view settings:

   - My Campaigns - only displays campaigns created by your user account.

   - All Campaigns - allows you to view campaigns created by any user account.

     The "All Campaigns" view is the default view for this page, however, you can select the "My Campaigns"view from the list in the Select Search field, or create your own custom view. To create a custom search view, refer to the Creating , page 6-4Custom Searches topic.

2. From the Select Search list, select the search view you want.

3. From the Name column of the summary view table on the Campaigns page, click the name of the appropriate campaign.

   The Interaction Center Campaign Details page appears.

4. From the side panel, click **Campaign Activities**.

   The Interaction Center Campaign Activities page appears, displaying a summary view table of any existing campaign activities associated to the selected campaign.

5. From the Activity Name column of the summary view table, click the name of the appropriate campaign activity.

   The Interaction Center Campaign Activity Details page appears and the side panel expands to include a Campaign Activity Subsets link.

6. From the side panel, click **Campaign Activity Subsets**.

   The Interaction Center Campaign Activity Subsets page appears, displaying a summary view table of any existing subsets for the selected campaign activity.

7. In the Load Priority column of the summary view table, click the Move Up or Move Down arrows as appropriate to establish the desired priority order for your subsets.

8. Click **Update**.

Related Topics:

- Viewing and Sorting Items, page 6-2

- Creating Custom Views, page 6-4

- Filtering Campaign and Campaign Activity Search Results, page 6-7

- Configuring Campaigns for Interaction Center Execution, page 6-9

- Configuring Campaign Activity Details, page 6-10

- Configuring Inherited Campaign Activity Parameters, page 6-13

- Setting Release Strategy Parameters, page 6-16

- Validating Campaign Activities, page 6-18

- Generating a Validation Report, page 6-20

- Searching for a Target Group Entry, page 6-22

- Viewing Validation History, page 6-27

- Creating Campaign Activity Subsets, page 6-29

- Using the Subset Shadow Feature, page 6-41

Using the Subset Shadow Feature:

Oracle Advanced Outbound Telephony allows you to create a duplicate, or shadow, version of the selection criteria for each subset. This shadow version is displayed directly under the active selection criteria area. You can use the shadow version to make changes to the subset selection criteria without affecting the original. Once you are satisfied with your changes, you can apply the changes, thus replacing the original.

Follow the steps below to use the subset shadow feature.

Login

HTML Login URL

Responsibility

Oracle Advanced Outbound Telephony Administrator

Steps

1. Click the Campaigns tab (if not already displayed).

   The Campaigns page appears, displaying a summary view table of all active campaigns. The Campaigns page is the default page for the Oracle Advanced Outbound Telephony HTML Administration console. This page contains 2 seeded view settings:

   • My Campaigns - only displays campaigns created by your user account.

   • All Campaigns - allows you to view campaigns created by any user account.

     The "All Campaigns" view is the default view for this page, however, you can select the "My Campaigns"view from the list in the Select Search field, or create your own custom view. To create a custom search view, refer to the Creating , page 6-4Custom Searches topic.

2. From the Select Search list, select the search view you want.

3. From the Name column of the summary view table on the Campaigns page, click the name of the campaign under which the campaign activity for which you want to modify subsets resides.

   The Interaction Center Campaign Details page appears.

4. From the side panel, click **Campaign Activities**.

   The Interaction Center Campaign Activities page appears, displaying a summary view table of all existing campaign activities associated to the selected campaign.

5. From the Activity Name column of the summary view table, click the name of the campaign activity for which you want to create subsets.

   The Interaction Center Campaign Activity Details page appears.

6. From the side panel, click **Campaign Activity Subsets**.

   The Interaction Center Campaign Activity Subsets page appears, displaying a summary view table of all existing subsets for the selected campaign activity.

7. From the Subset Name column of the summary view table, click the name of the subset containing the selection criteria you want to shadow.

   The Subset Details page appears.

8. Next to the Selection Criteria Shadow area, click **Edit**.

    The Edit Campaign Activity Subset Selection Criteria page appears.

9. In the Field column, type the name of the field you want to use as the condition for the selection criteria.

    > **Note:** If you are not sure of the field name, you can click the search icon (flashlight). Doing so will open the Select a Field dialog box, in which you can search for and select a field name.

10. From the list in the Operator column, select the operator you want to use for your subset condition.

11. In the Field Value column, type the value you want to use for your subset condition.

12. To test how many records this condition will pull from the target group, click **Test**.

13. Click **Update**.

    > **Note:** If you want to add multiple conditions to the condition statement, repeat steps 13-16 in the next set of fields below the ones for your current condition, but remember to select how you want the conditions joined from the list in the Join Condition field before clicking **Create Subset**.

14. Click **Done**.

    You are returned to the Interaction Center Campaign Activity Subsets page.

15. If you want to replace the active selection criteria with your new selection criteria:

    1. From Subset Name column of the summary view table, click the subset for which you used the subset shadow feature.

        The Subset Details page appears.

    2. Select the **Replace Selection Criteria** option.

    3. Click **Update**.

    4. From the side panel, click **Campaign Activity Subsets**.

        Interaction Center Campaign Activity Subsets page appears.

    5. Click **Update**.

The new selection criteria replaces the old selection criteria.

Related Topics:

Campaign Activity Management

Use the Campaign Activity Management page to append target group entries, or schedule them to be appended at a later date.

Tasks:

You can perform the following tasks:

Moving Campaign Activity Entries:

Oracle Advanced Outbound Telephony allows you to copy new records to an existing campaign activity by creating a new campaign activity and appending it to an existing campaign activity. This process allows you to dynamically add new records to a

campaign activity, or, in other words, add records to a campaign activity while records from that campaign activity are being dialed.

Use the Steps below to append campaign activity entries.

Prerequisite

To access the Oracle Advanced Outbound Telephony HTML Administration console, your user account must be assigned the Oracle Advanced Outbound Telephony Administrator responsibility. An existing campaign activity must be present and you must have already created the new campaign activity containing the list information you want to append to the existing campaign activity. The campaign activity must be validated at least once. The status for both the source and the destination campaign activities must be either "Locked" or "Executing", and the campaign activities must be Call Center Ready.

Login

HTML Login URL

Responsibility

Oracle Advanced Outbound Telephony Administrator

Steps

1. Click the Campaigns tab (if not already displayed).

2. Click the **Campaign Activity Management** subtab.

   The Copy Activity Entries page appears.

3. From the View list, select the view you want.

   This page contains 2 seeded view settings:

   • My Activities - only displays campaign activities created by your user account.

   • All Activities - allows you to view campaign activities created by any user account.

4. In the Copy Link column, click the **Copy** hyperlink for the campaign activity from which you want to copy entries.

   The Copy Activity Entries page appears.

5. In the To: list, select the campaign activity to which you want to copy entries.

6. Select either the **Copy Now** option, or the **Copy at a future time** option.

7. If you selected **Copy at a future time**:

    1. Click the calendar icon and select the date on which you want the campaign activity copy to occur.

    2. Select the hour and minute at which you want the copy to occur on the selected day.

8. Click **Copy**.

Recycling Algorithms

Use the Recycling Algorithms page to create, or remove recycling algorithms; add, modify, or remove algorithm conditions, and sub-conditions; add or remove pre and post-processing actions; and set up actions to execute if no sub-conditions are met.

Tasks

You can perform the following tasks:

- Viewing and Sorting Items, page 6-47

- Creating Recycling Algorithms, page 6-48

- Removing Recycling Algorithms, page 6-51

- Changing the Source Type Code for an Algorithm, page 6-52

- Using the Recycling Algorithm Shadow Feature, page 6-53

- Adding Pre or Post-Processing Actions, page 6-53

- Modifying Pre or Post-Processing Actions, page 6-54

- Removing Pre or Post-Processing Actions, page 6-56

- Adding Algorithm Conditions, page 6-57

- Modifying Algorithm Conditions, page 6-59

- Deleting Algorithm Conditions, page 6-60

- Adding Algorithm Sub-Conditions, page 6-61

- Modifying Algorithm Sub-Conditions, page 6-63

- Deleting Algorithm Sub-Conditions, page 6-64

- Adding Actions Performed if no Sub-Conditions are met, page 6-66

- Modifying Actions Performed if no Sub-Conditions are met, page 6-67

- Deleting Actions Performed if no Sub-Conditions are met, page 6-69

Viewing and Sorting Items:

There are six tabs in the Oracle Advanced Outbound Telephony HTML Administration console, including: Campaigns, Algorithms, Calling Calendars, Telephony, Performance, and Administration. Many of these pages contain subtab menus.

Use the steps below to view or sort the contents of a selected page in the Oracle Advanced Outbound Telephony HTML Administration console.

Prerequisite

To access the Oracle Advanced Outbound Telephony HTML Administration console, your user account must be assigned the Oracle Advanced Outbound Telephony Administrator responsibility.

Login

HTML Login URL

Responsibility

Oracle Advanced Outbound Telephony Administrator

Steps

1. From the Oracle Advanced Outbound Telephony HTML Administration console, click the tab you want to view.

   The selected page appears, displaying a summary view table of its contents.

2. Click the subtab menu item you want to view (if other than the default).

   The selected subtab menu item's page appears, displaying a summary view table of its contents.

   > **Note:** The Oracle Advanced Outbound Telephony HTML Administration console always defaults to the first subtab's contents.

3. If there are more items than can fit in the page, click **First**, **Previous**, **Next**, or **Last** to continue viewing the items.

4. Click the column header by which you want to sort the contents of the summary view table.

> **Note:** You can sort the summary view table items in either ascending or descending order by clicking any of the underlined column headers.

A blue sort arrow appears to the right of the column heading. This arrow indicates whether you are sorting in ascending or descending order.

5. Click the arrow to reverse the sort order.

Creating Recycling Algorithms:

There are two ways to create a recycling algorithm:

- by copying an existing recycling algorithm, page 6-48
- by creating a completely new recycling algorithm, page 6-49

Creating Recycling Algorithms by Copying an Existing Algorithm

Use the steps below to create recycling algorithms by copying existing algorithms in Oracle Advanced Outbound Telephony.

Prerequisite

To create recycling algorithms, your user account must be assigned the Oracle Advanced Outbound Telephony Administrator responsibility.

Login

HTML Login URL

Responsibility

Oracle Advanced Outbound Telephony Administrator

Steps

1. Click **Algorithms > Recycling Algorithms**.

The Recycling Algorithms page appears, displaying a list of all existing recycling

algorithms. The Recycling Algorithm page is the default view for the algorithms page.

2. On the Recycling Algorithms page, click **Create Recycling Algorithm**.

   The Create Recycling Algorithm page appears.

3. In the Algorithm Name field, type a name for the new recycling algorithm.

   > **Note:** Algorithm names have a 64 character limit and only the following characters are supported:
   >
   > - A-Z
   >
   > - 0-9
   >
   > - underscore, space, and hyphen

4. Select the **Copy From Existing Algorithms** option.

5. From the lists in the provided fields, select the existing algorithm you want to copy and select the source type you want to use.

   > **Note:** Source types define how fields from the database (typically TCA) map to the columns of a list entry.
   >
   > Oracle Advanced Outbound Telephony recycling algorithms are directly associated to source types because they define which fields are present in a list.
   >
   > Oracle Advanced Outbound Telephony supports two source types:
   >
   > - B to B - Business to Business (ORGANIZATION_CONTACT_LIST)
   >
   > - B to C - Business to Consumer (PERSON_LIST)

6. Click **Create**.

   The new recycling algorithm is created.

   The Recycling Algorithm Detail page appears, displaying a current and shadow view of the algorithm conditions. For information on adding and modifying algorithm conditions, refer to the Adding Algorithm Conditions, page 6-57 and Modifying , page 6-59Algorithm Conditions topics.

Creating Completely new Recycling Algorithms

Use the steps below to create completely new recycling algorithms in Oracle Advanced

Outbound Telephony.

Prerequisite

To create recycling algorithms, your user account must be assigned the Oracle Advanced Outbound Telephony Administrator responsibility.

Login

HTML Login URL

Responsibility

Oracle Advanced Outbound Telephony Administrator

Steps

1. Click **Algorithms > Recycling Algorithms**.

   The Recycling Algorithms page appears, displaying a list of all existing recycling algorithms. The Recycling Algorithm page is the default view for the algorithms page.

2. On the Recycling Algorithms page, click **Create Recycling Algorithm**.

   The Create Recycling Algorithm page appears.

3. On the Create Recycling Algorithm page, type a name for the new recycling algorithm in the Algorithm Name field.

   > **Note:** Algorithm names have a 64 character limit and only the following characters are supported:
   >
   > • A-Z
   >
   > • 0-9
   >
   > • underscore, space, and hyphen

4. Select the **Create New Algorithm** option and from the list in the Select Source Type field, select the source type you want to use.

   > **Note:** Source types define how fields from the database (typically TCA) map to the columns of a list entry.
   >
   > Oracle Advanced Outbound Telephony recycling algorithms are

directly associated to source types because they define which fields are present in a list.

Oracle Advanced Outbound Telephony supports two source types:

- B to B - Business to Business (ORGANIZATION_CONTACT_LIST)

- B to C - Business to Consumer (PERSON_LIST)

5. Click **Create**.

The new recycling algorithm is created.

The Recycling Algorithm Detail page appears, displaying the summary view of the algorithm conditions. Since this is a new algorithm, no existing pre or post-processing actions, or add algorithm conditions should be displayed. For information on adding algorithm conditions, refer to the Adding Algorithm , page 6-57Conditions topic.

Removing Recycling Algorithms:

Use the steps below to remove recycling algorithms in Oracle Advanced Outbound Telephony.

Prerequisite

To remove recycling algorithms, your user account must be assigned the Oracle Advanced Outbound Telephony Administrator responsibility. At least one algorithm must have already been created.

Login

HTML Login URL

Responsibility

Oracle Advanced Outbound Telephony Administrator

Steps

1. Click **Algorithms > Recycling Algorithms**.

The Recycling Algorithms page appears, displaying a list of all existing recycling algorithms. The Recycling Algorithm page is the default view for the algorithms page.

2. In the Remove column, click the box for the recycling algorithm you want to remove.

3. Click **Update**.

    The selected recycling algorithm is removed.

Changing the Source Type Code for an Algorithm:

Oracle Advanced Outbound Telephony allows you to change the source type code for a recycling algorithm.

Source types define how fields from the database (typically TCA) map to the columns of a list entry.

Oracle Advanced Outbound Telephony recycling algorithms are directly associated to source types because they define which fields are present in a list.

Oracle Advanced Outbound Telephony supports two source types:

*   B to B - Business to Business (ORGANIZATION_CONTACT_LIST)

*   B to C - Business to Consumer (PERSON_LIST)

Use the steps below to change the source type code for a recycling algorithm.

Prerequisite

To change the source type code for a recycling algorithm, your user account must be assigned the Oracle Advanced Outbound Telephony Administrator responsibility. At least one algorithm must have already been created.

Login

HTML Login URL

Responsibility

Oracle Advanced Outbound Telephony Administrator

Steps

1. Click **Algorithms > Recycling Algorithms**.

    The Recycling Algorithms page appears, displaying a list of all existing recycling algorithms. The Recycling Algorithm page is the default view for the algorithms page.

2. In the Source Type Code column, select a different source type code from the list.

3. Click **Update**.

The Recycling Algorithms page refreshes to display the new source type code for the recycling algorithm.

Using the Recycling Algorithm Shadow Feature:

Oracle Advanced Outbound Telephony automatically creates a duplicate, or shadow, version of each recycling algorithm. This shadow version is displayed to the right of the original or "live" version on the Recycling Algorithm Detail page. You can use the shadow version to make changes to or manipulate the recycling algorithm without affecting the original. Once you are satisfied with your changes, you can click **Replace** to apply the changes to the original version.

> **Note:** Before you click **Replace**, ensure your modified recycling algorithm is valid and will not generate errors. Once you click **Replace** and overwrite the original recycling algorithm, you cannot retrieve the original algorithm.

Adding Pre or Post-Processing Actions:

Use the steps below to add pre or post-processing actions to existing recycling algorithms in Oracle Advanced Outbound Telephony.

Prerequisite

To add pre or post-processing actions, your user account must be assigned the Oracle Advanced Outbound Telephony Administrator responsibility. You must also have an existing algorithm, to which you can add the pre or post-processing actions.

Login

HTML Login URL

Responsibility

Oracle Advanced Outbound Telephony Administrator

Steps

1. Click **Algorithms > Recycling Algorithms**.

The Recycling Algorithms page appears, displaying a list of all existing recycling algorithms. The Recycling Algorithm page is the default view for the algorithms page.

2. From the list of existing recycling algorithms, click the algorithm name of the algorithm to which you want to add pre or post-processing actions.

   The Recycling Algorithm Detail page appears, displaying a summary view of all the existing pre and post-processing actions and all the existing conditions.

3. From the Recycling Algorithm Details page, click the **Pre-Processing Action(s)** link to add pre-processing actions, or click the **Post-Processing Action(s)** linkto add post-processing actions.

   The Edit Recycling Algorithm Action page appears, displaying a summary view table for pre or post-processing actions (depending on which link you clicked).

4. From the list in the Action column of the summary view table, select the action you want to add and click **Update**.

   > **Note:** Some actions require you to enter further information. The actions that require additional information have "**...**" after their name in the list. If the action you selected requires additional information, when you click **Update**, additional fields will appear, in which you need to enter information. Once you have entered the necessary additional information, click **Update**.

   The selected action is added and the summary view table refreshes to show the new action.

5. On the Edit Recycling Algorithm Action page, click the hyperlinked algorithm name.

   The Recycling Algorithm Detail page appears, displaying your new pre or post-processing action(s) in the shadow area.

6. If you are satisfied with your new pre or post-processing action(s), click **Replace**.

   The Recycling Algorithm Detail page refreshes to display the new pre or post-processing actions.

Modifying Pre or Post-Processing Actions:

Use the steps below to modify existing pre or post-processing actions for existing recycling algorithms in Oracle Advanced Outbound Telephony.

Prerequisite

To modify pre or post-processing actions, your user account must be assigned the Oracle Advanced Outbound Telephony Administrator responsibility. You must also have an existing algorithm, to which you can add the pre or post-processing actions.

Login

HTML Login URL

Responsibility

Oracle Advanced Outbound Telephony Administrator

Steps

1. Click **Algorithms > Recycling Algorithms**.

    The Recycling Algorithms page appears, displaying a list of all existing recycling algorithms. The Recycling Algorithm page is the default view for the algorithms page.

2. From the list of existing recycling algorithms, click the algorithm name of the algorithm in which you want to modify pre or post-processing actions.

    The Recycling Algorithm Detail page appears, displaying a summary view of all the existing pre and post-processing actions and all the existing conditions.

3. From the Recycling Algorithm Details page, click the **Pre-Processing Action(s)** link to add pre-processing actions, or click the **Post-Processing Action(s)** link to add post-processing actions.

    The Edit Recycling Algorithm Action page appears, displaying a summary view table for pre or post-processing actions (depending on which link you clicked).

4. From the field in the Action column of the summary view table, select the action you want to add and click **Update**.

    > **Note:** Some actions require you to enter further information. The actions that require additional information have "**...**" after their name in the list. If the action you selected requires additional information, when you click **Update**, additional fields will appear, in which you need to enter information. Once you have entered the necessary additional information, click **Update**.

    The selected action is added and the summary view table updates to show the modified action.

5. On the Edit Recycling Algorithm Action page, click the hyperlinked algorithm name.

    The Recycling Algorithm Detail page appears, displaying your modified pre or post-processing action(s) in the shadow area.

6. If you are satisfied with your new pre or post-processing action(s), click **Replace**.

The Recycling Algorithm Detail page refreshes to display the modified pre or post-processing actions.

Removing Pre or Post-Processing Actions:

Use the steps below to remove pre or post-processing actions from existing recycling algorithms in Oracle Advanced Outbound Telephony.

Prerequisite

To remove pre or post-processing actions, your user account must be assigned the Oracle Advanced Outbound Telephony Administrator responsibility. You must also have an existing algorithm with at least one existing pre or post-processing actions.

Login

HTML Login URL

Responsibility

Oracle Advanced Outbound Telephony Administrator

Steps

1. Click **Algorithms > Recycling Algorithms**.

The Recycling Algorithms page appears, displaying a list of all existing recycling algorithms. The Recycling Algorithm page is the default view for the algorithms page.

2. From the list of existing recycling algorithms, click the algorithm name of the algorithm from which you want to remove pre or post-processing actions.

The Recycling Algorithm Detail page appears, displaying a summary view of all the existing pre and post-processing actions and all the existing conditions.

> **Note:** If this is a new algorithm, the summary view will not contain any actions or conditions.

3. From the Recycling Algorithm Details page, click the **Pre-Processing Action(s)** link to remove pre-processing actions, or click the **Post-Processing Action(s)** link to remove post-processing actions.

The Edit Recycling Algorithm Action page appears, displaying a summary view table for pre or post-processing actions (depending on which link you clicked).

4. In the Remove column, click the box for the pre or post-processing action you want to remove.

5. Click **Update**.

   The selected pre or post-processing action is removed.

6. On the Edit Recycling Algorithm Action page, click the hyperlinked algorithm name.

   The Recycling Algorithm Detail page appears.

7. Click **Replace**.

   The Recycling Algorithm Detail page refreshes to remove the selected pre or post-processing action(s).

Adding Algorithm Conditions:

Use the steps below to add algorithm conditions (expressions) to existing recycling algorithms in Oracle Advanced Outbound Telephony.

Prerequisite

To add algorithm conditions, your user account must be assigned the Oracle Advanced Outbound Telephony Administrator responsibility. You must also have an existing algorithm, to which you can add the conditions.

Login

HTML Login URL

Responsibility

Oracle Advanced Outbound Telephony Administrator

Steps

1. Click **Algorithms > Recycling Algorithms**.

   The Recycling Algorithms page appears, displaying a list of all existing recycling algorithms. The Recycling Algorithm page is the default view for the algorithms page.

2. From the list of existing recycling algorithms, click the algorithm name of the algorithm to which you want to add conditions.

   The Recycling Algorithm Detail page appears.

> **Note:** If this is a new algorithm, the summary view will not contain any actions or conditions.

3. From the Recycling Algorithm Details page (Shadow area), click **Root**.

   The Recycling Algorithm Condition Details page appears, displaying two areas:

   - a Sub-Conditions area

   - an Actions performed if no sub-condition is met area

4. Under the Sub-Conditions heading, click **Insert Condition**.

   The Edit Recycling Algorithm Condition page appears, displaying a summary view table for algorithm conditions.

5. From the list in the Expression column, select the condition you want and click **Update**.

   The Expression column expands with additional fields, to allow you to enter the operator and value for the condition.

6. From the field directly after the condition statement, select the operator you want to use for your condition.

7. From the last field, select the value you want to use for your condition and click **Update.**

   The summary view table updates to show your new condition.

   > **Note:** If you want to add multiple expressions to the condition statement, repeat steps 5-7 in the next set of fields below the ones for your current expression, but remember to select how you want the expressions joined from the list in the Expressions Joined By field before clicking **Update**.

   > **Note:** If you want to add additional conditions, repeat steps 4-7 for each additional condition.

8. On the Edit Recycling Algorithm Condition page, click the hyperlinked algorithm name.

   The Recycling Algorithm Detail page appears, displaying your new condition(s) in the shadow area.

9. If you are satisfied with your new algorithm condition(s), click **Replace**.

The Recycling Algorithm Detail page refreshes to display the new condition(s).

Modifying Algorithm Conditions:

Use the steps below to modify recycling algorithm conditions in Oracle Advanced Outbound Telephony.

