Oracle® Interaction Blending

Implementation Guide

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Part No. E49098-01

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- Are the implementation steps correct and complete?
- Did you understand the context of the procedures?
- Did you find any errors in the information?
- Does the structure of the information help you with your tasks?
- Do you need different information or graphics? If so, where, and in what format?
- Are the examples correct? Do you need more examples?

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Note: Before sending us your comments, you might like to check that you have the latest version of the document and if any concerns are already addressed. To do this, access the new Oracle E-Business Suite Release Online Documentation CD available on My Oracle Support and www.oracle.com. It contains the most current Documentation Library plus all documents revised or released recently.

Send your comments to us using the electronic mail address: appsdoc_us@oracle.com

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Preface

Intended Audience

Welcome to Release 12.2 of the *Oracle Interaction Blending Implementation Guide.*

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

- The principles and customary practices of your business area
- Oracle Interaction Blending
- Oracle Applications
- 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 viii for more Oracle E-Business Suite product information.

Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc.

Access to Oracle Support

Oracle customers have access to electronic support through My Oracle Support. For information, visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info or visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs if you are hearing impaired.

Structure

1 Introduction
2 Dependencies and Integration Points
3 Implementation Tasks
4 Administration Tasks
5 Profile Options
6 Server Parameters

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.

You can navigate to the Oracle Integration Repository through Oracle E-Business Suite Integrated SOA Gateway.

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 Advanced Inbound Telephony Implementation Guide

Oracle Advanced Inbound Telephony enables telesales and teleservice agents and collectors to route, queue, and distribute callbacks for customer calls received over the phone and the web. It enables computer telephony integration to third-party telephony platforms. You can also transfer or conference a call and its application data from one agent to another.

Oracle Advanced Outbound Telephony Implementation Guide

Oracle Advanced Outbound Telephony provides multiple automated dialing methods and extensive list management controls that improve the penetration and efficiency of outbound calling campaigns and maximize the productivity of interaction center agents. It integrates with Oracle Customer Interaction History to provide feedback that marketing professionals can use to analyze and measure the success of the marketing campaign.

Oracle Diagnostics Framework User's Guide

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

Oracle E-Business Suite 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 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 Universal Work Queue Implementation Guide

Oracle Universal Work Queue supports queued, prioritized distribution and delivery of work, and work methods. It enables agents to access application work from a queue, initiate their real-time session and connect with their assigned media providers. It supplements Oracle Interaction History information to create a complete picture of agents' sessions. This guide describes how to implement Oracle Universal Work Queue and integrate with Oracle E-Business Suite applications.

Oracle Interaction Center Server Manager Implementation Guide

Oracle Interaction Center Server Manager is the Java server process that runs on every Oracle Interaction Center machine. It