Prerequisite

To modify recycling algorithm conditions, your user account must be assigned the Oracle Advanced Outbound Telephony Administrator responsibility. Existing algorithm conditions must also be present.

Login

HTML Login URL

Responsibility

Oracle Advanced Outbound Telephony Administrator

Steps

1. Click **Algorithms > Recycling Algorithms**.

   The Recycling Algorithms page appears, displaying a list of all existing recycling algorithms. The Recycling Algorithm page is the default view for the algorithms page.

2. From the list of existing recycling algorithms, click the algorithm name under which the condition you want to modify resides.

   The Recycling Algorithm Details page appears, displaying the summary view of the recycling algorithm.

3. Click **Root**.

   > **Note:** To modify conditions, you must click the next highest level. For example, if you have a condition listed under the Root level, you must click **Root** to modify the condition.

   The Recycling Algorithm Condition Details page appears, displaying a list of all existing top level conditions under it.

   1. To modify the order of the condition statements (if there is more than one condition under the selected level): click the blue sort arrow that appears in front of the condition text you wish to move. Clicking the arrow will move that

condition up or down one place (depending on which way the arrow is facing).

2. To modify the condition: click **Edit** for the condition you want to edit. When the Edit Recycling Algorithm Condition page appears, you can modify the operator and value of the expression by making new selections from the list for each, then clicking **Update**.

3. To add multiple expressions to the condition statement: in the next set of fields below the ones for your current expression, repeat appropriate steps from the Adding Algorithm Conditions, page 6-57 topic. Remember to select how you want the expressions joined from the list in the Expressions Joined By field before clicking **Update**.

4. On the Edit Recycling Algorithm Condition page, click the hyperlinked algorithm name.

   The Recycling Algorithm Detail page appears, displaying your modified condition(s) in the shadow area.

5. If you are satisfied with your modified algorithm condition(s), click **Replace**.

   The Recycling Algorithm Detail page refreshes to display the modified condition(s).

Deleting Algorithm Conditions:

Use the steps below to delete algorithm conditions from existing recycling algorithms in Oracle Advanced Outbound Telephony.

Prerequisite

To delete algorithm conditions, your user account must be assigned the Oracle Advanced Outbound Telephony Administrator responsibility. You must also have an existing algorithm with more than one existing condition, sub condition, or action.

> **Note:** A condition must have at least one sub-condition or action. Therefore, the Oracle Advanced Outbound Telephony HTML Administrator console will not allow you to delete the only condition if no sub-conditions or actions are present.

Login

HTML Login URL

Responsibility

Oracle Advanced Outbound Telephony Administrator

Steps

1. Click **Algorithms > Recycling Algorithms**.

   The Recycling Algorithms page appears, displaying a list of all existing recycling algorithms. The Recycling Algorithm page is the default view for the algorithms page.

2. From the list of existing recycling algorithms, click the algorithm name of the algorithm from which you want to delete conditions.

   The Recycling Algorithm Detail page appears, displaying a summary view of all the existing pre and post-processing actions and all the existing conditions.

3. From the list of existing recycling algorithms, click **Root** to access the top level conditions.

   The Recycling Algorithm Condition Details page appears, displaying all the existing top level conditions.

4. From the Recycling Algorithm Condition Details page, click **Delete** for the condition you want to delete.

   The selected condition is deleted.

5. On the Edit Recycling Algorithm Condition page, click the hyperlinked algorithm name.

   The Recycling Algorithm Detail page appears.

6. Click **Replace**.

   The Recycling Algorithm Detail page refreshes to remove the selected condition(s).

Adding Algorithm Sub-Conditions:

Follow the steps below to add sub-conditions to existing recycling algorithm conditions.

Prerequisite

To add algorithm sub-conditions, your user account must be assigned the Oracle Advanced Outbound Telephony Administrator responsibility. You must also have an existing algorithm and existing condition, to which you can add the sub-conditions.

Login

HTML Login URL

Responsibility

Oracle Advanced Outbound Telephony Administrator

Steps

1. Click **Algorithms > Recycling Algorithms**.

   The Recycling Algorithms page appears, displaying a list of all existing recycling algorithms. The Recycling Algorithm page is the default view for the algorithms page.

2. From the list of existing recycling algorithms, click the algorithm name of the algorithm to which you want to add conditions.

   The Recycling Algorithm Detail page appears, displaying a summary view of all the existing pre and post-processing actions and all the existing conditions.

3. From the Shadow area of the Recycling Algorithm Details page, click **Condition** (for the condition statement to which you want to add a sub-condition).

   The Recycling Algorithm Condition Details page appears, displaying two areas:

   • a Sub-Conditions area

   • an Actions if no sub-condition met area

4. Under the Sub-Conditions heading, click **Insert Condition**.

   The Edit Recycling Algorithm Condition page appears, displaying a summary view table for algorithm conditions.

5. From the Expression column, select the condition you want from the list and click **Update**.

   The Expression column expands with additional fields, to allow you to enter the operator and value for the condition.

6. From the field directly after the condition statement, select the operator you want to use for your condition.

7. From the last field, select the value you want to use for your condition and click **Update.**

   The summary view table updates to show your new condition.

   > **Note:** If you want to add multiple expressions to the condition statement, repeat steps 5-7, but remember to select how you want

the expressions joined from the list in the Expressions Joined By field before clicking **Update**.

> **Note:** If you want to add additional conditions, repeat steps 4-7 for each additional condition.

8. On the Edit Recycling Algorithm Condition page, click the hyperlinked algorithm name.

   The Recycling Algorithm Detail page appears, displaying your new condition(s) in the shadow area.

9. If you are satisfied with your new algorithm condition(s), click **Replace**.

   The Recycling Algorithm Detail page refreshes to display the new condition(s).

Modifying Algorithm Sub-Conditions:

Use the steps below to modify recycling algorithm sub-conditions in Oracle Advanced Outbound Telephony.

Prerequisite

To modify recycling algorithm sub-conditions, your user account must be assigned the Oracle Advanced Outbound Telephony Administrator responsibility. Existing algorithm sub-conditions must also be present.

Login

HTML Login URL

Responsibility

Oracle Advanced Outbound Telephony Administrator

Steps

1. Click **Algorithms > Recycling Algorithms**.

   The Recycling Algorithms page appears, displaying a list of all existing recycling algorithms. The Recycling Algorithm page is the default view for the algorithms page.

2. From the list of existing recycling algorithms, click the algorithm name under which the condition you want to modify resides.

The Recycling Algorithm Details page appears, displaying the summary view of the recycling algorithm.

3. Click **Condition:** for the condition one level above the sub-condition you want to modify.

> **Note:** To modify conditions, you must click the next highest level. For example, if you have a sub-condition listed under a top level condition, you must click **Condition:** for the top level condition to modify the sub-condition under it.

The Recycling Algorithm Condition Details page appears, displaying a list of all existing sub-conditions under the condition you clicked.

1. To modify the order of the condition statements (if there is more than one sub-condition under the selected level): click the blue sort arrow that appears in front of the condition text you wish to move. Clicking the arrow will move that condition up or down one place (depending on which way the arrow is facing).

2. To modify the sub-condition: click **Edit** for the sub-condition you want to edit. When the Edit Recycling Algorithm Condition page appears, you can modify the operator and value of the expression by making new selections from the list for each, then clicking **Update**.

3. To add multiple expressions to the sub-condition statement: in the next set of fields below the ones for your current expression, repeat steps 6-8 from the Adding Algorithm Sub-Conditions, page 6-61 topic. Remember to select how you want the expressions joined from the list in the Expressions Joined By field before clicking **Update**.

4. On the Edit Recycling Algorithm Condition page, click the hyperlinked algorithm name.

The Recycling Algorithm Detail page appears, displaying your modified condition(s) in the shadow area.

5. If you are satisfied with your modified algorithm condition(s), click **Replace**.

The Recycling Algorithm Detail page refreshes to display the modified condition(s).

Deleting Algorithm Sub-Conditions:

Use the steps below to delete algorithm conditions from existing recycling algorithms in Oracle Advanced Outbound Telephony.

Prerequisite

To delete algorithm conditions, your user account must be assigned the Oracle

Advanced Outbound Telephony Administrator responsibility. You must also have an existing algorithm with more than one existing condition, sub condition, or action.

> **Note:** A sub-condition must have at least one sub-condition or action. Therefore, the Oracle Advanced Outbound Telephony HTML Administrator console will not allow you to delete the only sub-condition if no other sub-conditions or actions are present.

Login

HTML Login URL

Responsibility

Oracle Advanced Outbound Telephony Administrator

Steps

1. Click **Algorithms > Recycling Algorithms**.

   The Recycling Algorithms page appears, displaying a list of all existing recycling algorithms. The Recycling Algorithm page is the default view for the algorithms page.

2. From the list of existing recycling algorithms, click the algorithm name of the algorithm from which you want to delete sub-conditions.

   The Recycling Algorithm Detail page appears, displaying a summary view of all the existing pre and post-processing actions and all the existing conditions.

3. From the list of existing recycling algorithms, click **Condition:** for the algorithm condition one level *above* the sub-condition you want to delete.

   The Recycling Algorithm Condition Details page appears, displaying all the existing sub-conditions under the selected condition.

4. From the Recycling Algorithm Condition Details page, click **Delete** for the sub-condition you want to delete.

   The selected sub-condition is deleted.

5. On the Edit Recycling Algorithm Condition page, click the hyperlinked algorithm name.

   The Recycling Algorithm Detail page appears.

6. Click **Replace**.

The Recycling Algorithm Detail page refreshes to remove the selected condition(s).

Adding Actions Performed if no Sub-Conditions are met:

Use the steps below to add actions if no sub-conditions are met to existing algorithm conditions or sub-conditions in Oracle Advanced Outbound Telephony.

Prerequisite

To add actions if no sub-condition is met, your user account must be assigned the Oracle Advanced Outbound Telephony Administrator responsibility. You must also have an existing algorithm, to which you can add the actions.

Login

HTML Login URL

Responsibility

Oracle Advanced Outbound Telephony Administrator

Steps

1. Click **Algorithms > Recycling Algorithms**.

   The Recycling Algorithms page appears, displaying a list of all existing recycling algorithms. The Recycling Algorithm page is the default view for the algorithms page.

2. From the list of existing recycling algorithms, click the algorithm name of the algorithm to which you want to add conditions.

   The Recycling Algorithm Detail page appears, displaying a summary view of all the existing pre and post-processing actions and all the existing conditions.

   > **Note:** If this is a new algorithm, the summary view will not contain any actions or conditions.

3. From the Recycling Algorithm Details page, click **Root** (if you want to add actions to a top level condition), or click **Condition:** for the condition under which the sub-condition to which you want to add an action resides.

   The Recycling Algorithm Condition Details page appears, displaying two areas:

   - a Sub-Conditions area

   - an Actions if no sub-condition met area

4. Under the Actions if no sub-condition met field, click **Insert Action**.

   The Edit Recycling Algorithm Action page appears, displaying a summary view table for actions.

5. From the Action column of the summary view table, select the action you want to add and click **Update**.

   > **Note:** Some actions require you to enter further information. The actions that require additional information have "**...**" after their name in the list. If the action you selected requires additional information, when you click **Update**, additional fields will appear, in which you need to enter information. Once you have entered the necessary additional information, click **Update**.

   The selected action is added and the summary view table updates to show the new action.

6. On the Edit Recycling Algorithm Action page, click the hyperlinked algorithm name.

   The Recycling Algorithm Detail page appears, displaying your new action(s) in the shadow area.

7. If you are satisfied with your new algorithm action(s), click **Replace**.

   The Recycling Algorithm Detail page refreshes to display the new action(s).

Modifying Actions Performed if no Sub-Conditions are met:

Use the steps below to modify actions if no sub-conditions are met in existing algorithm conditions or sub-conditions in Oracle Advanced Outbound Telephony.

Prerequisite

To modify actions if no sub-condition is met, your user account must be assigned the Oracle Advanced Outbound Telephony Administrator responsibility. You must also have an existing algorithm with actions.

Login

HTML Login URL

Responsibility

Oracle Advanced Outbound Telephony Administrator

Steps

1. Click **Algorithms > Recycling Algorithms**.

   The Recycling Algorithms page appears, displaying a list of all existing recycling algorithms. The Recycling Algorithm page is the default view for the algorithms page.

2. From the list of existing recycling algorithms, click the algorithm name of the algorithm from which you want to modify actions if no sub-condition are met.

   The Recycling Algorithm Detail page appears, displaying a summary view of all the existing pre and post-processing actions and all the existing conditions.

3. From the Recycling Algorithm Details page, click **Root** (if you want to modify actions from a top level condition), or click **Condition:** for the condition under which the sub-condition in which you want to modify an action resides.

   The Recycling Algorithm Condition Details page appears, displaying two areas:

   • a Sub-Conditions area

   • an Actions if no sub-condition met area

4. From the Sub-Conditions met area, click the condition expression under which the action you want to modify resides.

   > **Note:** If the action is linked to the root level of the condition, it will appear under the Actions if no sub-condition met area. You do not need to click a condition expression. You can modify the action directly from this page by clicking **Edit**.

   The Recycling Algorithm Conditions page updates to display any existing sub-conditions or actions under the condition expression you clicked.

5. Under the Actions if no sub-condition met area, click **Edit** for the action you want to modify.

   1. To modify the order of the actions (if there is more than one action): click the blue sort arrow that appears in front of the action text you wish to move. Clicking the arrow will move that action up or down one place (depending on which way the arrow is facing).

   2. To modify the action: click **Edit** for the action you want to modify. When the Edit Recycling Algorithm Action page appears, you can modify the action by making new selections from the list for its components, then clicking **Update**.

3. To add additional actions: from the Action column of the summary view table, click the arrow in the field *below* the existing action and select the action you want to add and click **Update**.

> **Note:** Some actions require you to enter further information. The actions that require additional information have "**...**" after their name in the list. If the action you selected requires additional information, when you click **Update**, additional fields will appear, in which you need to enter information. Once you have entered the necessary additional information, click **Update**.

The selected action is modified and the summary view table updates to show the modified action.

6. On the Edit Recycling Algorithm Action page, click the hyperlinked algorithm name.

The Recycling Algorithm Detail page appears, displaying your modified action(s) in the shadow area.

7. If you are satisfied with your modified algorithm action(s), click **Replace**.

The Recycling Algorithm Detail page refreshes to display the modified action(s).

Deleting Actions Performed if no Sub-Conditions are met:

Use the steps below to delete actions if no sub-conditions are met from existing algorithm conditions or sub-conditions in Oracle Advanced Outbound Telephony.

Prerequisite

To delete actions if no sub-condition is met, your user account must be assigned the Oracle Advanced Outbound Telephony Administrator responsibility. You must also have an existing algorithm with actions.

Login

HTML Login URL

Responsibility

Oracle Advanced Outbound Telephony Administrator

Steps

1. Click **Algorithms > Recycling Algorithms**.

   The Recycling Algorithms page appears, displaying a list of all existing recycling algorithms. The Recycling Algorithm page is the default view for the algorithms page.

2. From the list of existing recycling algorithms, click the algorithm name of the algorithm from which you want to delete actions if no sub-condition are met.

   The Recycling Algorithm Detail page appears, displaying a summary view of all the existing pre and post-processing actions and all the existing conditions.

3. From the Recycling Algorithm Details page, click **Root** (if you want to delete actions from a top level condition), or click **Condition:** for the condition under which the sub-condition from which you want to delete an action resides.

   The Recycling Algorithm Condition Details page appears, displaying two areas:

   • a Sub-Conditions area

   • an Actions if no sub-condition met area

4. From the Sub-Conditions met area, click the condition expression under which the action you want to delete resides.

   > **Note:** If the action is linked to the root level of the condition, it will appear under the Actions if no sub-condition met area. You do not need to click a condition expression. You can delete the action directly from this page by clicking **Delete**.

   The Recycling Algorithm Condition Details page updates to display any existing sub-conditions or actions under the condition expression you clicked.

5. Click **Delete** for the action you want to delete.

   The selected action is deleted.

6. On the Edit Recycling Algorithm Action page, click the hyperlinked algorithm name.

   The Recycling Algorithm Detail page appears.

7. Click **Replace**.

   The Recycling Algorithm Detail page refreshes to remove the selected action(s).

Record Filters

Use this page to create, modify, and remove record filters.

Tasks

You can perform the following tasks:

- Viewing and Sorting Items, page 6-71

- Creating Record Filters, page 6-72

- Modifying Record Filters, page 6-75

- Removing Record Filters, page 6-77

- Using the Record Filter Shadow Feature, page 6-77

Viewing and Sorting Items:

There are six tabs in the Oracle Advanced Outbound Telephony HTML Administration console, including: Campaigns, Algorithms, Calling Calendars, Telephony, Performance, and Administration. Many of these pages contain subtab menus.

Use the steps below to view or sort the contents of a selected page in the Oracle Advanced Outbound Telephony HTML Administration console.

Prerequisite

To access the Oracle Advanced Outbound Telephony HTML Administration console, your user account must be assigned the Oracle Advanced Outbound Telephony Administrator responsibility.

Login

HTML Login URL

Responsibility

Oracle Advanced Outbound Telephony Administrator

Steps

1. From the Oracle Advanced Outbound Telephony HTML Administration console, click the tab you want to view.

The selected page appears, displaying a summary view table of its contents.

2. Click the subtab menu item you want to view (if other than the default).

   The selected subtab menu item's page appears, displaying a summary view table of its contents.

   > **Note:** The Oracle Advanced Outbound Telephony HTML Administration console always defaults to the first subtab's contents.

3. If there are more items than can fit in the page, click **First**, **Previous**, **Next**, or **Last** to continue viewing the items.

4. Click the column header by which you want to sort the contents of the summary view table.

   > **Note:** You can sort the summary view table items in either ascending or descending order by clicking any of the underlined column headers.

   A blue sort arrow appears to the right of the column heading. This arrow indicates whether you are sorting in ascending or descending order.

5. Click the arrow to reverse the sort order.

Related Topics:

- Creating Record Filters, page 6-72

- Modifying Record Filters, page 6-75

- Removing Record Filters, page 6-77

Creating Record Filters:

Use the steps below to create record filters in Oracle Advanced Outbound Telephony.

Prerequisite

To create record filters, your user account must be assigned the Oracle Advanced Outbound Telephony Administrator responsibility.

Login

HTML Login URL

Responsibility

Oracle Advanced Outbound Telephony Administrator

Steps

1. Click the **Algorithms** tab.

   The Recycling Algorithms page appears, displaying a list of all existing recycling algorithms. The Recycling Algorithm page is the default view for the algorithms page.

2. On the Recycling Algorithms page, click the **Record Filters** subtab.

   The Record Filters page appears, displaying a list of the existing record filters.

3. On the Record Filters page, click **Create Record Filter**.

   The Create New Record Filter page appears.

4. In the Name field, type a name for the new record filter.

   > **Note:** Record filter names have a 64 character limit and only the following characters are supported:
   >
   > - A-Z
   >
   > - 0-9
   >
   > - underscore, space, and hyphen

5. In the Select Source Type field, select the source type you want to use.

   > **Note:** Source types define how fields from the database (typically TCA) map to the columns of a list entry.
   >
   > Oracle Advanced Outbound Telephony recycling algorithms are directly associated to source types because they define which fields are present in a list.
   >
   > Oracle Advanced Outbound Telephony supports two source types:
   >
   > - B to B - Business to Business (Organization Contacts)

- B to C - Business to Consumer (Persons)

> **Note:** You can click **Clear** to delete the algorithm name and selected source type.

6. Click **Next**.

   The Record Filter Rules page appears.

7. On the Record Filter Rules page, click **Insert Rule**.

   The Record Filter Create Rule page appears, displaying a summary view table for record filter conditions.

   > **Note:** If this is a new record filter, the summary view will not contain any record filters.

8. From the Field column, type the name of the record field against which you want to run the record filters.

9. From the Operator column, select the operator you want to use in your record filters from the list.

10. From the Value field, type the value you want to use for your record filters.

11. Click **Create**.

    The Record Filter Edit Rule page updates to display a confirmation note, stating that the record filter rule was created successfully.

12. If you want to add additional expressions to the same condition: repeat steps 8-11 in the next set of fields below the current expression, and click **Create**.

13. If you want to add additional conditions to the same rule:

    1. From the list in the Add field, select the number of additional conditions you want to add, and click **Go**.

       The Record Filter Create Rule page updates to display a second summary view table, in which you can create additional conditions for the record filter rule.

    2. Repeat steps 8-11 (in the new summary view table fields), and click **Create**.

14. Click **Done**.

    The Record Filter Rules page appears, displaying the new rule(s).

15. On the Record Filter Rules page, click the hyperlinked filter name.

    The Record Filter Details page appears, displaying your new record filter(s) in the shadow area.

16. If you are satisfied with your new record filter(s), click **Replace**.

    The Record Filter Details page refreshes to display the new record filter(s).

Related Topics:

Modifying Record Filters:

Use the steps below to modify record filters in Oracle Advanced Outbound Telephony.

Prerequisite

To modify record filters, your user account must be assigned the Oracle Advanced Outbound Telephony Administrator responsibility.

Login

HTML Login URL

Responsibility

Oracle Advanced Outbound Telephony Administrator

Steps

1. Click the **Algorithms** tab.

   The Recycling Algorithms page appears, displaying a list of all existing recycling algorithms. The Recycling Algorithm page is the default view for the algorithms page.

2. On the Recycling Algorithms page, click the **Record Filters** subtab.

   The Record Filters page appears, displaying a summary view table of the existing record filters.

3. From the Name column in the summary view table, click the name of the record

filter you want to modify.

The Record Filter Details page appears, displaying all of the existing rules and conditions for the selected record filter.

4. Click **Edit**.

   The Record Filter Rules page appears, displaying a list of all the existing rules.

5. From the list of rules, click Edit for the rule you want to modify.

   The Record Filter Edit Rule page appears, displaying a summary view table for the rule conditions under that rule.

6. Make the modifications you want to the expression or condition.

   1. To change how expressions are joined together in the condition (if you have more than one expression): click the **AND** or the **OR** radio button in the Join Condition area (at the top of the summary view table), and click **Update**.

   2. To remove an expression from a condition, or a condition from a rule: in the Remove column of the summary view table, click the box for the expression or condition you want to remove, and click **Update**.

   3. To modify any of the components of an expression: enter a new field name in the Field field, select a new operator from the list in the Operator field, or type new information in the Value field, and click **Update**.

      The Record Filter Edit Rule page updates to display a confirmation note stating that the record filter was updated successfully.

7. Click **Done**.

   You return to the Record Filter Rules page and the modified rules are displayed.

8. On the Record Filter Rules page, click the hyperlinked filter name.

   The Record Filter Details page appears, displaying your modified record filter(s) in the shadow area.

9. If you are satisfied with your modified record filter(s), click **Replace**.

   The Record Filter Details page refreshes to display the modified record filter(s).

Related Topics:

- Viewing and Sorting Items, page 6-71

- Creating Record Filters, page 6-72

- Removing Record Filters, page 6-77

Removing Record Filters:

Use the steps below to remove record filters in Oracle Advanced Outbound Telephony.

Prerequisite

To remove record filters, your user account must be assigned the Oracle Advanced Outbound Telephony Administrator responsibility.

Login

HTML Login URL

Responsibility

Oracle Advanced Outbound Telephony Administrator

Steps

1. Click the **Algorithms** tab.

   The Recycling Algorithms page appears, displaying a list of all existing recycling algorithms. The Recycling Algorithm page is the default view for the algorithms page.

2. On the Recycling Algorithms page, click the **Record Filters** subtab.

   The Record Filters page appears, displaying a list of the existing record filters.

3. In the Remove column, click the box for the record filter you want to remove.

4. Click **Update**.

   The selected record filter is removed.

Related Topics:

- Viewing and Sorting Items, page 6-71

- Creating Record Filters, page 6-72

- Modifying Record Filters, page 6-75

Using the Record Filter Shadow Feature:

Oracle Advanced Outbound Telephony automatically creates a duplicate, or shadow,

version of each record filter. This shadow version is displayed to the right of the original or "live" version on the Record Filter Details page. You can use the shadow version to make changes to or manipulate the record filter without affecting the original. Once you are satisfied with your changes, you can click **Replace** to apply the changes to the original version.

> **Caution:** Before you click **Replace**, ensure your modified record filter is valid and will not generate errors. After you click **Replace** and overwrite the original record filter, you cannot retrieve the original filter.

Validation Rules

Use the Validation Rules page to create, modify, or remove validation rules for Oracle Advanced Outbound Telephony.

Tasks

- Viewing and Sorting Items, page 6-78

- Creating Validation Rules, page 6-80

- Modifying Validation Rules, page 6-81

- Removing Validation Rules, page 6-83

- Removing Validation Rule Actions, page 6-84

Viewing and Sorting Items:

There are six tabs in the Oracle Advanced Outbound Telephony HTML Administration console, including: Campaigns, Algorithms, Calling Calendars, Telephony, Performance, and Administration. Many of these pages contain subtab menus.

Use the steps below to view or sort the contents of a selected page in the Oracle Advanced Outbound Telephony HTML Administration console.

Prerequisite

To access the Oracle Advanced Outbound Telephony HTML Administration console, your user account must be assigned the Oracle Advanced Outbound Telephony Administrator responsibility.

Login

HTML Login URL

Responsibility

Oracle Advanced Outbound Telephony Administrator

Steps

1. From the Oracle Advanced Outbound Telephony HTML Administration console, click the tab you want to view.

   The selected page appears, displaying a summary view table of its contents.

2. Click the subtab menu item you want to view (if other than the default).

   The selected subtab menu item's page appears, displaying a summary view table of its contents.

   > **Note:** The Oracle Advanced Outbound Telephony HTML Administration console always defaults to the first subtab's contents.

3. If there are more items than can fit in the page, click **First**, **Previous**, **Next**, or **Last** to continue viewing the items.

4. Click the column header by which you want to sort the contents of the summary view table.

   > **Note:** You can sort the summary view table items in either ascending or descending order by clicking any of the underlined column headers.

   A blue sort arrow appears to the right of the column heading. This arrow indicates whether you are sorting in ascending or descending order.

5. Click the arrow to reverse the sort order.

Related Topics:

- Creating Validation Rules, page 6-80

- Modifying Validation Rules, page 6-81

- Removing Validation Rules, page 6-83

- Removing Validation Rule Actions, page 6-84

Creating Validation Rules:

Use the steps below to create validation rules in Oracle Advanced Outbound Telephony.

Prerequisite

To create validation rules, your user account must be assigned the Oracle Advanced Outbound Telephony Administrator responsibility.

Login

HTML Login URL

Responsibility

Oracle Advanced Outbound Telephony Administrator

Steps

1. Click the **Algorithms** tab.

   The Recycling Algorithms page appears, displaying a list of all existing recycling algorithms. The Recycling Algorithm page is the default view for the algorithms page.

2. Click the **Validation Rules** subtab.

   The Validation Rules page appears, displaying a summary view table of all existing validation rules.

3. Click **Create Validation Rule**.

   The Create Validation Rule page appears.

4. In the Rule Name field, type a name for the validation rule and click **Create**.

   > **Note:** Rule names have a 64 character limit and only the following characters are supported:

   - A-Z

   - 0-9

   - underscore, space, and hyphen

   The Validation Rule Details page appears.

5. On the Validation Rule Details page, click **Insert Action**.

   The Edit Validation Rule Actions page appears, displaying a summary view table of all existing validation actions.

   > **Note:** If this is a new validation rule, the summary view will not contain any actions.

6. From the list in the action column, select the action you want to use for your validation rule, and click **Update**.

   > **Note:** Some actions require you to enter further information. The actions that require additional information have "**...**" after their name in the list. If the action you selected requires additional information, when you click **Update**, additional fields will appear, in which you need to enter information. Once you have entered the necessary additional information, click **Update**.

   The selected action is added and the summary view table updates to show the new action.

Related Topics:

- Viewing and Sorting Items, page 6-78

- Modifying Validation Rules, page 6-81

- Removing Validation Rules, page 6-83

- Removing Validation Rule Actions, page 6-84

Modifying Validation Rules:

Use the steps below to modify validation rules in Oracle Advanced Outbound Telephony.

Prerequisite

To modify validation rules, your user account must be assigned the Oracle Advanced Outbound Telephony Administrator responsibility. You must already have an existing validation rule.

Login

HTML Login URL

Responsibility

Oracle Advanced Outbound Telephony Administrator

Steps

1. Click the **Algorithms** tab.

   The Recycling Algorithms page appears, displaying a list of all existing recycling algorithms. The Recycling Algorithm page is the default view for the algorithms page.

2. Click the **Validation Rules** subtab.

   The Validation Rules page appears, displaying a summary view table of all existing validation rules.

3. From the Name column, click the validation rule name for the validation rule you want to modify.

   The Validation Rule Details page appears, displaying all existing validation rule actions under the selected validation rule.

4. Modify the validation rules and rule actions.

   1. To modify the order of the actions (if there is more than one action): click the blue sort arrow that appears in front of the action text you wish to move. Clicking the arrow will move that action up or down one place (depending on which way the arrow is facing).

   2. To edit the properties of a validation rule action: on the Validation Rule Details page, click **Edit**. When the Edit Validation Rule Actions page appears, from the list(s) in the action column, you can make other selections, and click **Update**.

   3. To add additional actions to the validation rule: click **Edit**. When the Edit Validation Rule Actions page appears, from the list below the last existing action in the action column, select the action you want to use for your validation rule, and click **Update**.

   4. To remove actions from a validation rule, click **Edit**. When the Edit Validation Rule Actions page appears, from the Remove column of the summary view table, click the box for the action you want to remove, and click **Update**.

      > **Note:** Some actions require you to enter further information. The actions that require additional information have "**...**" after their name in the list. If the action you selected requires additional information, when you click **Update**, additional

fields will appear, in which you need to enter information. Once you have entered the necessary additional information, click **Update**.

The Edit Validation Rule Actions page updates to display the modified list of actions.

Related Topics:

- Viewing and Sorting Items, page 6-78

- Creating Validation Rules, page 6-80

- Removing Validation Rules, page 6-83

- Removing Validation Rule Actions, page 6-84

Removing Validation Rules:

Use the steps below to remove validation rules in Oracle Advanced Outbound Telephony.

Prerequisite:

To remove validation rules, your user account must be assigned the Oracle Advanced Outbound Telephony Administrator responsibility.

Login

HTML Login URL

Responsibility

Oracle Advanced Outbound Telephony Administrator

Steps

1. Click the **Algorithms** tab.

   The Recycling Algorithms page appears, displaying a list of all existing recycling algorithms. The Recycling Algorithm page is the default view for the algorithms page.

2. Click the **Validation Rules** subtab.

The Validation Rules page appears, displaying a summary view table of all existing validation rules.

3. From the Remove column of the summary view table, click the box for the rule you want to remove.

4. Click **Update**.

   The Edit Validation Rule Actions page updates and the selected rule is removed from the list.

Related Topics:

- Viewing and Sorting Items, page 6-78

- Creating Validation Rules, page 6-80

- Modifying Validation Rules, page 6-81

- Removing Validation Rule Actions, page 6-84

Removing Validation Rule Actions:

Use the steps below to remove validation rules in Oracle Advanced Outbound Telephony.

Prerequisite:

To remove validation rules, your user account must be assigned the Oracle Advanced Outbound Telephony Administrator responsibility. You must have an existing validation rule with more than one action.

> **Note:** A validation rule must have at least one action. Therefore, the Oracle Advanced Outbound Telephony HTML Administrator console will not allow you to delete the only action if no other actions are present.

Login

HTML Login URL

Responsibility

Oracle Advanced Outbound Telephony Administrator

Steps

1. Click the **Algorithms** tab.

   The Recycling Algorithms page appears, displaying a list of all existing recycling algorithms. The Recycling Algorithm page is the default view for the algorithms page.

2. Click the **Validation Rules** subtab.

   The Validation Rules page appears, displaying a summary view table of all existing validation rules.

3. From the Name column of the summary view table, click the name of the validation rule that contains the action you want to remove.

4. From the Remove column of the summary view table, click the box for the rule you want to remove.

5. Click **Update**.

   The Edit Validation Rule Actions page updates and the selected action is removed from the list.

Related Topics:

- Viewing and Sorting Items, page 6-78

- Creating Validation Rules, page 6-80

- Modifying Validation Rules, page 6-81

- Removing Validation Rules, page 6-83

Country Calendars

Use the Country Calendars page to create, modify and remove country calendars in Oracle Advanced Outbound Telephony. You can also create holidays or exceptions for the country calendars.

Tasks

You can perform the following tasks:

- Viewing and Sorting Items, page 6-86

- Creating Country Calendars, page 6-87

- Modifying Country Calendars, page 6-90

- Using the Calendar Inheritance Feature, page 6-92

- Uninheriting Calendars, page 6-94

- Creating Holidays and Exceptions, page 6-95

- Assigning Holidays and Exceptions to Calendars, page 6-98

- Unassigning Holidays and Exceptions From Calendars, page 6-100

- Removing Holidays and Exceptions, page 6-101

Viewing and Sorting Items:

There are six tabs in the Oracle Advanced Outbound Telephony HTML Administration console, including: Campaigns, Algorithms, Calling Calendars, Telephony, Performance, and Administration. Many of these pages contain subtab menus.

Use the steps below to view or sort the contents of a selected page in the Oracle Advanced Outbound Telephony HTML Administration console.

Prerequisite

To access the Oracle Advanced Outbound Telephony HTML Administration console, your user account must be assigned the Oracle Advanced Outbound Telephony Administrator responsibility.

Login

HTML Login URL

Responsibility

Oracle Advanced Outbound Telephony Administrator

Steps

1. From the Oracle Advanced Outbound Telephony HTML Administration console, click the tab you want to view.

   The selected page appears, displaying a summary view table of its contents.

2. Click the subtab menu item you want to view (if other than the default).

   The selected subtab menu item's page appears, displaying a summary view table of its contents.

> **Note:** The Oracle Advanced Outbound Telephony HTML Administration console always defaults to the first subtab's contents.

3. If there are more items than can fit in the page, click **First**, **Previous**, **Next**, or **Last** to continue viewing the items.

4. Click the column header by which you want to sort the contents of the summary view table.

   > **Note:** You can sort the summary view table items in either ascending or descending order by clicking any of the underlined column headers.

   A blue sort arrow appears to the right of the column heading. This arrow indicates whether you are sorting in ascending or descending order.

5. Click the arrow to reverse the sort order.

Related Topics:

- Creating Country Calendars, page 6-87

- Modifying Country Calendars, page 6-90

- Using the Calendar Inheritance Feature, page 6-92

- Uninheriting Calendars, page 6-94

- Creating Holidays and Exceptions, page 6-95

- Assigning Holidays and Exceptions to Calendars, page 6-98

- Unassigning Holidays and Exceptions From Calendars, page 6-100

- Removing Holidays and Exceptions, page 6-101

Creating Country Calendars:

Use the steps below to create country calendars in Oracle Advanced Outbound Telephony.

Prerequisite

To create country calendars, your user account must be assigned the Oracle Advanced

Outbound Telephony Administrator responsibility.

Login

HTML Login URL

Responsibility

Oracle Advanced Outbound Telephony Administrator

Steps

1. Click the **Calling Calendars** tab.

   The Country Calendars page appears, displaying a list of all existing country calendars. The Country Calendars page is the default view for the Calling Calendars page.

2. On the Country Calendars page, click **Create Calendar**.

   The Create Country Calendar page appears.

3. In the Calendar Name field, type a name for the new country calendar.

   > **Note:** Calendar names have a 64 character limit and only the following characters are supported:

   - A-Z

   - 0-9

   - underscore, space, and hyphen

4. From the list in the Country Name field, select the country you want to associate with the new country calendar.

5. You can create a country calendar by two different methods: you can copy and existing country calendar, or you can create a completely new country calendar. Click the appropriate radio button to select the method by which you will create the country calendar.

   > **Note:** The option to create a country calendar by copying an existing calendar is only present when at least one country calendar already exists.

   1. To create a country calendar by using an existing country calendar as a model,

select the **Copy Country Calendar** option and select the country you want to use from the list in the adjacent field.

2. To create a completely new country calendar, select the **Create New Calendar** option.

6. Click **Create**.

The Country Calendar Details page appears.

7. From the calendar, click the calendar region corresponding to the time you want the calendar to begin calling on the day you want to start calling (example - Monday at 9:00).

The Calendar Region Details page appears.

8. From the View/Edit Calendar list, select **Edit Calendar Callable Regions**.

> **Note:** To open to the Calendar Region Details page, you can click anywhere in the calendar; however, by clicking the day and time you want to begin calling, you automatically populate the week day and start time fields in the Calendar Region Details page.

9. From the list in the Region Type field, select **Callable** if you want to add callable hours, or select **Not callable** if you want to add non-callable hours.

10. In the Start Time Hour and Minute fields, if the start time has not automatically defaulted to the time you want the country calendar to begin taking effect, select the hour and minute from the respective lists.

> **Note:** All times in the Hour field are displayed in 24 hour format (0:00 - 24:00). The Minute field allows you to select between **00** (on the hour) and **30** (on the half-hour) time increments.

11. In the End Time Hour and Minute fields, select the hour and minute from the respective lists. The end time is the time at which your country calendar will terminate calling.

12. In the Copy To area, select the days of the week to which you wish to copy this calling schedule (if any).

> **Note:** Copying the calling schedule in this way is not required; however, if your calling schedule will not vary greatly between days of the week, this method provides a quick means to populate a baseline calling calendar. You can always go back to the

individual days and modify the specific calling times.

13. Click **Apply**.

The country calendar is created and you return to the Country Calendar Details page.

Related Topics:

- Viewing and Sorting Items, page 6-86

- Modifying Country Calendars, page 6-90

- Using the Calendar Inheritance Feature, page 6-92

- Uninheriting Calendars, page 6-94

- Creating Holidays and Exceptions, page 6-95

- Assigning Holidays and Exceptions to Calendars, page 6-98

- Unassigning Holidays and Exceptions From Calendars, page 6-100

- Removing Holidays and Exceptions, page 6-101

Modifying Country Calendars:

Use the steps below to modify country calendars in Oracle Advanced Outbound Telephony.

Prerequisite

To modify country calendars, your user account must be assigned the Oracle Advanced Outbound Telephony Administrator responsibility.

Login

HTML Login URL

Responsibility

Oracle Advanced Outbound Telephony Administrator

Steps

1. Click the **Calling Calendars** tab.

   The Country Calendars page appears, displaying a list of all existing country calendars. The Country Calendars page is the default view for the Calling Calendars page.

2. From the Calendar Name column, click the calendar name of the country calendar you want to modify.

   The Country Calendar Details page appears, displaying the calendar.

3. From the calendar, click the calendar region corresponding to the time you want the calendar to begin calling on the day you want to start calling (example - Monday at 9:00).

   The Calendar Region Details page appears.

4. From the View/Edit Calendar list, select **Edit Calendar Callable Regions**.

   > **Note:** To get to the Calendar Region Details page, you can click anywhere in the calendar; however, by clicking the day and time you want to begin calling, you automatically populate the week day and start time fields in the Calendar Region Details page.

5. From the list in the Region Type field, select **Callable** if you want to change the designated time period to callable hours, or select **Not callable** if you want change the designated time period to non-callable hours.

6. In the Start Time Hour and Minute fields, if the start time has not automatically defaulted to the time you want to begin calling, select the hour and minute from the respective lists.

   > **Note:** All times in the Hour field are displayed in 24 hour format (0:00 - 24:00). The Minute field allows you to select between **00** (on the hour) and **30** (on the half-hour) time increments.

7. In the End Time Hour and Minute fields, select the hour and minute from the respective lists.

8. In the Copy To area, select the days of the week to which you wish to copy this calling schedule (if any).

   > **Note:** Copying the calling schedule in this way is not required;

however, if your calling schedule will not vary greatly between days of the week, this method provides a quick means to populate a baseline calling calendar. You can always go back to the individual days and modify the specific calling times.

9. Click **Apply**.

   The country calendar is created and you return to the Country Calendar Details page.

Related Topics:

- Viewing and Sorting Items, page 6-86

- Creating Country Calendars, page 6-87

- Using the Calendar Inheritance Feature, page 6-92

- Uninheriting Calendars, page 6-94

- Creating Holidays and Exceptions, page 6-95

- Assigning Holidays and Exceptions to Calendars, page 6-98

- Unassigning Holidays and Exceptions From Calendars, page 6-100

- Removing Holidays and Exceptions, page 6-101

Using the Calendar Inheritance Feature:

The inheritance of calendars allows the definition of one calendar to be used as part of a definition for another calendar.

Instead of using a base template calendar, you can copy any existing calendar and use it as a basis to build another calendar. Changing the "base template" calendar is cumbersome because you must identify and make modifications to all calendars that have previously used the "base template" calendar. The inheritance feature will allow a change to a parent calendar to propagate across all calendars that have elected to inherit the parent calendar definition.

Each calendar that inherits a parent calendars information becomes a child of that parent calendar and is listed under the parent calendar on the main calendar page (for each calendar type). You can view the child calendar(s) of any parent calendar by clicking the plus sign (+) next to the parent calendar's name.

Calendars are created that often reflect legal restrictions for an area. These calendars are used as a basis to build other calendars. If there should be any legislative changes, the

inheritance feature will quickly propagate the changes and facilitate compliances toward any legal changes.

Follow the steps below to use the calendar inheritance feature.

Prerequisite

To use the calendar inheritance feature, your user account must be assigned the Oracle Advanced Outbound Telephony Administrator responsibility. A calendar of the same type (country, region, user defined) must already exist, from which you can inherit information.

Login

HTML Login URL

Responsibility

Oracle Advanced Outbound Telephony Administrator

Steps

1. Click the **Calling Calendars** tab.

   The Country Calendars page appears, displaying a list of all existing country calendars. The Country Calendars page is the default view for the Calling Calendars page.

2. Click the subtab for the appropriate calendar type.

   Your options are:

   - Country Calendar

   - Region Calendar

   - User Defined Calendar

3. In the Calendar Name column, click the hyperlinked calendar name for the calendar TO WHICH you want to inherit information.

   The Calendar Details page appears for the appropriate calendar type.

4. From the Inherit From list, select the calendar FROM WHICH you want to inherit information.

5. Click **Inherit**.

   The information from the "inherit from" or parent calendar is propagated to the

selected or child calendar.

Related Topics:

- Viewing and Sorting Items, page 6-86

- Creating Country Calendars, page 6-87

- Modifying Country Calendars, page 6-90

- Uninheriting Calendars, page 6-94

- Creating Holidays and Exceptions, page 6-95

- Assigning Holidays and Exceptions to Calendars, page 6-98

- Unassigning Holidays and Exceptions From Calendars, page 6-100

- Removing Holidays and Exceptions, page 6-101

Uninheriting Calendars:

Oracle Advanced Outbound Telephony allows you to uninherit a calendar without deleting the calendar.

Follow the steps below to uninherit a calendar.

Prerequisite

To use the calendar inheritance feature, your user account must be assigned the Oracle Advanced Outbound Telephony Administrator responsibility. The calendar you want to uninherit must already be inherited to a calendar (the calendar must already be a child of another calendar).

Login

HTML Login URL

Responsibility

Oracle Advanced Outbound Telephony Administrator

Steps

1. Click the **Calling Calendars** tab.

   The Country Calendars page appears, displaying a list of all existing country

calendars. The Country Calendars page is the default view for the Calling Calendars page.

2. Click the subtab for the appropriate calendar type.

   Your options are:

   • Country Calendar

   • Region Calendar

   • User Defined Calendar

3. In the Calendar Name column, click the plus sign (+) for the appropriate parent calendar. This expands the parent calendar to show all of its child calendars.

4. Click the hyperlinked name of the child calendar you want to uninherit.

   The Calendar Details page appears for the selected child calendar.

5. Click **Uninherit**.

   The child calendar is uninherited from the parent calendar. The former child calendar will now appear on its own in the summary view table on the main calendar page for the selected calendar type (Country, Region, or User Defined).

Related Topics:

Creating Holidays and Exceptions:

Use the steps below to create holidays or exceptions for use with calling calendars in Oracle Advanced Outbound Telephony.

Prerequisite

To create holidays or exceptions for use with calling calendars, your user account must be assigned the Oracle Advanced Outbound Telephony Administrator responsibility.

Login

HTML Login URL

Responsibility

Oracle Advanced Outbound Telephony Administrator

Steps

1. Click the **Calling Calendars** tab.

2. Click the **Holidays and Exceptions** subtab.

   The Holidays and Exceptions page appears, displaying a summary view table of all existing holidays and exceptions.

3. Click **Create Exception**.

   The Create Exception page appears.

4. In the Exception Name field, type a name for the holiday or exception you are creating.

5. In the fields provided in the Exception Type area, you can specify when you want the exception to occur. You can set an exception to happen on a given date each year, on a given date once ever, or on a regularly occurring interval (example - first Monday in January).

   1. To set the exception to occur on a specified date each year, click the top radio button, select the month from the list of months, and select the day from the list of days.

   2. To set the exception to occur on a specified date once ever, click the middle radio button, select a month from the list of months, select a day from the list of days, and type a year in the final field.

   3. To set the exception to happen at a regularly occurring interval, click the bottom radio button, select the interval time from the list in the first field, select the day of the week from the list in the middle field, and select the month from the list in the last field.

6. Click **Create**.

   The Holiday and Exception Details page appears, and you receive a confirmation message stating that your exception was successfully created.

7. From the list in the View/Edit Calendar field, select **Edit Holiday Callable Regions**.

   The Holiday and Exception Details page refreshes to allow you to click an exception region.

   > **Note:** To get to the Exception Region Details page, you can click any of the region times; however, by clicking that time you automatically populate start time fields in the Exception Region Details page.

8. From the Region Type list on the Exception Region Details page, select **Callable** if you want to change the designated time period to callable hours, or select **Not callable** if you want change the designated time period to non-callable hours.

9. In the Start Time Hour and Minute fields, if the start time has not automatically defaulted to the time you want to begin calling, select the hour and minute from the respective lists.

   > **Note:** All times in the Hour field are displayed in 24 hour format (0:00 - 24:00). The Minute field allows you to select between **00** (on the hour) and **30** (on the half-hour) time increments.

10. In the End Time Hour and Minute fields, select the hour and minute from the respective lists.

11. Click **Apply**.

    The Holiday and Exception Details page refreshes to display a confirmation message stating that your exception was successfully created.

    To assign the exception to a calendar, refer to the Assigning Holidays and , page 6-98Exceptions to Calendars topic.

Related Topics:

- Viewing and Sorting Items, page 6-86

- Creating Country Calendars, page 6-87

- Modifying Country Calendars, page 6-90

- Using the Calendar Inheritance Feature, page 6-92

- Uninheriting Calendars, page 6-94

- Assigning Holidays and Exceptions to Calendars, page 6-98

- Unassigning Holidays and Exceptions From Calendars, page 6-100

- Removing Holidays and Exceptions, page 6-101

Assigning Holidays and Exceptions to Calendars:

Use the steps below to assign holidays and exceptions to calendars in Oracle Advanced Outbound Telephony.

Prerequisite

To assign holidays and exceptions to calendars, your user account must be assigned the Oracle Advanced Outbound Telephony Administrator responsibility. The holiday or exception you want to assign to a calendar must have already been created. For more information on creating holidays and exceptions, refer to the Creating Holidays and Exceptions, page 6-95 topic.

Login

HTML Login URL

Responsibility

Oracle Advanced Outbound Telephony Administrator

Steps

1. Click the **Calling Calendars** tab.

2. Click the subtab for the appropriate calendar type.

   Your options are:

   - Country Calendar

   - Region Calendar

   - User Defined Calendar

3. In the Calendar Name column, click the hyperlinked calendar name for the calendar to which you want to assign a holiday or exception.

Note: If the calendar to which you want to assign a holiday or exception is the child of another calendar, click the plus sign (+) for the appropriate parent calendar. This expands the parent calendar to show all of its child calendars.

Note: Now you can click the hyperlinked name of the child calendar.

The Calendar Details page appears for the selected calendar type.

4. From the side panel, click **Exception List**.

   The Holidays and Exceptions page appears, displaying a summary view table of any holidays and exceptions already assigned to the selected calendar.

5. Click **Assign Exception**.

   The Assign Exceptions to a Calendar page appears, displaying a summary view table of all existing holidays and exceptions.

6. In the Assign column, click the box for the exception you want to assign to the calendar.

7. Click **Update**.

   The Holidays and Exceptions page appears, displaying the newly assigned exception in the summary view table.

Related Topics:

- Viewing and Sorting Items, page 6-86

- Creating Country Calendars, page 6-87

- Modifying Country Calendars, page 6-90

- Using the Calendar Inheritance Feature, page 6-92

- Uninheriting Calendars, page 6-94

- Creating Holidays and Exceptions, page 6-95

- Unassigning Holidays and Exceptions From Calendars, page 6-100

- Removing Holidays and Exceptions, page 6-101

Unassigning Holidays and Exceptions From Calendars:

Use the steps below to unassign holidays or exceptions from calendars in Oracle Advanced Outbound Telephony.

Prerequisite

To unassign holidays and exceptions from calendars, your user account must be assigned the Oracle Advanced Outbound Telephony Administrator responsibility. The holiday or exception must have already been assigned to a calendar. For more information on assigning holidays and exceptions to calendars, refer to the Assigning Holidays and Exceptions to Calendars, page 6-98 topic.

Login

HTML Login URL

Responsibility

Oracle Advanced Outbound Telephony Administrator

Steps

1. Click the **Calling Calendars** tab.

2. Click the subtab for the appropriate calendar type.

   Your options are:

   - Country Calendar

   - Region Calendar

   - User Defined Calendar

3. In the Calendar Name column, click the hyperlinked calendar name for the calendar from which you want to unassign a holiday or exception.

   > **Note:** If the calendar from which you want to unassign a holiday or exception is the child of another calendar, click the plus sign (+) for the appropriate parent calendar. This expands the parent calendar to show all of its child calendars.

   > **Note:** Now you can click the hyperlinked name of the child calendar.

The Calendar Details page appears for the selected calendar type.

4. From the side panel, click **Exception List**.

   The Holidays and Exceptions page appears, displaying a summary view table of any holidays and exceptions already assigned to the selected calendar.

5. In the Remove column, click the box for the exception you want to unassign from the calendar.

6. Click **Update**.

   The selected exception is unassigned from the calendar.

Related Topics:

- Viewing and Sorting Items, page 6-86

- Creating Country Calendars, page 6-87

- Modifying Country Calendars, page 6-90

- Using the Calendar Inheritance Feature, page 6-92

- Uninheriting Calendars, page 6-94

- Creating Holidays and Exceptions, page 6-95

- Assigning Holidays and Exceptions to Calendars, page 6-98

- Removing Holidays and Exceptions, page 6-101

Removing Holidays and Exceptions:

Use the steps below to remove holidays or exceptions in Oracle Advanced Outbound Telephony.

Prerequisite

To remove holidays or exceptions, your user account must be assigned the Oracle Advanced Outbound Telephony Administrator responsibility. A holiday or exception must already exist. The holiday or exception you want to remove must not be assigned to any calendars.

Login

HTML Login URL

Responsibility

Oracle Advanced Outbound Telephony Administrator

Steps

1. Click the **Calling Calendars** tab.

2. Click the **Holidays and Exceptions** subtab.

   The Holidays and Exceptions page appears, displaying a summary view table of all existing holidays and exceptions.

3. In the Remove column, click the box of the holiday or exception you want to remove.

4. Click **Update**.

   The selected holiday or exception is removed.

Related Topics:

- Viewing and Sorting Items, page 6-86

- Creating Country Calendars, page 6-87

- Modifying Country Calendars, page 6-90

- Using the Calendar Inheritance Feature, page 6-92

- Uninheriting Calendars, page 6-94

- Creating Holidays and Exceptions, page 6-95

- Assigning Holidays and Exceptions to Calendars, page 6-98

- Unassigning Holidays and Exceptions From Calendars, page 6-100

Region Calendars

Use the Region Calendars page to create, modify, or remove region calendars in Oracle Advanced Outbound Telephony. You can also create holidays and exceptions for these region calendars.

Tasks

You can perform the following tasks:

- Viewing and Sorting Items, page 6-103

- Creating Region Calendars, page 6-105

- Modifying Region Calendars, page 6-107

- Removing Region Calendars, page 6-110

- Using the Calendar Inheritance Feature, page 6-111

- Uninheriting Calendars, page 6-113

- Creating Holidays and Exceptions, page 6-114

- Assigning Holidays and Exceptions to Calendars, page 6-117

- Unassigning Holidays and Exceptions From Calendars, page 6-119

- Removing Holidays and Exceptions, page 6-120

Viewing and Sorting Items:

There are six tabs in the Oracle Advanced Outbound Telephony HTML Administration console, including: Campaigns, Algorithms, Calling Calendars, Telephony, Performance, and Administration. Many of these pages contain subtab menus.

Use the steps below to view or sort the contents of a selected page in the Oracle Advanced Outbound Telephony HTML Administration console.

Prerequisite

To access the Oracle Advanced Outbound Telephony HTML Administration console, your user account must be assigned the Oracle Advanced Outbound Telephony Administrator responsibility.

Login

HTML Login URL

Responsibility

Oracle Advanced Outbound Telephony Administrator

Steps

1. From the Oracle Advanced Outbound Telephony HTML Administration console, click the tab you want to view.

   The selected page appears, displaying a summary view table of its contents.

2. Click the subtab menu item you want to view (if other than the default).

   The selected subtab menu item's page appears, displaying a summary view table of its contents.

   > **Note:** The Oracle Advanced Outbound Telephony HTML Administration console always defaults to the first subtab's contents.

3. If there are more items than can fit in the page, click **First**, **Previous**, **Next**, or **Last** to continue viewing the items.

4. Click the column header by which you want to sort the contents of the summary view table.

   > **Note:** You can sort the summary view table items in either ascending or descending order by clicking any of the underlined column headers.

   A blue sort arrow appears to the right of the column heading. This arrow indicates whether you are sorting in ascending or descending order.

5. Click the arrow to reverse the sort order.

Related Topics:

- Creating Region Calendars, page 6-105

- Modifying Region Calendars, page 6-107

- Removing Region Calendars, page 6-110

- Using the Calendar Inheritance Feature, page 6-111

- Uninheriting Calendars, page 6-113

- Creating Holidays and Exceptions, page 6-114

- Assigning Holidays and Exceptions to Calendars, page 6-117

- Unassigning Holidays and Exceptions From Calendars, page 6-119

- Removing Holidays and Exceptions, page 6-120

Creating Region Calendars:

Use the steps below to create region calendars in Oracle Advanced Outbound Telephony.

Prerequisite

The regions you want to create in Oracle Advanced Outbound Telephony must already have been defined in Oracle Marketing. You must use the area code mapping feature in the Oracle Advanced Outbound Telephony HTML Administration Console's Administration tab (Oracle Advanced Outbound Telephony Administrator responsibility) to map these regions to territory code/area code pairs.

Login

HTML Login URL

Responsibility

Oracle Advanced Outbound Telephony Administrator

Steps

1. Click the **Calling Calendars** tab.

    The calling calendars page appears, displaying a list of all existing country calendars. The Country Calendars page is the default view for the Calling Calendars tab.

2. Click the **Region Calendars** subtab.

    The Region Calendars page appears, displaying a list of all existing region calendars.

3. On the Region Calendars page, click **Create Calendar**.

    The Create Region Calendar page appears.

4. In the Calendar Name field, type a name for the new region calendar.

5. From the Region Name list, select the appropriate region.

6. You can create a region calendar by two different methods: you can copy an existing region calendar, or you can create a completely new region calendar.

1. To create a region calendar by using an existing region calendar as a model, click **Copy Region Calendar** and select the region calendar you want to use from the provided list.

2. To create a completely new region calendar, click **Create New Calendar**.

7. Click **Create**.

   The Region Calendar Details page appears, displaying a calendar table with days of the week columns and hours of the day rows.

8. From the View/Edit Calendar list, select **Edit Calendar Callable Regions**.

9. From the calendar table, click the appropriate region corresponding to the time and day you want to start calling (example - Monday at 9:00).

   The Calendar Region Details page appears.

   > **Note:** To open to the Calendar Region Details page, you can click anywhere in the calendar; however, by clicking the day and time you want to begin calling, you automatically populate the week day and start time fields in the Calendar Region Details page.

10. From the list in the Region Type field, select **Callable** if you want to add callable hours, or select **Not callable** if you want to override a callable region.

11. In the Start Time Hour and Minute fields, if the start time has not automatically defaulted to the time you want the region calendar to begin taking effect, select the hour and minute from the respective lists.

    > **Note:** All times in the Hour field are displayed in 24 hour format (0:00 - 24:00). The Minute field allows you to select between **00** (on the hour) and **30** (on the half-hour) time increments.

12. In the End Time Hour and Minute fields, select the hour and minute from the respective lists. The end time is the time at which your region calendar will terminate and the default callable hours on the country calendar will resume.

13. In the Copy To area, select the days of the week to which you wish to copy this calling schedule (if any).

    > **Note:** Copying the calling schedule in this way is not required; however, if your calling schedule will not vary greatly between days of the week, this method provides a quick means to populate a baseline calling calendar. You can always go back to the

individual days and modify the specific calling times.

14. Click **Apply**.

    The region calendar is created and you return to the Region Calendar Details page.

15. In the Override Country Calendar field, select **Yes**, or **No** from the list.

    > **Note:** You must select **Yes** to execute the region calendar. If you
    > select **No**, the region calendar will still be created, but it will not
    > alter or expand upon the calling hours of the existing country
    > calendar.

16. Click **Update**.

    If you selected **Yes**, the Update Region Calendar Confirmation page appears,
    displaying a warning that overriding the country calendar will cause all users of
    this calendar to ignore any country specific restrictions, and you must click **Apply**
    to complete the override. If you selected **No**, The Region Calendar Details page
    refreshes with the selected calling schedule.

Related Topics:

Modifying Region Calendars:

Use the steps below to modify region calendars in Oracle Advanced Outbound
Telephony.

Prerequisite

To modify region calendars in Oracle Advanced Outbound Telephony, your user account must be assigned the Oracle Advanced Outbound Telephony Administrator responsibility. The region calendar you want to modify must already exist.

Login

HTML Login URL

Responsibility

Oracle Advanced Outbound Telephony Administrator

Steps

1. Click the **Calling Calendars** tab.

   The calling calendars page appears, displaying a list of all existing country calendars. The Country Calendars page is the default view for the Calling Calendars tab.

2. Click the **Region Calendars** subtab.

   The Region Calendars page appears, displaying a list of all existing region calendars.

3. In the Calendar Name column, click the calendar name of the region calendar you want to modify.

   The Region Calendar Details page appears, displaying a calendar table with days of the week columns and hours of the day rows.

4. From the View/Edit Calendar list, select **Edit Calendar Callable Regions**.

5. From the table, click the calendar region corresponding to the time and day you want to start calling (example - Monday at 9:00).

   The Calendar Region Details page appears.

   > **Note:** To get to the Calendar Region Details page, you can click anywhere in the calendar; however, by clicking the day and time you want to begin calling, you automatically populate the week day and start time fields in the Calendar Region Details page.

6. From the list in the Region Type field, select **Callable** if you want to add callable hours, or select **Not callable** if you want to override a callable region.

7. In the Start Time Hour and Minute fields, if the start time has not automatically defaulted to the time you want the region calendar to begin taking effect, select the hour and minute from the respective lists.

    Note: All times in the Hour field are displayed in 24 hour format (0:00 - 24:00). The Minute field allows you to select between **00** (on the hour) and **30** (on the half-hour) time increments.

8. In the End Time Hour and Minute fields, select the hour and minute from the respective lists. The end time is the time at which your region calendar will terminate and the default callable hours on the country calendar will resume.

9. In the Copy To area, select the days of the week to which you wish to copy this calling schedule (if any).

    Note: Copying the calling schedule in this way is not required; however, if your calling schedule will not vary greatly between days of the week, this method provides a quick means to populate a baseline calling calendar. You can always go back to the individual days and modify the specific calling times.

10. Click **Apply**.

    The region calendar is created and you return to the Region Calendar Details page.

11. In the Override Country Calendar field, select **Yes**, or **No** from the list.

    Note: You must select **Yes** to execute the region calendar. If you select **No**, the region calendar will still be created, but it will not alter or expand upon the calling hours of the existing country calendar.

12. Click **Update**.

    If you selected **Yes**, the Update Region Calendar Confirmation page appears, displaying a warning that overriding the country calendar will cause all users of this calendar to ignore any country specific restrictions, and you must click **Apply** to complete the override. If you selected **No**, The Region Calendar Details page refreshes with the selected calling schedule.

Related Topics:

- Viewing and Sorting Items, page 6-103

- Creating Region Calendars, page 6-105

- Removing Region Calendars, page 6-110

- Using the Calendar Inheritance Feature, page 6-111

- Uninheriting Calendars, page 6-113

- Creating Holidays and Exceptions, page 6-114

- Assigning Holidays and Exceptions to Calendars, page 6-117

- Unassigning Holidays and Exceptions From Calendars, page 6-119

- Removing Holidays and Exceptions, page 6-120

Removing Region Calendars:

Use the steps below to remove region calendars in Oracle Advanced Outbound Telephony.

Prerequisite

To remove region calendars in Oracle Advanced Outbound Telephony, your user account must be assigned the Oracle Advanced Outbound Telephony Administrator responsibility. The region calendar you want to remove must already exist.

Login

HTML Login URL

Responsibility

Oracle Advanced Outbound Telephony Administrator

Steps

1. Click the **Calling Calendars** tab.

   The calling calendars page appears, displaying a list of all existing country calendars. The Country Calendars page is the default view for the calling calendars page.

2. Click the **Region Calendars** subtab.

   The Region Calendars page appears, displaying a list of all existing region calendars.

3. In the Remove column, click the box for the region calendar you want to remove.

4. Click **Update**.

   The selected region calendar is removed.

Related Topics:

Using the Calendar Inheritance Feature:

The inheritance of calendars allows the definition of one calendar to be used as part of a definition for another calendar.

Instead of using a base template calendar, you can copy any existing calendar and use it as a basis to build another calendar. Changing the "base template" calendar is cumbersome because you must identify and make modifications to all calendars that have previously used the "base template" calendar. The inheritance feature will allow a change to a parent calendar to propagate across all calendars that have elected to inherit the parent calendar definition.

Each calendar that inherits a parent calendars information becomes a child of that parent calendar and is listed under the parent calendar on the main calendar page (for each calendar type). You can view the child calendar(s) of any parent calendar by clicking the plus sign (+) next to the parent calendar's name.

Calendars are created that often reflect legal restrictions for an area. These calendars are used as a basis to build other calendars. If there should be any legislative changes, the inheritance feature will quickly propagate the changes and facilitate compliances toward any legal changes.

Follow the steps below to use the calendar inheritance feature.

Prerequisite

To use the calendar inheritance feature, your user account must be assigned the Oracle Advanced Outbound Telephony Administrator responsibility. A calendar of the same type (country, region, user defined) must already exist, from which you can inherit information.

Login

HTML Login URL

Responsibility

Oracle Advanced Outbound Telephony Administrator

Steps

1. Click the **Calling Calendars** tab.

    The Country Calendars page appears, displaying a list of all existing country calendars. The Country Calendars page is the default view for the Calling Calendars page.

2. Click the subtab for the appropriate calendar type.

    Your options are:

    *   Country Calendar

    *   Region Calendar

    *   User Defined Calendar

3. In the Calendar Name column, click the hyperlinked calendar name for the calendar TO WHICH you want to inherit information.

    The Calendar Details page appears for the appropriate calendar type.

4. From the Inherit From list, select the calendar FROM WHICH you want to inherit information.

5. Click **Inherit**.

    The information from the "inherit from" or parent calendar is propagated to the selected or child calendar.

Related Topics:

Uninheriting Calendars:

Oracle Advanced Outbound Telephony allows you to uninherit a calendar without deleting the calendar.

Follow the steps below to uninherit a calendar.

Prerequisite

To use the calendar inheritance feature, your user account must be assigned the Oracle Advanced Outbound Telephony Administrator responsibility. The calendar you want to uninherit must already be inherited to a calendar (the calendar must already be a child of another calendar).

Login

HTML Login URL

Responsibility

Oracle Advanced Outbound Telephony Administrator

Steps

1. Click the **Calling Calendars** tab.

   The Country Calendars page appears, displaying a list of all existing country

calendars. The Country Calendars page is the default view for the Calling Calendars page.

2. Click the subtab for the appropriate calendar type.

   Your options are:

   • Country Calendar

   • Region Calendar

   • User Defined Calendar

3. In the Calendar Name column, click the plus sign (+) for the appropriate parent calendar. This expands the parent calendar to show all of its child calendars.

4. Click the hyperlinked name of the child calendar you want to uninherit.

   The Calendar Details page appears for the selected child calendar.

5. Click **Uninherit**.

   The child calendar is uninherited from the parent calendar. The former child calendar will now appear on its own in the summary view table on the main calendar page for the selected calendar type (Country, Region, or User Defined).

Related Topics:

• Viewing and Sorting Items, page 6-103

• Creating Region Calendars, page 6-105

• Modifying Region Calendars, page 6-107

• Removing Region Calendars, page 6-110

• Using the Calendar Inheritance Feature, page 6-111

• Creating Holidays and Exceptions, page 6-114

• Assigning Holidays and Exceptions to Calendars, page 6-117

• Unassigning Holidays and Exceptions From Calendars, page 6-119

• Removing Holidays and Exceptions, page 6-120

Creating Holidays and Exceptions:

Use the steps below to create holidays or exceptions for use with calling calendars in

Oracle Advanced Outbound Telephony.

Prerequisite

To create holidays or exceptions for use with calling calendars, your user account must be assigned the Oracle Advanced Outbound Telephony Administrator responsibility.

Login

HTML Login URL

Responsibility

Oracle Advanced Outbound Telephony Administrator

Steps

1. Click the **Calling Calendars** tab.

2. Click the **Holidays and Exceptions** subtab.

    The Holidays and Exceptions page appears, displaying a summary view table of all existing holidays and exceptions.

3. Click **Create Exception**.

    The Create Exception page appears.

4. In the Exception Name field, type a name for the holiday or exception you are creating.

5. In the fields provided in the Exception Type area, you can specify when you want the exception to occur. You can set an exception to happen on a given date each year, on a given date once ever, or on a regularly occurring interval (example - first Monday in January).

    1. To set the exception to occur on a specified date each year, click the top radio button, select the month from the list of months, and select the day from the list of days.

    2. To set the exception to occur on a specified date once ever, click the middle radio button, select a month from the list of months, select a day from the list of days, and type a year in the final field.

    3. To set the exception to happen at a regularly occurring interval, click the bottom radio button, select the interval time from the list in the first field, select the day of the week from the list in the middle field, and select the month from

the list in the last field.

6. Click **Create**.

   The Holiday and Exception Details page appears, and you receive a confirmation message stating that your exception was successfully created.

7. From the list in the View/Edit Calendar field, select **Edit Holiday Callable Regions**.

   The Holiday and Exception Details page refreshes to allow you to click an exception region.

   > **Note:** To get to the Exception Region Details page, you can click any of the region times; however, by clicking that time you automatically populate start time fields in the Exception Region Details page.

8. From the Region Type list on the Exception Region Details page, select **Callable** if you want to change the designated time period to callable hours, or select **Not callable** if you want change the designated time period to non-callable hours.

9. In the Start Time Hour and Minute fields, if the start time has not automatically defaulted to the time you want to begin calling, select the hour and minute from the respective lists.

   > **Note:** All times in the Hour field are displayed in 24 hour format (0:00 - 24:00). The Minute field allows you to select between **00** (on the hour) and **30** (on the half-hour) time increments.

10. In the End Time Hour and Minute fields, select the hour and minute from the respective lists.

11. Click **Apply**.

    The Holiday and Exception Details page refreshes to display a confirmation message stating that your exception was successfully created.

    To assign the exception to a calendar, refer to the Assigning Holidays and , page 6-117Exceptions to Calendars topic.

Related Topics:

- Viewing and Sorting Items, page 6-103

- Creating Region Calendars, page 6-105

- Modifying Region Calendars, page 6-107

- Removing Region Calendars, page 6-110

- Using the Calendar Inheritance Feature, page 6-111

- Uninheriting Calendars, page 6-113

- Assigning Holidays and Exceptions to Calendars, page 6-117

- Unassigning Holidays and Exceptions From Calendars, page 6-119

- Removing Holidays and Exceptions, page 6-120

Assigning Holidays and Exceptions to Calendars:

Use the steps below to assign holidays and exceptions to calendars in Oracle Advanced Outbound Telephony.

Prerequisite

To assign holidays and exceptions to calendars, your user account must be assigned the Oracle Advanced Outbound Telephony Administrator responsibility. The holiday or exception you want to assign to a calendar must have already been created. For more information on creating holidays and exceptions, refer to the Creating Holidays and Exceptions, page 6-114 topic.

Login

HTML Login URL

Responsibility

Oracle Advanced Outbound Telephony Administrator

Steps

1. Click the **Calling Calendars** tab.

2. Click the subtab for the appropriate calendar type.

   Your options are:

   - Country Calendar

   - Region Calendar

- User Defined Calendar

3. In the Calendar Name column, click the hyperlinked calendar name for the calendar to which you want to assign a holiday or exception.

> **Note:** If the calendar to which you want to assign a holiday or exception is the child of another calendar, click the plus sign (+) for the appropriate parent calendar. This expands the parent calendar to show all of its child calendars.

> **Note:** Now you can click the hyperlinked name of the child calendar.

The Calendar Details page appears for the selected calendar type.

4. From the side panel, click **Exception List**.

The Holidays and Exceptions page appears, displaying a summary view table of any holidays and exceptions already assigned to the selected calendar.

5. Click **Assign Exception**.

The Assign Exceptions to a Calendar page appears, displaying a summary view table of all existing holidays and exceptions.

6. In the Assign column, click the box for the exception you want to assign to the calendar.

7. Click **Update**.

The Holidays and Exceptions page appears, displaying the newly assigned exception in the summary view table.

Related Topics:

Unassigning Holidays and Exceptions From Calendars:

Use the steps below to unassign holidays or exceptions from calendars in Oracle Advanced Outbound Telephony.

Prerequisite

To unassign holidays and exceptions from calendars, your user account must be assigned the Oracle Advanced Outbound Telephony Administrator responsibility. The holiday or exception must have already been assigned to a calendar. For more information on assigning holidays and exceptions to calendars, refer to the Assigning Holidays and Exceptions to Calendars, page 6-117 topic.

Login

HTML Login URL

Responsibility

Oracle Advanced Outbound Telephony Administrator

Steps

1. Click the **Calling Calendars** tab.

2. Click the subtab for the appropriate calendar type.

   Your options are:

   - Country Calendar

   - Region Calendar

   - User Defined Calendar

3. In the Calendar Name column, click the hyperlinked calendar name for the calendar from which you want to unassign a holiday or exception.

   > **Note:** If the calendar from which you want to unassign a holiday or exception is the child of another calendar, click the plus sign (+) for

the appropriate parent calendar. This expands the parent calendar to show all of its child calendars.

> **Note:** Now you can click the hyperlinked name of the child calendar.

The Calendar Details page appears for the selected calendar type.

4. From the side panel, click **Exception List**.

   The Holidays and Exceptions page appears, displaying a summary view table of any holidays and exceptions already assigned to the selected calendar.

5. In the Remove column, click the box for the exception you want to unassign from the calendar.

6. Click **Update**.

Related Topics:

- Viewing and Sorting Items, page 6-103

- Creating Region Calendars, page 6-105

- Modifying Region Calendars, page 6-107

- Removing Region Calendars, page 6-110

- Using the Calendar Inheritance Feature, page 6-111

- Uninheriting Calendars, page 6-113

- Creating Holidays and Exceptions, page 6-114

- Assigning Holidays and Exceptions to Calendars, page 6-117

- Removing Holidays and Exceptions, page 6-120

Removing Holidays and Exceptions:

Use the steps below to remove holidays or exceptions in Oracle Advanced Outbound Telephony.

Prerequisite

To remove holidays or exceptions, your user account must be assigned the Oracle

Advanced Outbound Telephony Administrator responsibility. A holiday or exception must already exist. The holiday or exception you want to remove must not be assigned to any calendars.

Login

HTML Login URL

Responsibility

Oracle Advanced Outbound Telephony Administrator

Steps

1. Click the **Calling Calendars** tab.

2. Click the **Holidays and Exceptions** subtab.

   The Holidays and Exceptions page appears, displaying a summary view table of all existing holidays and exceptions.

3. In the Remove column, click the box of the holiday or exception you want to remove.

4. Click **Update**.

   The selected holiday or exception is removed.

Related Topics:

User Defined Calendars

Use the User Defined Calendars page to create, modify, or remove user defined calendars in Oracle Advanced Outbound Telephony. You can also create holidays and exceptions for these user defined calendars.

Tasks

You can perform the following tasks:

- Viewing and Sorting Items, page 6-122

- Creating User Defined Calendars, page 6-124

- Modifying User Defined Calendars, page 6-127

- Removing User Defined Calendars, page 6-129

- Using the Calendar Inheritance Feature, page 6-131

- Uninheriting Calendars, page 6-133

- Creating Holidays and Exceptions, page 6-134

- Assigning Holidays and Exceptions to Calendars, page 6-136

- Unassigning Holidays and Exceptions From Calendars, page 6-138

- Removing Holidays and Exceptions, page 6-140

Viewing and Sorting Items:

There are six tabs in the Oracle Advanced Outbound Telephony HTML Administration console, including: Campaigns, Algorithms, Calling Calendars, Telephony, Performance, and Administration. Many of these pages contain subtab menus.

Use the steps below to view or sort the contents of a selected page in the Oracle Advanced Outbound Telephony HTML Administration console.

Prerequisite

To access the Oracle Advanced Outbound Telephony HTML Administration console, your user account must be assigned the Oracle Advanced Outbound Telephony Administrator responsibility.

Login

HTML Login URL

Responsibility

Oracle Advanced Outbound Telephony Administrator

Steps

1. From the Oracle Advanced Outbound Telephony HTML Administration console, click the tab you want to view.

   The selected page appears, displaying a summary view table of its contents.

2. Click the subtab menu item you want to view (if other than the default).

   The selected subtab menu item's page appears, displaying a summary view table of its contents.

   > **Note:** The Oracle Advanced Outbound Telephony HTML Administration console always defaults to the first subtab's contents.

3. If there are more items than can fit in the page, click **First**, **Previous**, **Next**, or **Last** to continue viewing the items.

4. Click the column header by which you want to sort the contents of the summary view table.

   > **Note:** You can sort the summary view table items in either ascending or descending order by clicking any of the underlined column headers.

   A blue sort arrow appears to the right of the column heading. This arrow indicates whether you are sorting in ascending or descending order.

5. Click the arrow to reverse the sort order.

Related Topics:

- Creating User Defined Calendars, page 6-124

- Modifying User Defined Calendars, page 6-127

- Removing User Defined Calendars, page 6-129

- Using the Calendar Inheritance Feature, page 6-131

- Uninheriting Calendars, page 6-133

- Creating Holidays and Exceptions, page 6-134

- Assigning Holidays and Exceptions to Calendars, page 6-136

- Unassigning Holidays and Exceptions From Calendars, page 6-138

- Removing Holidays and Exceptions, page 6-140

Creating User Defined Calendars:

Use the steps below to create user defined calendars in Oracle Advanced Outbound Telephony.

Prerequisite

To create user defined calendars, your user account must be assigned the Oracle Advanced Outbound Telephony Administrator responsibility.

Login

HTML Login URL

Responsibility

Oracle Advanced Outbound Telephony Administrator

Steps

1. Click the **Calling Calendars** tab.

   The Country Calendars page appears, displaying a list of any existing country calendars. The Country Calendars page is the default view for the calling calendars tab.

2. Click the **User Defined Calendars** subtab.

   The User Defined Calendars page appears, displaying a list of all existing user defined calendars.

3. On the User Defined Calendars page, click **Create Calendar**.

   The Create User Defined Calendar page appears.

4. On the Create User Defined Calendar page, type a name for the new user defined calendar.

5. You can create a user defined calendar by three different methods: you can copy and existing country calendar, you can copy and existing user defined calendar, or you can create a completely new user defined calendar. Select the appropriate option to choose the method by which you will create the user defined calendar.

    1. To create a user defined calendar by using an existing country calendar as a model, select the **Copy Country Calendar** option and select the country you want to use from the list in the field next to the radio button.

    2. To create a user defined calendar by using an existing user defined calendar, select the **Copy User Defined Calendar** option and select which existing user defined calendar you want to use from the list in the field next to the radio button.

    3. To create a completely new user defined calendar, select the **Create New Calendar** option.

6. Click **Create**.

    The User Defined Calendar Details page appears.

7. From the View/Edit Calendar list, select **Edit Calendar Callable Regions**.

8. From the calendar, click the calendar region corresponding to the time you want the calendar to begin calling on the day you want to start calling (example - Monday at 9:00).

    The Calendar Region Details page appears.

    > **Note:** To open to the Calendar Region Details page, you can click anywhere in the calendar; however, by clicking the day and time you want to begin calling, you automatically populate the week day and start time fields in the Calendar Region Details page.

9. From the list in the Region Type field, select **Callable** if you want to add callable hours to the default country calendar, select **Not callable** if you want to override a callable region on the country calendar, or click **Not specified** if you do not want to change the particular callable region on the country calendar.

10. In the Start Time Hour and Minute fields, if the start time has not automatically defaulted to the time you want the user defined calendar to begin taking effect, select the hour and minute from the respective lists.

> **Note:** All times in the Hour field are displayed in 24 hour format (0:00 - 24:00). The Minute field allows you to select between **00** (on the hour) and **30** (on the half-hour) time increments.

11. In the End Time Hour and Minute fields, select the hour and minute from the respective lists. The end time is the time at which your user defined calendar will terminate and the default callable regions on the country calendar will resume.

12. In the Copy To area, select the days of the week to which you wish to copy this calling schedule (if any).

> **Note:** Copying the calling schedule in this way is not required; however, if your calling schedule will not vary greatly between days of the week, this method provides a quick means to populate a baseline calling calendar. You can always go back to the individual days and modify the specific calling times.

13. Click **Apply**.

    The user defined calendar is created and you return to the User Defined Calendar Details page.

14. In the Override Country and Region Calendars field on the User Defined Calendar Details page, select **Yes**, or **No** from the list.

> **Note:** You must select **Yes** to execute the user defined calendar. If you select **No**, the user defined calendar will still be created, but it will not alter or expand upon the calling hours of the existing country and region calendars.

15. Click **Update**.

    The Update User Defined Calendar Conformation page appears, warning you that overriding the country calendar will cause all users of this calendar to ignore any country specific restrictions.

16. Click **Apply** to override the country calendar with the user defined calendar.

    The user defined calendar is created and you return to the User Defined Calendar Details page.

Related Topics:

- Viewing and Sorting Items, page 6-122

Modifying User Defined Calendars:

Use the steps below to modify user defined calendars in Oracle Advanced Outbound Telephony.

Prerequisite

To modify user defined calendars, your user account must be assigned the Oracle Advanced Outbound Telephony Administrator responsibility.

Login

HTML Login URL

Responsibility

Oracle Advanced Outbound Telephony Administrator

Steps

1. Click the **Calling Calendars** tab.

   The Country Calendars page appears, displaying a list of any existing country calendars. The Country Calendars page is the default view for the calling calendars tab.

2. Click the **User Defined Calendars** subtab.

   The User Defined Calendars page appears, displaying a list of all existing user defined calendars.

3. From the list of user defined calendars, click the calendar name for the user defined

calendar you want to modify.

The User Defined Calendar Details page appears.

4. From the View/Edit Calendar list, select **Edit Calendar Callable Regions**.

5. From the calendar, click the calendar region corresponding to the time you want the calendar to begin calling on the day you want to start calling (example - Monday at 9:00).

The Calendar Region Details page appears.

> **Note:** To get to the Calendar Region Details page, you can click anywhere in the calendar; however, by clicking the day and time you want to begin calling, you automatically populate the week day and start time fields in the Calendar Region Details page.

6. From the list in the Region Type field, select **Callable** if you want to add callable hours to the default country calendar, select **Not callable** if you want to override a callable region on the country calendar, or click **Not specified** if you do not want to change the particular callable region on the country calendar.

7. In the Start Time Hour and Minute fields, if the start time has not automatically defaulted to the time you want the user defined calendar to begin taking effect, select the hour and minute from the respective lists.

> **Note:** All times in the Hour field are displayed in 24 hour format (0:00 - 24:00). The Minute field allows you to select between **00** (on the hour) and **30** (on the half-hour) time increments.

8. In the End Time Hour and Minute fields, select the hour and minute from the respective lists. The end time is the time at which your user defined calendar will terminate and the default callable regions on the country calendar will resume.

9. In the Copy To area, select the days of the week to which you wish to copy this calling schedule (if any).

> **Note:** Copying the calling schedule in this way is not required; however, if your calling schedule will not vary greatly between days of the week, this method provides a quick means to populate a baseline calling calendar. You can always go back to the individual days and modify the specific calling times.

10. Click **Apply**.

The country calendar is created and you return to the Country Calendar Details page.

11. In the Override Country and Region Calendars on the User Defined Calendar Details page, select **Yes**, or **No** from the list.

> **Note:** You must select **Yes** to execute the user defined calendar. If you select **No**, the user defined calendar will still be created, but it will not alter or expand upon the calling hours of the existing country and region calendars.

12. Click **Update**.

The Update User Defined Calendar Conformation page appears, warning you that overriding the country calendar will cause all users of this calendar to ignore any country specific restrictions.

13. Click **Apply** to override the country calendar with the user defined calendar.

The user defined calendar is created and you return to the User Defined Calendar Details page. A confirmation note will appear at the top of the page, letting you know the modification was successful.

Related Topics:

- Viewing and Sorting Items, page 6-122

- Creating User Defined Calendars, page 6-124

- Removing User Defined Calendars, page 6-129

- Using the Calendar Inheritance Feature, page 6-131

- Uninheriting Calendars, page 6-133

- Creating Holidays and Exceptions, page 6-134

- Assigning Holidays and Exceptions to Calendars, page 6-136

- Unassigning Holidays and Exceptions From Calendars, page 6-138

- Removing Holidays and Exceptions, page 6-140

Removing User Defined Calendars:

Use the steps below to remove user defined calendars in Oracle Advanced Outbound Telephony.

Prerequisite

To remove user defined calendars, your user account must be assigned the Oracle Advanced Outbound Telephony Administrator responsibility.

Login

HTML Login URL

Responsibility

Oracle Advanced Outbound Telephony Administrator

Steps

1. Click the **Calling Calendars** tab.

   The Country Calendars page appears, displaying a list of any existing country calendars. The Country Calendars page is the default view for the calling calendars tab.

2. On the Country Calendars page, click the **User Defined Calendars** subtab.

   The User Defined Calendars page appears, displaying a list of all existing user defined calendars.

3. In the Remove column, click the box for the user defined calendar you want to remove.

4. Click **Update**.

   The selected user defined calendar is removed.

Related Topics:

- Viewing and Sorting Items, page 6-122

- Creating User Defined Calendars, page 6-124

- Modifying User Defined Calendars, page 6-127

- Using the Calendar Inheritance Feature, page 6-131

- Uninheriting Calendars, page 6-133

- Creating Holidays and Exceptions, page 6-134

- Assigning Holidays and Exceptions to Calendars, page 6-136

- Unassigning Holidays and Exceptions From Calendars, page 6-138

- Removing Holidays and Exceptions, page 6-140

Using the Calendar Inheritance Feature:

The inheritance of calendars allows the definition of one calendar to be used as part of a definition for another calendar.

Instead of using a base template calendar, you can copy any existing calendar and use it as a basis to build another calendar. Changing the "base template" calendar is cumbersome because you must identify and make modifications to all calendars that have previously used the "base template" calendar. The inheritance feature will allow a change to a parent calendar to propagate across all calendars that have elected to inherit the parent calendar definition.

Each calendar that inherits a parent calendars information becomes a child of that parent calendar and is listed under the parent calendar on the main calendar page (for each calendar type). You can view the child calendar(s) of any parent calendar by clicking the plus sign (+) next to the parent calendar's name.

Calendars are created that often reflect legal restrictions for an area. These calendars are used as a basis to build other calendars. If there should be any legislative changes, the inheritance feature will quickly propagate the changes and facilitate compliances toward any legal changes.

Follow the steps below to use the calendar inheritance feature.

Prerequisite

To use the calendar inheritance feature, your user account must be assigned the Oracle Advanced Outbound Telephony Administrator responsibility. A calendar of the same type (country, region, user defined) must already exist, from which you can inherit information.

Login

HTML Login URL

Responsibility

Oracle Advanced Outbound Telephony Administrator

Steps

1. Click the **Calling Calendars** tab.

The Country Calendars page appears, displaying a list of all existing country calendars. The Country Calendars page is the default view for the Calling Calendars page.

2. Click the subtab for the appropriate calendar type.

    Your options are:

    *   Country Calendar

    *   Region Calendar

    *   User Defined Calendar

3. In the Calendar Name column, click the hyperlinked calendar name for the calendar TO WHICH you want to inherit information.

    The Calendar Details page appears for the appropriate calendar type.

4. From the Inherit From list, select the calendar FROM WHICH you want to inherit information.

5. Click **Inherit**.

    The information from the "inherit from" or parent calendar is propagated to the selected or child calendar.

Related Topics:

Uninheriting Calendars:

Oracle Advanced Outbound Telephony allows you to uninherit a calendar without deleting the calendar.

Follow the steps below to uninherit a calendar.

Prerequisite

To use the calendar inheritance feature, your user account must be assigned the Oracle Advanced Outbound Telephony Administrator responsibility. The calendar you want to uninherit must already be inherited to a calendar (the calendar must already be a child of another calendar).

Login

HTML Login URL

Responsibility

Oracle Advanced Outbound Telephony Administrator

Steps

1. Click the **Calling Calendars** tab.

   The Country Calendars page appears, displaying a list of all existing country calendars. The Country Calendars page is the default view for the Calling Calendars page.

2. Click the subtab for the appropriate calendar type.

   Your options are:

   - Country Calendar

   - Region Calendar

   - User Defined Calendar

3. In the Calendar Name column, click the plus sign (+) for the appropriate parent calendar. This expands the parent calendar to show all of its child calendars.

4. Click the hyperlinked name of the child calendar you want to uninherit.

   The Calendar Details page appears for the selected child calendar.

5. Click **Uninherit**.

The child calendar is uninherited from the parent calendar. The former child calendar will now appear on its own in the summary view table on the main calendar page for the selected calendar type (Country, Region, or User Defined).

Related Topics:

- Viewing and Sorting Items, page 6-122

- Creating User Defined Calendars, page 6-124

- Modifying User Defined Calendars, page 6-127

- Removing User Defined Calendars, page 6-129

- Using the Calendar Inheritance Feature, page 6-131

- Creating Holidays and Exceptions, page 6-134

- Assigning Holidays and Exceptions to Calendars, page 6-136

- Unassigning Holidays and Exceptions From Calendars, page 6-138

- Removing Holidays and Exceptions, page 6-140

Creating Holidays and Exceptions:

Use the steps below to create holidays or exceptions for use with calling calendars in Oracle Advanced Outbound Telephony.

Prerequisite

To create holidays or exceptions for use with calling calendars, your user account must be assigned the Oracle Advanced Outbound Telephony Administrator responsibility.

Login

HTML Login URL

Responsibility

Oracle Advanced Outbound Telephony Administrator

Steps

1. Click the **Calling Calendars** tab.

2. Click the **Holidays and Exceptions** subtab.

The Holidays and Exceptions page appears, displaying a summary view table of all existing holidays and exceptions.

3. Click **Create Exception**.

The Create Exception page appears.

4. In the Exception Name field, type a name for the holiday or exception you are creating.

5. In the fields provided in the Exception Type area, you can specify when you want the exception to occur. You can set an exception to happen on a given date each year, on a given date once ever, or on a regularly occurring interval (example - first Monday in January).

   1. To set the exception to occur on a specified date each year, click the top radio button, select the month from the list of months, and select the day from the list of days.

   2. To set the exception to occur on a specified date once ever, click the middle radio button, select a month from the list of months, select a day from the list of days, and type a year in the final field.

   3. To set the exception to happen at a regularly occurring interval, click the bottom radio button, select the interval time from the list in the first field, select the day of the week from the list in the middle field, and select the month from the list in the last field.

6. Click **Create**.

The Holiday and Exception Details page appears, and you receive a confirmation message stating that your exception was successfully created.

7. From the list in the View/Edit Calendar field, select **Edit Holiday Callable Regions**.

The Holiday and Exception Details page refreshes to allow you to click an exception region.

> **Note:** To get to the Exception Region Details page, you can click any of the region times; however, by clicking that time you automatically populate start time fields in the Exception Region Details page.

8. From the Region Type list on the Exception Region Details page, select **Callable** if you want to change the designated time period to callable hours, or select **Not callable** if you want change the designated time period to non-callable hours.

9. In the Start Time Hour and Minute fields, if the start time has not automatically defaulted to the time you want to begin calling, select the hour and minute from the respective lists.

> **Note:** All times in the Hour field are displayed in 24 hour format (0:00 - 24:00). The Minute field allows you to select between **00** (on the hour) and **30** (on the half-hour) time increments.

10. In the End Time Hour and Minute fields, select the hour and minute from the respective lists.

11. Click **Apply**.

   The Holiday and Exception Details page refreshes to display a confirmation message stating that your exception was successfully created.

To assign the exception to a calendar, refer to the Assigning Holidays and , page 6-136 Exceptions to Calendars topic.

Related Topics:

Assigning Holidays and Exceptions to Calendars:

Use the steps below to assign holidays and exceptions to calendars in Oracle Advanced Outbound Telephony.

Prerequisite

To assign holidays and exceptions to calendars, your user account must be assigned the

Oracle Advanced Outbound Telephony Administrator responsibility. The holiday or exception you want to assign to a calendar must have already been created. For more information on creating holidays and exceptions, refer to the Creating Holidays and Exceptions, page 6-134 topic.

Login

HTML Login URL

Responsibility

Oracle Advanced Outbound Telephony Administrator

Steps

1. Click the **Calling Calendars** tab.

2. Click the subtab for the appropriate calendar type.

    Your options are:

    - Country Calendar

    - Region Calendar

    - User Defined Calendar

3. In the Calendar Name column, click the hyperlinked calendar name for the calendar to which you want to assign a holiday or exception.

    > **Note:** If the calendar to which you want to assign a holiday or exception is the child of another calendar, click the plus sign (+) for the appropriate parent calendar. This expands the parent calendar to show all of its child calendars.

    > **Note:** Now you can click the hyperlinked name of the child calendar.

    The Calendar Details page appears for the selected calendar type.

4. From the side panel, click **Exception List**.

    The Holidays and Exceptions page appears, displaying a summary view table of any holidays and exceptions already assigned to the selected calendar.

5. Click **Assign Exception**.

The Assign Exceptions to a Calendar page appears, displaying a summary view table of all existing holidays and exceptions.

6. In the Assign column, click the box for the exception you want to assign to the calendar.

7. Click **Update**.

The Holidays and Exceptions page appears, displaying the newly assigned exception in the summary view table.

Related Topics:

Unassigning Holidays and Exceptions From Calendars:

Use the steps below to unassign holidays or exceptions from calendars in Oracle Advanced Outbound Telephony.

Prerequisite

To unassign holidays and exceptions from calendars, your user account must be assigned the Oracle Advanced Outbound Telephony Administrator responsibility. The holiday or exception must have already been assigned to a calendar. For more information on assigning holidays and exceptions to calendars, refer to the Assigning Holidays and Exceptions to Calendars, page 6-136 topic.

Login

HTML Login URL

Responsibility

Oracle Advanced Outbound Telephony Administrator

Steps

1. Click the **Calling Calendars** tab.

2. Click the subtab for the appropriate calendar type.

    Your options are:

    *   Country Calendar

    *   Region Calendar

    *   User Defined Calendar

3. In the Calendar Name column, click the hyperlinked calendar name for the calendar from which you want to unassign a holiday or exception.

    > **Note:** If the calendar from which you want to unassign a holiday or exception is the child of another calendar, click the plus sign (+) for the appropriate parent calendar. This expands the parent calendar to show all of its child calendars.

    > **Note:** Now you can click the hyperlinked name of the child calendar.

    The Calendar Details page appears for the selected calendar type.

4. From the side panel, click **Exception List**.

    The Holidays and Exceptions page appears, displaying a summary view table of any holidays and exceptions already assigned to the selected calendar.

5. In the Remove column, click the box for the exception you want to unassign from the calendar.

6. Click **Update**.

    The selected exception is unassigned from the calendar.

Related Topics:

*   Viewing and Sorting Items, page 6-122

- Creating User Defined Calendars, page 6-124

- Modifying User Defined Calendars, page 6-127

- Removing User Defined Calendars, page 6-129

- Using the Calendar Inheritance Feature, page 6-131

- Uninheriting Calendars, page 6-133

- Creating Holidays and Exceptions, page 6-134

- Assigning Holidays and Exceptions to Calendars, page 6-136

- Removing Holidays and Exceptions, page 6-140

Removing Holidays and Exceptions:

Use the steps below to remove holidays or exceptions in Oracle Advanced Outbound Telephony.

Prerequisite

To remove holidays or exceptions, your user account must be assigned the Oracle Advanced Outbound Telephony Administrator responsibility. A holiday or exception must already exist. The holiday or exception you want to remove must not be assigned to any calendars.

Login

HTML Login URL

Responsibility

Oracle Advanced Outbound Telephony Administrator

Steps

1. Click the **Calling Calendars** tab.

2. Click the **Holidays and Exceptions** subtab.

   The Holidays and Exceptions page appears, displaying a summary view table of all existing holidays and exceptions.

3. In the Remove column, click the box of the holiday or exception you want to remove.

4. Click **Update**.

The selected holiday or exception is removed.

Related Topics:

Performance

Use the Performance page to generate a wide range of reports.

> **Note:** None of the reports on the Performance tab will pull any data unless the Server Properties (subtab on the Administration tab) has been set to correspond correctly with the database time zone. For information on configuring your server properties, refer to the Configuring Server Properties, page 6-171 topic in this guide.

Tasks

- Generating the Campaign Agent Performance Statistics Report, page 6-156

- Generating the Campaign Performance Statistics Report, page 6-160

- Generating the Agent Call Results Detail Report, page 6-164

- Generating the Campaign Time Zone Detail Report, page 6-167

Viewing and Sorting Items:

There are six tabs in the Oracle Advanced Outbound Telephony HTML Administration console, including: Campaign Activities, Algorithms, Calling Calendars, Telephony, Performance, and Administration. Many of these pages contain subtab menus.

Use the steps below to view or sort the contents of a selected page in the Oracle Advanced Outbound Telephony HTML Administration console.

Prerequisite

To access the Oracle Advanced Outbound Telephony HTML Administration console, your user account must be assigned the Oracle Advanced Outbound Telephony Administrator responsibility.

Login

HTML Login URL

Responsibility

Oracle Advanced Outbound Telephony Administrator

Steps

1. From the Oracle Advanced Outbound Telephony HTML Administration console, click the tab you want to view.

   The selected page appears, displaying a summary view table of its contents.

2. Click the subtab menu item you want to view (if other than the default).

   The selected subtab menu item's page appears, displaying a summary view table of its contents.

   > **Note:** The Oracle Advanced Outbound Telephony HTML Administration console always defaults to the first subtab's contents.

3. If there are more items than can fit in the page, click **First**, **Previous**, **Next**, or **Last** to continue viewing the items.

4. Click the column header by which you want to sort the contents of the summary view table.

> **Note:** You can sort the summary view table items in either ascending or descending order by clicking any of the underlined column headers.

A blue sort arrow appears to the right of the column heading. This arrow indicates whether you are sorting in ascending or descending order.

5. Click the arrow to reverse the sort order.

Related Topics:

Generating the Dialing Statistics Report:

Explanation of Report Results

Column Name	Description
Start Time	Time at which the first agent logged in.
Report Request Time	Browser time when report was requested

Column Name	Description
Statistics as of	Time when AO servers last updated data
Total Active Time	Total Agent Active (Non-Idle) time
Total Login Time	Total Agent Login time
Records Loaded	Total number of records in the target group that passed validation.
Records Remaining	Records that are to be called i.e. Records Loaded minus 'Do Not Use' Records
Callable Records	Number of Remaining Records that are callable at this time

General Dialing

Column Name	Description
Total Dials	Total number of dials placed since the start time
Preview Dials	Total number of preview dials placed since the start time
Timed Preview Dials	Total number of timed preview dials placed since the start time
Progressive Dials	Total number of progressive dials placed since the start time
Manual Dials	Total number of manual dials placed since the start time
Utilization	Utilization is a measure of how much time is spent working on calls rather than waiting for a call to arrive. It is calculated as: (total talk time + total wrapup time)/(total wait time + total talk time + total wrapup time)

Column Name	Description
Maximum Agents	Max Agents logged in today/last hour/last 5 minutes

Use the steps below to generate a Dialing Statistics report in Oracle Advanced Outbound Telephony.

Prerequisite

To generate reports, your user account must be assigned the Oracle Advanced Outbound Telephony Administrator responsibility.

Login

HTML Login URL

Responsibility

Oracle Advanced Outbound Telephony Administrator

Steps

1. Click the **Performance** tab.

2. From the side panel, click **Dialing Statistics**.

   The Dialing Statistics page appears.

3. From the Campaign/Activity list, select the campaign or campaign activity for which you want to see dialing statistics.

   The Dialing Statistics page updates to reflect the generated report results.

Related Topics:

Generating the Campaign Call Results Detail Report:

Explanation of Report Results

Column Name	Description
Start time	Time at which the first agent logged in
Report Request Time	Browser time when report was requested
Statistics as of	Time when AO servers last updated data
Total Active Time	Total Agent Active (Non-Idle) time
Total Login Time	Total Agent Login time
Current Agents	Number of Agents Currently logged in
Average Talk Time	Average time spent talking to a customer. Calculated as: total_talk_time/calls_offered
Average Wrapup Time	Average time spent wrapping up a call. Calculated as: total_wrapup_time/calls_offered
Utilization	Utilization is a measure of how much time is spent working on calls rather than waiting for a call to arrive. It is calculated as: (total talk time + total wrapup time)/(total wait time + total talk time + total wrapup time)
Records Loaded	Total number of records in the target group that passed validation.
Records Called Once+	Records that have been called at least once.
Records Removed	Records marked as 'Do Not Use'

Column Name	Description
Records Remaining	Records loaded minus Records Removed
Records Currently Unavailable	Records that cannot currently be called
Records Currently Available	Records that are currently callable
List Penetration	This is a measure of how much of the list we have consumed. It is calculated as: Records Removed/Records Loaded
Predicted Exhaustion	Predicted exhaustion is the time after which we expect to run out of records in this list. Calculating it takes into account the current rate of record consumption and the total available records.
Dials	Total dials placed. Also calculated are values per login hour, and per active hour.
Calls Offered	Total dials serviced by agents. Also calculated are values per login hour, and per active hour.
Contacts	Total live customers who were serviced by agents. Also calculated are values per login hour, and per active hour.
Sales	Total dials that resulted in a Sale. Also calculated are values per login hour, and per active hour.
Positive Responses	Total dials that resulted in a Positive Response. Also calculated are values per login hour, and per active hour.

The table at the bottom of the page displays the outcome/result codes for the calls placed for this Campaign Activity. The table has a row for each unique outcome-result pair. The following describe the data presented on each of these outcome-result pairs.

Column Name	Description
Calls	Total calls placed that had this outcome-result pair.
Outcome-Result % of Calls	Percentage of total calls that had this outcome-result pair.
Contacts	Total live customers who were serviced by agents.
Outcome-Result % of Contacts	Percentage of contacts that had this outcome-result pair.
Positive Responses	Total dials that resulted in a Positive Response.
Outcome-Result % of Positive Responses	Percentage of positive response calls that had this outcome-result pair.
Result % of Outcome	Percentage of total calls with this outcome that had this result.
Outcome-Results per hour	Number of occurrences of this outcome-result pair per hour.

Use the steps below to generate a campaign activity call results detail report in Oracle Advanced Outbound Telephony.

Prerequisite

To generate reports, your user account must be assigned the Oracle Advanced Outbound Telephony Administrator responsibility.

Login

HTML Login URL

Responsibility

Oracle Advanced Outbound Telephony Administrator

Steps

1. Click the **Performance** tab.

2. From the side panel, click **Campaign Call Results Detail**.

   The Campaign Call Results Detail page appears.

3. From the Campaign/Activity list, select the campaign or campaign activity for which you want to see call result details.

   The Campaign Call Results Detail page updates to reflect the generated report results.

Related Topics:

Generating the Campaign Record Detail Statistics Report:

Explanation of Report Results

Column Name	Description
Campaign	The campaign on which the reports will generate dialing statistics.
Separate by Range	This option separates the display into rows for: higher, lower, and within the specified acceptable range.

Column Name	Description
Acceptable Range Quantity	The Acceptable Range Quantity specifies which value (for each row) is compared to the threshold values to determine which bin the row should appear in.
	For example, if you select "Records Currently Available", then the available records count for each campaign/activity is compared to the threshold values, and the campaigns/activities are grouped accordingly.
Acceptable Range Min	The minimum parameter for your range.
Acceptable Range Max	The maximum parameter for your range.
Today's Start time	Time at which the first agent logged in today
Report Request Time	Browser time when report was requested
Statistics as of	Time when AO servers last updated data
Total Active Time	Total Agent Active (Non-Idle) time
Total Login Time	Total Agent Login time
Campaign Activities/Subsets	Campaign Activities and Subsets belonging to this Campaign Activity.
Dialing Mode	Manual, Preview, Timed Preview, or Progressive.
Records Loaded	Total number of records in the target group that passed validation.
Records Called Once+	Records that have been called at least once. Also calculated is the percentage of Records called once+ to Records Loaded.
Records Removed	Records marked as 'Do Not Use'. Also calculated is the percentage of Records Removed to Records Loaded.

Column Name	Description
Records Remaining	Records loaded minus Records Removed. Also calculated is the percentage of Records Remaining to Records Loaded.
Records Currently Unavailable	Records that cannot currently be called. Also calculated is the percentage of Records Unavailable to Records Loaded.
Records Currently Available	Records that are currently callable. Also calculated is the percentage of Records Available to Records Loaded.
List Penetration	This is a measure of how much of the list we have consumed. It is calculated as: Records Removed/Records Loaded.
Predicted Exhaustion	Predicted exhaustion is the time after which we expect to run out of records in this list. Calculating it takes into account the current rate of record consumption and the total available records.
Quota Curr/Obj	This is a measure of how well we are attaining our objective quota. Objective quota is the value set as the desired quota for execution. Current quota is the actual quota value being attained by the AO servers.Quota Curr/Obj is calculated as: runtime quota / objective quota This is blank if the target group has quantum set instead of quota.

Use the steps below to generate a Campaign Record Detail Statistics report in Oracle Advanced Outbound Telephony.

Prerequisite

To generate reports, your user account must be assigned the Oracle Advanced Outbound Telephony Administrator responsibility.

Login

HTML Login URL

Responsibility

Oracle Advanced Outbound Telephony Administrator

Steps

1. Click the **Performance** tab.

2. From the side panel, click **Campaign Record Detail Statistics**.

   The Campaign Record Detail Statistics page appears.

3. From the Campaign list, select the campaign for which you want to see record detail statistics.

   The Campaign Record Detail Statistics page updates to reflect the generated report results.

4. To use the threshold features:

   1. Select the Separate by Range option if you want to separate the report results into rows for higher, lower, and within you range.

   2. From the Acceptable Range Quantity list, select the value you want.

   3. In the Acceptable Range Min field, type the minimum parameter for your report.

   4. In the Acceptable Range Max field, type the maximum parameter for your report.

   5. Click **Show Report**.

Related Topics:

- Viewing and Sorting Items, page 6-142

- Generating the Dialing Statistics Report, page 6-143

- Generating the Campaign Call Results Detail Report, page 6-146

- Generating the Campaign Record Summary Statistics Report, page 6-153

- Generating the Campaign Agent Performance Statistics Report, page 6-156

- Generating the Campaign Performance Statistics Report, page 6-160

Generating the Campaign Record Summary Statistics Report:

Explanation of Report Results

Column Name	Description
Separate by Range	This option separates the display into rows for: higher, lower, and within the specified acceptable range.
Acceptable Range Quantity	The Acceptable Range Quantity specifies which value (for each row) is compared to the threshold values to determine which bin the row should appear in.
	For example, if you select "Records Currently Available", then the available records count for each campaign/activity is compared to the threshold values, and the campaigns/sctivities are grouped accordingly.
Acceptable Range Min	The minimum parameter for your range.
Acceptable Range Max	The maximum parameter for your range.
Report Request Time	Browser time when report was requested.
Statistics as of	Time when the Oracle Advanced Outbound Telephony servers last updated data.
Campaign/Activity	Campaign or Campaign Activity Name.
Dialing Mode	Manual, Preview, Timed Preview, or Progressive.
Records Loaded	Total number of records in the target group that passed validation.

Column Name	Description
Records Called Once+	Records that have been called at least once. Also calculated is the percentage of Records called once+ to Records Loaded.
Records Removed	Records marked as 'Do Not Use'. Also calculated is the percentage of Records Removed to Records Loaded.
Records Remaining	Records loaded minus Records Removed. Also calculated is the percentage of Records Remaining to Records Loaded.
Records Currently Unavailable	Records that cannot currently be called. Also calculated is the percentage of Records Unavailable to Records Loaded.
Records Currently Available	Records that are currently callable. Also calculated is the percentage of Records Available to Records Loaded.
List Penetration	This is a measure of how much of the list we have consumed. It is calculated as: Records Removed/Records Loaded.
Predicted Exhaustion	Predicted exhaustion is the time after which we expect to run out of records in this list. Calculating it takes into account the current rate of record consumption and the total available records.
Quota Curr/Obj	This is a measure of how well we are attaining our objective quota. Objective quota is the value set as the desired quota for execution. Current quota is the actual quota value being attained by the Oracle Advanced Outbound Telephony servers. Quota Curr/Obj is calculated as: runtime quota/objective quota. This is blank if the target group has quantum set instead of quota.

Use the steps below to generate a Campaign Record Summary Statistics report in Oracle Advanced Outbound Telephony.

Prerequisite

To generate reports, your user account must be assigned the Oracle Advanced Outbound Telephony Administrator responsibility.

Login

HTML Login URL

Responsibility

Oracle Advanced Outbound Telephony Administrator

Steps

1. Click the **Performance** tab.

2. From the side panel, click **Campaign Record Summary Statistics**.

   The Campaign Record Summary Statistics page appears, displaying a summary view table of the report statistics for all campaigns scheduled for executed in Oracle Advanced Outbound Telephony.

3. To use the threshold features:

   1. Select the Separate by Range option if you want to separate the report results into rows for higher, lower, and within you range.

   2. From the Acceptable Range Quantity list, select the value you want.

   3. In the Acceptable Range Min field, type the minimum parameter for your report.

   4. In the Acceptable Range Max field, type the maximum parameter for your report.

   5. Click **Show Report**.

Related Topics:

- Viewing and Sorting Items, page 6-142

- Generating the Dialing Statistics Report, page 6-143

- Generating the Campaign Call Results Detail Report, page 6-146

Generating the Campaign Agent Performance Statistics Report:

Explanation of Report Results

Column Name	Description
Campaign/Activity	The campaign or campaign activity on which the reports will generate information.
Separate by Range	This option separates the display into rows for: higher, lower, and within the specified acceptable range.
Acceptable Range Quantity	The Acceptable Range Quantity specifies which value (for each row) is compared to the threshold values to determine which bin the row should appear in.
	For example, if you select "Records Currently Available", then the available records count for each campaign/activity is compared to the threshold values, and the campaigns/activities are grouped accordingly.
Acceptable Range Min	The minimum parameter for your range.
Acceptable Range Max	The maximum parameter for your range.
Today's Start time	Time at which the first agent logged in today.
Report Request Time	Browser time when report was requested.
Statistics as of	Time when AO servers last updated data.

Column Name	Description
Total Active Time	Total Agent Active (Non-Idle) time.
Total Login Time	Total Agent Login time.
Dials	Total dials placed across all agents. Also calculated per agent per hour.
Offered	Total dials serviced by all agents. Also calculated per agent per hour.
Contacts	Total live customers who were serviced by all agents. Also calculated per agent per hour.
Sales	Total dials that resulted in a Sale across all agents. Also calculated per agent per hour.
Pos Resp	Total dials that resulted in a Positive Response across all agents. Also calculated per agent per hour.
Utilization	Utilization is a measure of how much time is spent working on calls rather than waiting for a call to arrive. It is calculated as: (total talk time + total wrapup time)/(total wait time + total talk time + total wrapup time).
Maximum Agents	Max Agents logged into the activity.
Agent Status	Status statistics for all agents assigned to the selected campaign/campaign activity.
Longest / Shortest / Average	Longest/Shortest/Average calculated across all agents working on this campaign or campaign activity. Calculated for Talk Time, Available Time, Wrapup Time, Idle Time.
Agent	Agent Name. Clicking the Agent's name gives you the 'Agent Call Results Detail' report for that agent.
Current Status	Idle, Talk, Wrap up, or Logged out.

Column Name	Description
Time in Current Status	Time in Current Status.
Total Login Time	Time the Agent has been logged in.
Utilization	Total talk time + total wrapup time)/(total wait time + total talk time + total wrapup time) calculated for this agent.
Calls offered	Total dials serviced by this agent. Also calculated per hour.
Contacts	Total live customers who were serviced by this agent. Also calculated per hour.
Sales	Total dials that resulted in a Sale for this agent. Also calculated per hour.
Sales Conv %	Total Sales/Total Contacts for this agent.
Positive Response	Total dials that resulted in a Positive Response for this agent. Also calculated per hour, and as a percentage of total contacts.
Positive Response %	Total Positive Responses/Total Contacts for this agent
Total/Average Idle/Talk/Available/Wrapup time	Total/Average times calculated for this agent

Use the steps below to generate a Campaign Agent Performance Statistics report in Oracle Advanced Outbound Telephony.

Prerequisite

To generate reports, your user account must be assigned the Oracle Advanced Outbound Telephony Administrator responsibility.

Login

HTML Login URL

Responsibility

Oracle Advanced Outbound Telephony Administrator

Steps

1. Click the **Performance** tab.

2. From the side panel, click **CampaignAgent Performance Statistics**.

   The Campaign Agent Performance Statistics page appears.

3. From the Campaign/Activity list, select the campaign or campaign activity for which you want to see agent performance.

   The Agent Performance page updates to reflect the generated report results.

4. To use the threshold features:

   1. From the Campaign/Activity list, select the campaign or campaign activity on which you want to generate report information.

   2. Select the Separate by Range option if you want to separate the report results into rows for higher, lower, and within you range.

   3. From the Acceptable Range Quantity list, select the value you want.

   4. In the Acceptable Range Min field, type the minimum parameter for your report.

   5. In the Acceptable Range Max field, type the maximum parameter for your report.

   6. Click **Show Report**.

Related Topics:

- Generating the Campaign Performance Statistics Report, page 6-160

- Generating the Agent Call Results Detail Report, page 6-164

- Generating the Campaign Time Zone Detail Report, page 6-167

Generating the Campaign Performance Statistics Report:

Explanation of Report Results

Column Name	Description
Separate by Range	This option separates the display into rows for: higher, lower, and within the specified acceptable range.
Acceptable Range Quantity	The Acceptable Range Quantity specifies which value (for each row) is compared to the threshold values to determine which bin the row should appear in.
	For example, if you select "Records Currently Available", then the available records count for each campaign/activity is compared to the threshold values, and the campaigns/activities are grouped accordingly.
Acceptable Range Min	The minimum parameter for your range.
Acceptable Range Max	The maximum parameter for your range.
Report Request Time	Browser time when report was requested.
Statistics as of	Time when AO servers last updated data.
Campaign / Activity	Campaign or Campaign Activity Name.
Dialing Mode	Manual, Preview, Timed Preview, or Progressive.
Total Active Time	Sum of all agents' total active time.
Total Login Time	Sum of all agents' total login time.

Column Name	Description
Current Agents	Number of Agents currently logged in.
Average Utilization	Utilization is a measure of how much time is spent working on calls rather than waiting for a call to arrive. It is calculated as: (total talk time + total wrapup time)/(total wait time + total talk time + total wrapup time). Total times are for all agents.
Dials	Total dials placed. Also calculated per login hour.
Offered	Total dials serviced by agents.
Offered/Agent Hour	Total calls offered/Total login time (across all agents).
Contacts	Total live customers who were serviced by agents. Also calculated per login hour.
Contacts/Agent Hour	Total contacts/Total login time (across all agents).
Sales	Total dials that resulted in a Sale. Also calculated are values per login hour, and per active hour.
Sales/Agent Hour	Total sales/Total login time (across all agents).
Sales Conv %	Total Sales/Total Contacts for all agents on this campaign activity.
Pos Resp	Total dials that resulted in a Positive Response. Also calculated are values per login hour, and per active hour.
Pos Resp/ Agent Hour	Total Positive Responses/Total login time (across all agents).
Pos Resp %	Total Positive Responses/Total Contacts for all agents on this campaign.

Column Name	Description
Average Available/Talk/Wrap up	Average times calculated for all agents.
Agents Available/On Call/Wrapping Up/Idle	Number of agents working on this campaign activity in each agent state.
Records Loaded	Total number of records in the target group that passed validation.
Records Remaining	Records loaded minus Records Removed. Also calculated is the percentage of Records Remaining to Records Loaded. A percentage is also provided.
Records Currently Unavailable	Records that cannot currently be called. Also calculated is the percentage of Records Unavailable to Records Loaded.
Records Currently Available	Records that are currently callable. Also calculated is the percentage of Records Available to Records Loaded.
List Penetration	This is a measure of how much of the list we have consumed. It is calculated as: Records Removed/Records Loaded.
Predicted Exhaustion	Predicted exhaustion is the time after which we expect to run out of records in this list. Calculating it takes into account the current rate of record consumption and the total available records.
Quota Curr/Obj	This is a measure of how well we are attaining our objective quota. Objective quota is the value set as the desired quota for execution.Current quota is the actual quota value being attained by the AO servers.Quota Curr/Obj is calculated as: runtime quota / objective quota. This is blank if the target group has quantum set instead of quota.

Use the steps below to generate a Campaign Performance Statistics report in Oracle Advanced Outbound Telephony.

Prerequisite

To generate reports, your user account must be assigned the Oracle Advanced
Outbound Telephony Administrator responsibility.

Login

HTML Login URL

Responsibility

Oracle Advanced Outbound Telephony Administrator

Steps

1. Click the **Performance** tab.

2. From the side panel, click **Campaign Performance Statistics**.

   The Campaign Performance Statistics page appears, displaying the performance
   statistics for all campaigns/ activities targeted for Oracle Advanced Outbound
   Telephony execution.

3. To use the threshold features:

   1. Select the Separate by Range option if you want to separate the report results
      into rows for higher, lower, and within you range.

   2. From the Acceptable Range Quantity list, select the value you want.

   3. In the Acceptable Range Min field, type the minimum parameter for your
      report.

   4. In the Acceptable Range Max field, type the maximum parameter for your
      report.

   5. Click **Show Report**.

Related Topics:

- Viewing and Sorting Items, page 6-142

- Generating the Dialing Statistics Report, page 6-143

- Generating the Campaign Call Results Detail Report, page 6-146

Generating the Agent Call Results Detail Report:

Explanation of Report Results

Column Name	Description
Report Request Time	Browser time when report was requested.
Statistics as of	Time when AO servers last updated data.
Login Hours	Total Agent Login time.
Current Status	Idle, Talk, Wrap up, or Logged out.
Length of Time in Status	Time in Current Status.
Average Talk/Wrap up time	Average times calculated for this agent.
Utilization	Utilization is a measure of how much time is spent working on calls rather than waiting for a call to arrive. It is calculated as: (total talk time + total wrapup time)/(total wait time + total talk time + total wrapup time).
Calls Offered	Total dials serviced by this agent. Also calculated per hour.
Contact	Total live customers who were serviced by this agent. Also calculated per hour.
Sales	Total dials that resulted in a Sale for this agent. Also calculated per hour.

Column Name	Description
Pos Resp	Total dials that resulted in a Positive Response for this agent. Also calculated per hour.
Campaign Longest / Average / Shortest Talk / Available / Wrapup time	Longest / Average / Shortest calculated across all agents working on this activity.
Agent	Agent Name. Clicking the Agent's name gives you the 'Agent Call Results Detail' report for that agent.

The table at the bottom of the page displays the outcome/result codes for the calls placed by this agent working on this campaign activity. The table has a row for each unique outcome-result pair. The following describe the data presented on each of these outcome-result pairs.

Column Name	Description
Calls	Total calls placed that had this outcome-result pair.
Outcome-Result % of Calls	Percentage of total calls that had this outcome-result pair.
Outcome-Result % of Contacts	Percentage of contacts that had this outcome-result pair.
Outcome-Result % of Positive Responses	Percentage of positive response calls that had this outcome-result pair.
Result % of Outcome	Percentage of total calls with this outcome that had this result.
Outcome-Results per hour	Number of occurrences of this outcome-result pair per hour.
Calls	Total calls placed that had this outcome-result pair.
Outcome-Result % of Calls	Percentage of total calls that had this outcome-result pair.

The table on the right displays the login and logout/break times for this agent. Duration and Break Reason are also displayed.

Use the steps below generate a Agent Call Results Detail report in Oracle Advanced Outbound Telephony.

Prerequisite

To generate reports, your user account must be assigned the Oracle Advanced Outbound Telephony Administrator responsibility. You must have at least one agent user assigned to perform outbound telephony.

Login

HTML Login URL

Responsibility

Oracle Advanced Outbound Telephony Administrator

Steps

1. Click the **Performance** tab.

2. From the side panel, click the **Agent Call Results Detail** hyperlink.

   The Agent Call Results Detail page appears.

3. In the Select Agent Name field, type the last name of the agent for whom you want to generate a call results detail report and click **Go**.

   > **Note:** If you are unsure of the exact name you want to search for, you can use the "LIKE" operator. Type the first character or two of your search criteria, and use a wildcard (%).

   The Select a Name page appears, displaying a list of agent names that meet your search criteria.

4. From the list of agent names, click the appropriate hyperlinked name.

   The Agent Call Results Detail page refreshes to display the selected agent's name in the Select Agent Name field.

5. Click **Show Report**.

6. From the Campaign/Activity list, select the campaign or campaign activity on which you want to base the report results.

The Agent Call Result Detail page refreshes to display the report results for the selected agent.

Related Topics:

Generating the Campaign Time Zone Detail Report:

Explanation of Report Results

Column Name	Description
Campaign Activities	Displays the name of the selected campaign Activity.
Campaign	Displays the name of the campaign to which this campaign activity is associated.
Dialing Method	Displays the dialing method selected for the specified campaign activity.
Time Zone	Lists each separate time zone within the specified range.
Record Count	A tally of the number of available records in each separate time zone within the specified range.

Use the steps below to generate a Campaign Activity Record Summary Statistics report

in Oracle Advanced Outbound Telephony.

Prerequisite

To generate reports, your user account must be assigned the Oracle Advanced Outbound Telephony Administrator responsibility.

Login

HTML Login URL

Responsibility

Oracle Advanced Outbound Telephony Administrator

Steps

1. Click the **Performance** tab.

2. From the side panel, click **Campaign Time Zone Detail Report**.

   The Campaign Time Zone Detail Report page appears.

3. From the Campaign list, select the campaign on which you want to generate the time zone detail report.

4. Click **Show Report**.

   The Campaign Time Zone Detail Report page refreshes to display the generated report results.

Related Topics:

- Viewing and Sorting Items, page 6-142

- Generating the Dialing Statistics Report, page 6-143

- Generating the Campaign Call Results Detail Report, page 6-146

- Generating the Campaign Record Detail Statistics Report, page 6-149

- Generating the Campaign Record Summary Statistics Report, page 6-153

- Generating the Campaign Agent Performance Statistics Report, page 6-156

- Generating the Campaign Performance Statistics Report, page 6-160

- Generating the Agent Call Results Detail Report, page 6-164

Administration

Use the Administration page to configure server properties; create, modify or remove time zone mappings; and create, modify or remove region mappings.

Tasks:

You can perform the following tasks:

- Viewing and Sorting Items, page 6-169

- Server Properties, page 6-171

- Creating Time Zone Mappings, page 6-171

- Modifying Time Zone Mappings, page 6-173

- Removing Time Zone Mappings, page 6-175

- Creating Region Mappings, page 6-176

- Modifying Region Mappings, page 6-177

- Removing Region Mappings, page 6-179

Viewing and Sorting Items:

There are six tabs in the Oracle Advanced Outbound Telephony HTML Administration console, including: Campaign Activities, Algorithms, Calling Calendars, Telephony, Performance, and Administration. Many of these pages contain subtab menus.

Use the steps below to view or sort the contents of a selected page in the Oracle Advanced Outbound Telephony HTML Administration console.

Prerequisite

To access the Oracle Advanced Outbound Telephony HTML Administration console, your user account must be assigned the Oracle Advanced Outbound Telephony Administrator responsibility.

Login

HTML Login URL

Responsibility

Oracle Advanced Outbound Telephony Administrator

Steps

1. From the Oracle Advanced Outbound Telephony HTML Administration console, click the tab you want to view.

   The selected page appears, displaying a summary view table of its contents.

2. Click the subtab menu item you want to view (if other than the default).

   The selected subtab menu item's page appears, displaying a summary view table of its contents.

   > **Note:** The Oracle Advanced Outbound Telephony HTML Administration console always defaults to the first subtab's contents.

3. If there are more items than can fit in the page, click **First**, **Previous**, **Next**, or **Last** to continue viewing the items.

4. Click the column header by which you want to sort the contents of the summary view table.

   > **Note:** You can sort the summary view table items in either ascending or descending order by clicking any of the underlined column headers.

   A blue sort arrow appears to the right of the column heading. This arrow indicates whether you are sorting in ascending or descending order.

5. Click the arrow to reverse the sort order.

Related Topics:

- Creating Region Mappings, page 6-176

- Modifying Region Mappings, page 6-177

- Removing Region Mappings, page 6-179

Server Properties:

The Server Properties page allows you to view the server time zone. This is the timezone where the database is located.

The server time zone is set via the "Server Timezone" profile option. You cannot change it from the Oracle Advanced Outbound Telephony HTML Administration console. This profile option can be changed by logging into Forms with the System Administrator responsibility, but be aware that altering this profile option will change the server time zone for ALL Oracle Interaction Center applications.

If you change the server time zone profile, you will need to bounce the web (Apache) server before the change will take effect.

Related Topics:

- Viewing and Sorting Items, page 6-169

- Creating Time Zone Mappings, page 6-171

- Modifying Time Zone Mappings, page 6-173

- Removing Time Zone Mappings, page 6-175

- Creating Region Mappings, page 6-176

- Modifying Region Mappings, page 6-177

- Removing Region Mappings, page 6-179

Creating Time Zone Mappings:

Use the steps below to create a time zone mapping in Oracle Advanced Outbound Telephony.

Prerequisites

To create time zone mappings, your user account must be assigned the Oracle Advanced Outbound Telephony Administrator responsibility.

Login

HTML Login URL

Responsibility

Oracle Advanced Outbound Telephony Administrator

Steps

1. Click the **Administration** tab.

    The Administration tab appears, displaying the Server Properties subtab page. This is the default page for the Administration tab.

2. Click the **Time Zone Mappings** subtab.

    The Time Zone Mapping page appears, displaying a summary view table of all existing Time Zone mappings.

3. On the Time Zone Mapping page, click **Create Time Zone Mapping**.

    The Create Time Zone Mapping page appears.

4. In the Country Name field, click the flashlight icon.

    The Select a Country Name page appears.

5. From the list of country names, select the country name to which you want to map a time zone.

    The list in the Area Code field refreshes with all the area codes that have been defined for the selected country.

6. Optionally, from the list in the Area Code field, select an area code for the country name you selected in the previous step.

7. Optionally, in the Postal Code field, type a postal code for the area code you selected in the previous step.

8. Optionally, in the State/Region Field, type the appropriate state/region for the area code.

    > **Note:** The format for the state/region should be the entire state/region name with initial capitalization (for example, Nevada).

9. In the Time Zone field, click the flashlight icon.

The Select a Time Zone page appears, displaying a summary view table of all existing time zones.

10. From the Time Zone column of the summary view table, select the time zone to which you want to map the country code you selected.

11. Click **Create**.

The mapping between the selected country and time zone is created.

Related Topics:

Modifying Time Zone Mappings:

Use the steps below to modify a time zone mapping in Oracle Advanced Outbound Telephony.

Prerequisites

To modify time zone mappings, your user account must be assigned the Oracle Advanced Outbound Telephony Administrator responsibility.

Login

HTML Login URL

Responsibility

Oracle Advanced Outbound Telephony Administrator

Steps

1. Click the **Administration** tab.

   The Administration tab appears, displaying the Server Properties subtab page. This is the default page for the Administration tab.

2. Click the **Time Zone Mappings** subtab.

   The Time Zone Mapping page appears, displaying a summary view table of all existing time zone mappings.

3. From the Country Name column of the summary view table, click the country name for the time zone mapping you want to modify.

   The Time Zone Mapping Details page appears.

4. Modify the time zone mapping as needed.

   1. To change the country name to which the timezone is mapped: In the Country Name field, click the flashlight icon. When the Select a Country Name page appears, select the country name to which you want to map the time zone from the list of country names.

   2. To change the area code: From the list in the Area Code field, select an area code for the country name you selected in the previous step.

   3. To change the postal code: In the Postal Code field, type a postal code for the area code you selected in the previous step.

   4. To change the state/region: In the State/Region Field, type the appropriate state/region for the area code selected in step b.

      > **Note:** The format for the state/region should be the entire state/region name with initial capitalization (for example, Nevada).

   5. To change the time zone: In the Time Zone field, click the flashlight icon. when the Select a Time Zone page appears, select the time zone to which you want to map the country you selected.

5. Click **Update**.

   The modified mapping between the selected country and time zone is saved.

Related Topics:

- Viewing and Sorting Items, page 6-169

- Server Properties, page 6-171

- Creating Time Zone Mappings, page 6-171

- Removing Time Zone Mappings, page 6-175

- Creating Region Mappings, page 6-176

- Modifying Region Mappings, page 6-177

- Removing Region Mappings, page 6-179

Removing Time Zone Mappings:

Use the steps below to remove a time zone mapping from Oracle Advanced Outbound Telephony.

Prerequisites

To remove time zone mappings, your user account must be assigned the Oracle Advanced Outbound Telephony Administrator responsibility.

Login

HTML Login URL

Responsibility

Oracle Advanced Outbound Telephony Administrator

Steps

1. Click the **Administration** tab.

   The Administration tab appears, displaying the Server Properties subtab page. This is the default page for the Administration tab.

2. Click the **Time Zone Mappings** subtab.

   The Time Zone Mapping page appears, displaying a summary view table of all existing time zone mappings.

3. From the Remove column of the summary view table, click the box for the time

zone mapping you want to remove.

4. Click **Update**.

The selected time zone mapping is removed.

Related Topics:

- Viewing and Sorting Items, page 6-169

- Server Properties, page 6-171

- Creating Time Zone Mappings, page 6-171

- Modifying Time Zone Mappings, page 6-173

- Creating Region Mappings, page 6-176

- Modifying Region Mappings, page 6-177

- Removing Region Mappings, page 6-179

Creating Region Mappings:

Use the steps below to create a region (area code) mapping in Oracle Advanced
Outbound Telephony.

Prerequisites

To create region mappings, your user account must be assigned the Oracle Advanced
Outbound Telephony Administrator responsibility.

Login

HTML Login URL

Responsibility

Oracle Advanced Outbound Telephony Administrator

Steps

1. Click the **Administration** tab.

The Administration tab appears, displaying the Server Properties subtab page. This
is the default page for the Administration tab.

2. Click the **Region Mappings** subtab.

   The Region Mapping page appears, displaying a summary view table of all existing region mappings.

3. Click **Create Region Mapping**.

   The Create Region Mapping page appears.

4. In the Area Code field, click the flashlight icon.

   The Select a Area Code page appears.

5. From the Country Name list, select a country name.

   You return to the Area Code Mapping page. The selected Country Name appears in the Country Name field.

6. In the Area Code field, search for and select an area code for the selected country.

   The Create Region Mapping page refreshes to display the selected area code.

7. In the Region Name field, search for and select the appropriate region.

8. Click **Create**.

   The Region Mapping page updates to reflect the new region mapping.

Related Topics:

- Viewing and Sorting Items, page 6-169

- Server Properties, page 6-171

- Creating Time Zone Mappings, page 6-171

- Modifying Time Zone Mappings, page 6-173

- Removing Time Zone Mappings, page 6-175

- Modifying Region Mappings, page 6-177

- Removing Region Mappings, page 6-179

Modifying Area Code Mappings:

Use the steps below to modify a region (area code) mapping in Oracle Advanced Outbound Telephony.

Prerequisites

To modify a region mapping, your user account must be assigned the Oracle Advanced Outbound Telephony Administrator responsibility.

Login

HTML Login URL

Responsibility

Oracle Advanced Outbound Telephony Administrator

Steps

1. Click the Administration tab.

    The Administration tab appears, displaying the Server Properties subtab page. This is the default page for the Administration tab.

2. Click the **Region Mappings** subtab.

    The Region Mapping page appears, displaying a summary view table of all existing region mappings.

3. From the Country Name column, click the region mapping you want to modify.

    The Region Mapping Details page appears.

4. In the Area Code field, click the flashlight icon.

    The Select a Area Code page appears.

5. From the Country Name list, select a country name.

    You return to the Area Code Mapping page. The selected Country Name appears in the Country Name field.

6. In the Area Code field, search for and select a new area code for the selected country.

7. Click **Update**.

    The modified region mapping is saved.

Related Topics:

- Viewing and Sorting Items, page 6-169

- Server Properties, page 6-171

- Creating Time Zone Mappings, page 6-171

- Modifying Time Zone Mappings, page 6-173

- Removing Time Zone Mappings, page 6-175

- Creating Region Mappings, page 6-176

- Removing Region Mappings, page 6-179

Removing Area Code Mappings:

Use the steps below to remove a region (area code) mapping in Oracle Advanced Outbound Telephony.

Prerequisites

To remove region mappings, your user account must be assigned the Oracle Advanced Outbound Telephony Administrator responsibility.

Login

HTML Login URL

Responsibility

Oracle Advanced Outbound Telephony Administrator

Steps

1. Click the **Administration** tab.

   The Administration tab appears, displaying the Server Properties subtab page. This is the default page for the Administration tab.

2. Click the **Region Mappings** subtab.

   The Region Mapping page appears, displaying a summary view table of all existing area code mappings.

3. In the Remove column of the summary view table, click the box for the region mapping you want to remove.

4. Click **Update**.

   The selected region mapping is removed from the summary view table.

Related Topics:

- Viewing and Sorting Items, page 6-169

- Server Properties, page 6-171

- Creating Time Zone Mappings, page 6-171

- Modifying Time Zone Mappings, page 6-173

- Removing Time Zone Mappings, page 6-175

- Creating Region Mappings, page 6-176

- Modifying Region Mappings, page 6-177

7

Diagnostics and Troubleshooting

This chapter covers the following topics:

- Failover and Load Balancing Behavior
- Diagnostic Tools
- Troubleshooting Oracle Advanced Outbound Telephony
- Oracle Advanced Outbound Telephony Central Server Troubleshooting
- Oracle Advanced Outbound Telephony Dial Server Troubleshooting

Failover and Load Balancing Behavior

Oracle Advanced Outbound Telephony provides the following failover and load balancing actions:

Setup 1:

More than one dial server configured within the same server group.

Failure Situation 1:

One dial server goes down.

Fail over Action 1:

On the next agent request, Oracle Advanced Outbound Telephony automatically logs in the agent to the functioning dial server and begins to service the agent through the new dial server.

Setup 2:

One or more dial server configured within the same server group.

Failure Situation 2:

UWQ server goes down and then comes back up.

Fail over Action 2:

If the agents do not shut down their UWQ Clients (Forms desktops), then when the UWQ server comes back up, the agents will automatically (without having to make a request) be logged into the same UWQ server and dial server as they were before the UWQ server went down.

If the agents shut down their UWQ Clients (Forms desktops), then they will need to log back in when the UWQ server comes back up. The agents will be logged into the same UWQ server and dial server as they were before the UWQ server went down.

Setup 3:

Another physical server box is configured within ICSM and has been designated as a warm hardware backup; one or more dial servers are configured in the server group.

Failure Situation 3:

The dial server is not responding and appears to be down; ICSM is not getting a heartbeat from server box.

Fail over Action 3:

ICSM will start another instance of the dial server on the warm backup server box. On the next agent request, Oracle Advanced Outbound Telephony will automatically login the agent to the other dial server and begins to service the agent through the new dial server.

Setup 4:

Another physical server box is configured within ICSM, and has been designated as a warm hardware backup; one or more dial servers are configured in the server group.

Failure Situation 4:

The dial server is not responding and appears to be down (possibly due to a network glitch), then the dial server seems to become available again and reappears.

Fail over Action 4:

ICSM will start another instance of the dial server on the warm backup server box. On the next agent request, Oracle Advanced Outbound Telephony will automatically login

the agent to the duplicated dial server and begin to service the agent through the duplicated dial server. When the machine running the original dial server appears on the network again, the original dial server will recognize that a duplicate dial server (same ID) is running and will automatically shut itself down.

Load Balancing:

Each dial server maintains and calculates the Oracle Advanced Outbound Telephony runtime parameter - Major Load Factor (MLF). The calculation is based on the number of agent logins. New agents will be logged into servers with lower MLF. Agents will be logged in at a grainularity of ten - meaning Oracle Advanced Outbound Telephony will determine which server currently has the lowest MLF and the next ten agents who log in will be placed on that server. After the tenth agent logs in, Oracle Advanced Outbound Telephony will again evaluate each server's MLF.

Diagnostic Tools

There are a number of tools you can use to diagnose problems with Oracle Advanced Outbound Telephony, including:

- Oracle Interaction Center Server Manager (ICSM), page 7-3

- The Oracle Advanced Outbound Telephony HTML Administration Console, page 7-8

- The Marketing Online HTML Administration Console, page 7-12

- Java Console Logs, page 7-14

Using Oracle ICSM to Diagnose Issues:

With Oracle Interaction Center Server Manager (ICSM), you can:

- Start and Stop Servers, page 7-3

- Set Server Log Levels, page 7-4

- Set Trace File Options, page 7-5

- Check Server Log Messages, page 7-7

- Check Server Parameter Settings, page 7-8

Starting and Stopping Servers With ICSM

Follow the steps below to start or stop your servers with Oracle ICSM.

Login

Self-Service Login URL

Responsibility

Call Center HTML Administration

Steps

1. Click **ICSM > Server Groups**.

   The Server Group List page appears.

2. Click a server group name.

   The Server Group Details page appears, displaying a summary view table of all servers in that group.

3. From the list to the left of the Submit button:

   1. Select **Start** to start the selected server

   2. Select **Stop** to stop the selected server.

4. Click **Submit**.

   It may take several minutes to start or stop the server processes. To view the current status during startup or shutdown, refresh the browser several times.

   As the server processes are starting up, "Starting" is displayed in the Stop/Start column. As the server processes are shutting down up, "Stopping" is displayed in the Stop/Start column. The status of each server process is displayed in the Servers area in the Status column.

Setting Server Log Levels With ICSM

You can use the database logging function to obtain information about when servers are started or stopped, and the reasons why they started or stopped.

Login

HTML Login URL

Responsibility

Call Center HTML Administration

Steps

1. Click **ICSM > Server Groups**.

   The Server Group List page appears, displaying a summary view table of any existing server groups.

2. From the Server Group Name column, click the server group that contains the server on which you want to set log levels.

   The Server Group Details page appears for the selected server group, displaying a summary view table of any servers in that server group.

3. From the Server Name column, click the server on which you want to set log levels.

   The Server Details page appears for the selected server.

4. From the Server Details page, click the **Parameters** hyperlink.

   The Server Details page refreshes to display a summary view table for parameter settings.

5. In the Parameter Value field for OAO_LOG_LEVEL, type one of the following levels:

   - **error** - shows server errors.

   - **warn** - shows server warnings and errors

   - **info** - shows events, warnings, and errors

   - **all** - shows all server activity

     The log level can be changed while the server is running, but you must wait for the time period specified in the OAO_ REFRESH_INTERVAL parameter before the information in the log begins reflecting the new log level.

6. Click **Update**.

7. Click **Done**.

Setting Trace File Options With ICSM

You can use the server trace function to obtain detailed information about server activity. By default the trace function is not activated.

Use the steps below to activate the trace function.

Login

HTML Login URL

Responsibility

Call Center HTML Administration

Steps

1. From the Oracle Call Center Technology page, click the **ICSM** tab.

    The Server Group List page appears, displaying a summary view table of any existing server groups.

2. From the Server Group Name column, click the server group that contains the server on which you want to run the tracing function.

    The Server Group Details page appears for the selected server group, displaying a summary view table of any servers in that server group.

3. From the Server Name column, click the server on which you want to run the tracing function.

    The Server Details page appears for the selected server.

4. From the Server Details page, click the **Advanced** hyperlink.

    The Server Details page refreshes to display a Java Options field, a Server Arguments field, and a summary view table of any existing trace files for the selected server.

5. In the Java Options field, type the following:

    -ms128m -mx256m -DAFLOG_MODULE=iec% -DAFLOG_ENABLED=FALSE -DAFLOG_LEVEL=STATEMENT -DAFLOG_FILENAME=prs.log

    The –ms and –mx VM parameters should be set depending on the number of agents you expect to service. These are the minimum and maximum values for the Virtual Machine. These values cannot be changed dynamically; you will need to restart the server for changes to take effect.

    Oracle recommends you set these parameters to -ms128m -mx256m. Refer to the *Before You Begin* section of this guide, for information on what values to enter for these parameters.

    The -DAFLOG_LEVEL parameter can have values (in increasing order of severity):

    - STATEMENT

- PROCEDURE

- EVENT

- EXCEPTION

- ERROR

- UNEXPECTED

6. In the Server Arguments field, type the following:

   -AFLOG_ENABLED TRUE

   > **Note:** You will need to bounce the server to start or stop the tracing process.

7. Click **Update**.

8. Click **Done**.

Checking Server Log Messages With ICSM

Follow the steps below to check the server log messages.

Login

HTML Login URL

Responsibility

CRM HTML Administration

Steps

1. Click the **Settings** tab.

2. Click the **System** subtab.

3. From the side panel, click **Debug Logging > Messages**.

   The Debug Log Viewer page appears.

4. In the Module field, type **iec%** to only see Oracle Advanced Outbound Telephony logs.

Checking Server Parameter Settings With ICSM

Follow the steps below to check server parameter settings.

Login

HTML Login URL

Responsibility

Call Center HTML Administration

Steps

1. Click **ICSM > Server Groups**.

    The Server Group List page appears, displaying a summary view table of any existing server groups.

2. From the Server Group Name column, click the server group that contains the server on which you want to set log levels.

    The Server Group Details page appears for the selected server group, displaying a summary view table of any servers in that server group.

3. From the Server Name column, click the server on which you want to set log levels.

    The Server Details page appears for the selected server.

4. From the Server Details page, click the **Parameters** hyperlink.

    The Server Details page refreshes to display a summary view table of the parameter settings for the selected server.

5. Verify that the parameter settings are correct.

    For a detailed list of the necessary parameters for Oracle Advanced Outbound Telephony servers, refer to the Implementing the Oracle Advanced Outbound , page 5-21Telephony Servers section.

Using the Oracle Advanced Outbound Telephony HTML Admin Console to Diagnose Issues:

You can use the Oracle Advanced Outbound Telephony HTML Administration console to:

*   Check Campaign Activity Parameters, page 7-9

*   Check Target Group Parameters, page 7-10

Checking Campaign Activity Parameters in Oracle Advanced Outbound Telephony

Follow the steps below to check campaign activity parameters in the Oracle Advanced Outbound Telephony HTML Admin console.

Login

HTML Login URL

Responsibility

Oracle Advanced Outbound Telephony Administrator

Steps:

1. From the View field, select **My Campaign Activities** to check the parameters for a campaign activity you created in Oracle Marketing.

2. From the Name column of the summary view table on the Campaign Activities page, click the name of the campaign activity you want to check.

    > **Note:** If you do not see the desired campaign activity displayed, check Oracle Marketing to ensure the campaign activity is configured properly.

    The Call Center Campaign Activity Details page appears, displaying a Call Center Parameters area.

3. In the Calendar field, verify the correct the user defined calendar is associated with the selected campaign activity (if you want one to be).

4. Do you want the CTI Disabled checkbox selected?

    Checking this box disables computer telephony for the selected campaign activity. With CTI disabled, only manual dialing is allowed.

5. Is the On Hold checkbox selected?

    Selecting the On Hold checkbox will place on hold a campaign activity with a status of Active.

6. Once you have made changes, click **Update**.

    You return to the Call Center Campaign Activity Details page and a confirmation note is displayed, stating that the configuration was successful.

Checking Target Group Parameters in Oracle Advanced Outbound Telephony

Follow the steps below to check target group parameters in the Oracle Advanced Outbound Telephony HTML Admin console.

Login

HTML Login URL

Responsibility

Oracle Advanced Outbound Telephony Administrator

Steps

1. From the View field, select **My Campaign Activities**.

2. From the Name column of the summary view table on the Campaign Activities page, click the name of the campaign activity containing the target group you want to check.

   The Call Center Campaign Activity Details page appears, displaying a Call Center Parameters area.

3. From the side navigation bar, click **Campaign Activity Target Groups**.

   The Interaction Center Campaign Activity Target Groups page appears, displaying a summary view table of the target group associated to the selected campaign activity.

4. From the Name column of the summary view table, click the name of the target group for which you want to check parameters.

   The Interaction Center Campaign Activity Target Group Details page appears.

5. From the drop-down list in the Dialing Method field, verify your dialing method selection or select to default to the campaign activity's dialing method.

6. From the drop-down list in the Target Group Priority field, check the priority assigned to the target group.

   > **Note:** Priorities determine the relative priority of a target group or subset in comparison to other target groups and subsets.

   > **Note:** Highest through Medium level priorities are preemptive; all target groups with priorities in this range will be exhausted in

priority sequence before the next priority level is used. Low and Lowest priorities are used in round-robin fashion; each of these target groups will release its quantum of records, then the next target group in the same priority level will be used.

Note: At this time, Oracle Marketing does not support multiple target groups.

7. From the drop-down list in the Recycling Algorithm field, verify you have selected the recycling algorithm you want to use for the target group.

8. From the drop-down list in the Record Filter field, check that you have selected the record filter rule you want to use with the target group.

9. From the drop-down list in the Validation Rule field, check that you have selected the validation rule you want to use with the target group.

10. From the drop-down list in the Calendar field, verify that you have selected the user defined calendar you want to use with the target group (if you want to use one).

11. From the drop-down list in the Release Strategy field, verify you have selected the correct release strategy to use with the target group.

> **Note:** The quantum release strategy supports proportional calling across all target groups and subsets associated with the campaign strategy and it is considered the baseline strategy for an Oracle Advanced Outbound Telephony service. This means that when Oracle Advanced Outbound Telephony is distributing customer records to agents, it releases a quantum number of records from each target group or subset before it goes on to the next target group or subset in the campaign.

> **Note:** The Quota Release Strategy stops releasing records from a target group or subset when a pre-defined limit has been reached. This strategy disburses records from a target group or subset based on the quota that is assigned to a target group or subset.

12. Check the number of records you set as your limit in either the Quantum or Quota field.

> **Note:** If you selected **Quota** in step 11, you must select the hour and minute reset period from the drop-down list in each respective field. These fields specify the hours and minutes before the quota value is reset to zero (0).

13. Once you have made your changes, click **Update**.

    The Interaction Center Campaign Activity Target Group Details pages updates to reflect the new dialing parameters and displays a confirmation stating that the dialing parameters have been configured successfully.

Using the Oracle Marketing HTML Admin Console to Diagnose Issues:

You can use the Oracle Marketing HTML Administration console to:

- Check Campaign Activities and Target Group Parameters, page 7-12

- Check the Agent to Campaign Assignment, page 7-13

Checking Campaign Activity and Target Group Parameters

Follow the steps below to check campaign activity and target group parameters in Oracle Marketing.

Login

HTML Login URL

Responsibility

Oracle Marketing Super User

Steps

1. Click the **Campaign** tab.

    The Campaigns page appears, displaying a summary view table of all existing campaigns.

2. From the table, select the campaign containing the campaign activity in which you want to view parameters.

    The Campaign Details page appears.

3. From the side navigation panel, click **Execution**.

    The Campaign Details - Campaign Activity page appears, displaying a summary view table of all campaign activities associated with the selected campaign.

4. From the summary view table, click the campaign activity in which you want to view parameters.

   The Campaign Activity – Details page appears.

5. Verify the campaign activity parameters.

   For more information on campaign activity, refer to the Oracle Marketing User Guide.

6. From the side navigation panel, click **Execution > Target Group**.

   The Campaign Activity Details - Target Group page appears.

7. Verify the target group parameters.

   For more information on target group parameters, refer to the Configuring an , page 5-38Oracle Marketing List, and Configuring an Oracle Marketing Target Group , page 5-41topics in this guide.

Checking the Agent to Campaign Activity Assignment

Follow the steps below to check the agent to campaign activity assignment in Oracle Marketing.

Login

HTML Login URL

Responsibility

Oracle Marketing Super User

Steps

1. From the Oracle Marketing homepage, click the **Administration** tab.

2. Click the **Sales** subtab.

3. From the side panel under Call Center, click the **Agent Assignments** hyperlink.

   The Resource Assignment window appears.

4. In the Campaign Name field, type the name or a partial name of the appropriate campaign activity. You can use the % sign to substitute for missing characters.

5. Click **Go**.

6. From the list, select the appropriate campaign activity and click **OK**.

The campaign activity name populates the Campaign Name field. and the Current Resource Assignments table refreshes to display all the agents currently assigned to the selected campaign activity.

7. Verify that the correct agents are assigned.

Using Java Console Logs to Diagnose Issues:

The Java Console is a pop-up window that you can configure to appear whenever you launch an Oracle Forms session.

You can use the Java console logs to track application trace messages, to verify server information from the agent side, and to diagnose problems when dealing with multiple servers.

Troubleshooting Oracle Advanced Outbound Telephony

The following are the most commonly experienced errors with Oracle Advanced Outbound Telephony:

*   Servers Won't Start

*   Validation Failed

*   Validation Doesn't Fail, but no Records are Returned

*   Can't See Oracle Advanced Outbound Telephony Media Node

*   No Campaign Activities Appear

*   Queue Count Doesn't Update

*   Central Server Isn't Pulling Records

*   No More Callable Records for an Agent

*   Agent Cannot Make Progressive Calls

*   Oracle Telephony Manager Cannot Get Media Items From Oracle Advanced Outbound Telephony

*   Oracle Telephony Manager Received two Media Items for the Same Oracle Advanced Outbound Telephony Call

*   Media Items Were Not Closed

*   Oracle Advanced Outbound Telephony Fails in the Dial Server, but no "Enabler Related Errors" are Generated

- Target Group Stuck in Validating Status

- No Longer Seeing IEO Log Messages

Servers Won't Start:

Reason:

No database connection.

Check:

Check the .dbc file. Make sure that NUM_CONNECTIONS in dbc file is set high enough.

Reason:

ICSM setup is incorrect.

Check:

Check server arguments (ICSM - Advanced link).

Reason:

Server or plugin parameters are incorrect.

Check:

Verify the server parameters are correct

Ensure the values set in ICSM (Advanced link) are correct

Ensure Java arguments set to at least "-ms256m mx256m"

Ensure server node is running (ICSM).

Start the server at the local node using a local script.

Validation Failed:

- Make sure your Central Server and Dial Server(s) are running and set your trace level to **All**.

- Make sure your Oracle Marketing Campaign and Campaign Activity are **Active**.

- Make sure your Oracle Marketing Target Group has a status of **Locked**.

- Make sure the Interaction Center Ready column of your Oracle Advanced Outbound Telephony Campaign Activity is set to **Yes**.

- Make sure your Oracle Advanced Outbound Telephony Campaign Activity Target Group parameters are correctly configured.

Reason:

Oracle Marketing Source Type does not exist or Oracle Marketing Source Type does not have required columns

Check:

Check the logs files for the following error messages:

- Error messages titled 'Validation Error'.

- "ORA-00942: table or view does not exist"

- "Source type view XXX has not been created in Oracle Marketing"

- "ORA-00904: invalid column name"

- "Source type view XXX is missing one or more columns."

Solution:

Create or update the Oracle Marketing list source type. Ensure all the required fields are present.

Reason:

Insufficient Table Space

Check:

Check the log files the following error message:

- "ORA-01654: unable to extend index IEC.IEC_G_RETURN_ENTRIES_N3 by 8195 in tablespace IECX"

Solution:

Ask your DBA to extend the table space specified in the error message.

Validation Doesn't Fail, but no Records are Returned:

Reason:

- Missing Time Zone Information

- Missing country code or area code

- Phone number contains invalid characters

Check:

- Check time zone and time in the user record

- Check country code/area code in user record

- Check user phone numbers

Solutions:

- Add missing data/correct error data

- Create validation rules to insert time zone

- Create validation rules to add country code/area code

Can't See Oracle Advanced Outbound Telephony Media Node:

Reason:

The agent's profile options are not set correctly

Check:

The profile settings for the agent.

1. Self-Service Login URL (Forms).

2. Select **System Administrator** responsibility.

3. Click **Profile > System**.

4. Type agent's user ID and click **Find**.

Solution:

Ensure the following profile options are set:

- "IEU: Queue Order: Oracle Advanced Outbound Telephony" – set to "1"

- "IEU: Queue: Oracle Advanced Outbound Telephony" – set to "Yes"

No Campaign Activities Appear:

Reason:

The agent, or group to which the agent belongs, is not assigned to a campaign activity

Check:

Ensure that the agent (or group that the agent belongs to) is assigned to a campaign activity

Reason:

The concurrent manager has not been started

Check:

Ensure the concurrent manager is running

Queue Count Doesn't Update:

Reason:

The concurrent manager is not running.

Check:

Ensure the concurrent manager has been started.

> **Note:** The queue count only changes when the concurrent manager is running. The count only reflects changes in:
>
> - the number of records that are set to "Do Not Use" (by recycling).

- the number of records that are no longer calendar callable (fall outside the callable time parameters as defined in the calling calendar).

Central Server Isn't Pulling Records:

Reason:

Server Time Zone is not configured.

Check:

Check the log messages for any error messages with title "Calendar Error".

Solution:

Configure Server Time Zone in the Oracle Advanced Outbound Telephony Administration console.

Reason:

Country calendar does not exist.

Check:

Check the country calendar in the Oracle Advanced Outbound Telephony Administration console.

Solution:

Create the country calendar.

No More Callable Records for an Agent:

Check:

- Check if the correct campaign shows up on the UWQ desktop for this agent.

- Check the campaign record count.

- Check if the status of the campaign is active.

- Ensure the status of the corresponding target group is "Executing".

- Check the Campaign Record Details report to see if there are any records currently available.

- Check the Timezone report to see if there are any callable records at this time.

- Check if the Central Server is running. Wait for at least 2 * Retrieve interval and see if this happens again.

- Check if a calling calendar has been assigned to the campaign.

- Check if a calling calendar has been assigned to the target group.

- Check if the release strategy and the corresponding value has been set.

- Check Quantum - Quantum value and Quota - Quota value.

- Check if the database server time zone has been set.

- Check the refresh and recover parameter values on the central server.

Agent Cannot Make Progressive Calls:

Reasons:

- Middleware configuration error.

- CCC is not running.

Check:

Check for these errors in dial server trace file:

- "no middleware"

- "cannot connect to proxy server …"

- "cannot connect to cti server…"

- "enabler related error …"

Solution:

- Check middleware IP address, port number, CTI server ID, PBX name, etc.

- Ensure Call Center Connectors is running.

Oracle Telephony Manager Cannot Get Media Items From Oracle Advanced Outbound Telephony:

Reason:

Middleware configuration error.

Solution:

If middleware is CT_CONNECT, make sure "enable server application data" in CT_CONNECT configuration is selected.

Oracle Telephony Manager Received Two Media Items for the Same Oracle Advanced Outbound Telephony Call:

Reason:

Middleware configuration error.

Solution:

If middleware is CT_CONNECT, make sure "enable server application data" in CT_CONNECT configuration is selected.

Media Items Were Not Closed:

Reason:

Middleware configuration error.

Solution:

If middleware is CT_CONNECT, make sure "enable server application data" in CT_CONNECT configuration is selected.

Oracle Advanced Outbound Telephony Fails in the Dial Server, but no "Enabler Related Errors" Are Generated:

Check:

- Examine the Call Center Connectors log (log level must be 4). Determine if the number actually dialed has proper "prefix", (external access prefix, long distance prefix, etc...).

- If no prefix, check middleware configuration, domestic dialing prefix, international dialing prefix, outgoing prefix, site area code, site country code, site overlay, site internal number length, site local number maximum length, etc...

Oracle Advanced Outbound Telephony Central Server Troubleshooting

This topic group contains information to help you resolve common problems with the AO Central Server.

The following topics are included:

- Cannot Start the Server, page 7-22

- AOCS starts but does not get records, page 7-22

Cannot Start the Server:

1. No database connection

   Check the .dbc file, make sure that NUM_CONNECTIONS in dbc file is high enough.

2. ICSM setup is incorrectly

   Check server arguments.

3. Server or plugin parameters are incorrect.
   - Check if the parameters have been added

   - Check if the values set in ICSM (Advanced link) are correct

   - Make sure the server node is running (ICSM). If the server is not running, try to start the server again from ICSM

   - Try to start the server at the local node using a local script.

4. DB Server Time Zone is incorrect.

   Correct the DB Server Time Zone using the AO Administrator utility, under the Administration Tab.

5. Another OCS is running.

   Use ICSM to check/change server status.

AOCS Starts but Does not get Records:

1. Make sure the activity has been marked for Telemarketing.

2. Make sure the activity has a status of 'LOCKED'.

3. Make sure the target group has been generated for the activity using lists that have been generated using one of the two supported source types.

4. Make sure the target group has a status of 'LOCKED' in order to validate target group.

5. Make sure that the list is executing.

Oracle Advanced Outbound Telephony Dial Server Troubleshooting

This topic group contains information to help you resolve common problems with the AO Dial Server.

The following topics are included:

- Server Does not Start, page 7-23

- Agent Was Not Able to Log in, page 7-24

- Agent Cannot Get Work, page 7-24

- Dials Cannot be Placed, page 7-24

- Receiving Too Few Records for Target Group, page 7-24

- Receiving no Records, page 7-25

- Failed Validation, page 7-25

- Target Group Stuck in Validating Status, page 7-26

- No Longer Seeing IEO Log Messages, page 7-27

Server Does Not Start:

1. No database connection

   Check the dbc file

2. ICSM setup is incorrect

   Check server arguments

3. Server parameters are incorrect

4. Another Dial Server is running with the same server id

Use ICSM to check/change server status

Agent Was Not Able to Log in:

1. Make sure that the agent is assigned the System Profile for AO

   Use the System Administrator Responsibility, and click **System**, then **Profile**. Set the AO profile parameters to **Yes**.

2. Make sure that the agent is assigned to one of the running campaign activities.

3. Make sure that there are valid executing campaign activities.

Agent Cannot Get Work:

1. Check if the agent/campaign activity association is set.

2. Check if the campaign activity/target group is in the correct state and that the calendar is callable.

3. Check the number of available records in this target group.

4. Records may not be in cache, check if Central Server has been started; check the execution interval of the Refresh plugin.

5. Wait and test again.

Dials Cannot be Placed:

1. Make sure that the correct extension was provided.

2. Make sure that the middlewares in your server group are configured correctly (use the Call Center HTML Administrator responsibility, "Middleware" tab).

   Check the IP address and the port of Telephony Adapter Server.

   Make sure that the middleware parameters are set for Oracle Advanced Outbound Telephony use (including setting the "Use with Oracle Advanced Outbound Telephony" parameter to **Yes**.

3. Make sure that the Telephony Adapter Server is up.

Receiving Too Few Records for Target Group:

1. Check to ensure there is a country calendar defined for each country code used in the target group.

2. Check to ensure each target groups source type matches the source type defined for

the target group.

Receiving no Records:

1. Check to ensure the source type defined for the target group matches the source type defined for the target groups.

2. If list validation fails, you should check the AO central server log files (via Oracle Call Center Technology Admin - ICSM tab). If you see a message indicating that the database view is missing, you must go into the Oracle Marketing Administration console and select data source types for Organization Contacts and Person List, then click **Update**.

Failed Validation:

- Make sure your Central Server and Dial Server(s) are running and set your trace level to **All**.

- Make sure your Oracle Marketing campaign and campaign activity are **Active**.

- Make sure your Oracle Marketing Target Group has a status of **Locked**.

- Make sure the Interaction Center Ready column of your Oracle Advanced Outbound Telephony Campaign Activity is set to **Yes**.

- Make sure your Oracle Advanced Outbound Telephony Campaign Activity Target Group parameters are correctly configured.

Oracle Marketing source types do not exist or do not have the required columns

Use the steps below to diagnose this problem:

Login

HTML Login URL

Responsibility

Call Center HTML Administration

Steps

1. Click the **ICSM** tab.

The Server Group List page appears, displaying a summary view table os any existing server groups.

2. From the top bar, click **Logs**.

   The Summary Report for Servers page appears, displaying a summary view table of all the servers in the group.

3. From the list of servers, locate the appropriate server and click the hyperlink to display the log error messages.

   The Detail Report page appears, displaying a summary view table of all the error messages for the selected server.

4. In the Title column of the summary view table, search for error messages titled "Validation Error".

5. Click the **Record ID** hyperlink to display the error message in the Message Description text box.

6. Check for the following error messages:

   - ORA-00942: table or view does not exist

     Source type view XXX has not been created in Oracle Marketing

   - Ora-00904: invalid column name

     Source type view XXX is missing one or more columns

If you locate these error messages, you must create or update the Oracle Marketing Source type view. Follow the steps in the Defining List Source Types topic to do so.

Target Group Stuck in Validating Status:

If a target group stays in the 'Validating' status for an extended period of time, it is likely the case that validation has failed, but was unable to update the status to "Failed Validation". This usually occurs when there is a tablespace issue and the error message could not be logged. After the tablespace is increased, the target group will automatically resume validation.

Check:

Check your table space sizes.

Solution:

Although the exact tablespace configuration will depend on what applications are running in the database and needs to be reviewed by a dba, Oracle recommends the following sizes for a sytem configured exclusively for AO:

- TEMP (500 MB)

- USER_DATA and USER_IDX (300 MB)

No Longer Seeing IEO Log Messages:

If you stop seeing new error messages (beyond a specific date) in the IEO Log Viewer, it is very likely that you need to extend your tablespace. This is especially true if you are running into other errors that cannot be explained since other parts of the application may be failing, but are unable to log the errors due to the tablespace issues.

Check:

Check your table space sizes.

Solution:

Although the exact tablespace configuration will depend on what applications are running in the database and needs to be reviewed by a dba, Oracle recommends the following sizes for a sytem configured exclusively for AO:

- TEMP (500 MB)

- USER_DATA and USER_IDX (300 MB)

8

Seed Data

This chapter covers the following topics:

- Adding Do Not Use Reason Codes
- Adding Priority Values
- Setting the Positive Flag for Outcome and Result Codes

Adding Do Not Use Reason Codes

Use the steps below to create additional Do Not Use Reason Codes.

Login

Self-Service Login URL (Forms)

Responsibility

Applications Developer

Steps

1. Click **Application**, **Lookups**, then **Application Object Library**.

   The Application Utilities Lookups window appears.

2. On the main toolbar of the Application Utilities Lookups window, click **View**, **query by example**, then **enter**.

3. Type **IEC%** in the query field.

4. On the main toolbar, click **View**, **query by example**, then **run query**.

5. From the list of returned values, locate the IEC_DNU_RESASON table.

6. Once you have located this table, you can create additional values by clicking the empty field directly below the last entry and typing in your values.

> **Note:** When you click an empty field, the Extensible radio button should automatically be selected. If not, be sure to select this radio button as it allows you to add values other than the seeded one.

Adding Priority Values

Priorities values determine the relative priority of a campaign activity or subset in comparison to other campaign activities and subsets.

These priority values can be set for the following:

- Campaigns and Campaign Activities - should be set in forms with the Oracle Marketing Administrator responsibility.

- Subsets - should be set in forms with the Application Developer responsibility.

If either of these responsibilities are not available to you, please contact you system administrator to have them added.

Highest through Medium level priorities are preemptive; all campaign activities and subsets with priorities in this range will be exhausted in priority sequence before the next priority level is used. Low and Lowest priorities are used in round-robin fashion; each of these campaign activities and subsets will release its quantum of records, then the next campaign activities and subsets in the same priority level will be used.

- Adding Campaign and Campaign Activity Priority Values, page 8-2

- Adding Subset Priority Values, page 8-3

Adding Campaign and Campaign Activity Priority Values

Use the steps below to create additional priority values for campaigns and campaign activities.

Login

Self-Service Login URL (Forms)

Responsibility

Oracle Marketing Administrator

Steps

1. Click **Setups > Lookups**.

The Oracle Marketing Lookups dialog box appears.

2. In the Type field, search for **AMS_PRIORITY**.

   All current priority levels and respective values (1-100) appear.

3. In the provided fields, you can add entries for custom campaign or campaign activity priorities.

4. Click **Save**.

   > **Note:** You must enter a value in the Tag field for each list priority you define. Valid values are between 1 and 100, where 1 is highest and 100 is lowest priority.

Related Topics:

- Adding Subset Priority Values, page 8-3

Adding Subset Priority Values

Use the steps below to create additional priority values for Subsets.

Login

Self-Service Login URL (Forms)

Responsibility

Application Developer

Steps

1. Click **Application > Lookups > Application Object Library**.

   The Oracle Marketing Lookups dialog box appears.

2. In the Type field, search for **IEC_LIST_PRIORITY_TMP**.

   All current priority levels and respective values (1-100) appear.

3. In the provided fields, you can add entries for custom subset priorities.

4. Click **Save**.

   > **Note:** You must enter a value in the Tag field for each list priority you define. Valid values are between 1 and 100, where 1 is highest and 100 is lowest priority.

Setting the Positive Flag for Outcome and Result Codes

Use the steps below to set the positive flag for outcome and result codes.

Login

Self-Service Login URL (Forms)

Responsibility

Oracle Interaction History JSP Admin

Steps

1. Click **CRM Foundation > Interaction History > Configuration**.

2. Click **Outcome** or **Result** (depending on the one for which you want to set the positive flag).

   The HTML Administration console opens in a separate browser page, displaying a list of values for Outcomes or Result (depending on what you selected in the previous step).

3. Use the **First**, **Next**, **Previous**, or **Last** hyperlinks to scroll through the list of returned values.

4. In the ID column corresponding to the outcome or result value for which you want to set the positive flag, click the hyperlinked number.

   The Edit Outcome or Edit Result page appears, depending on whether you selected outcomes or results.

5. Click the Positive Outcome or Positive Result flag checkbox.

6. Click **Update**.

7. Repeat these steps for each value you want to be set to positive.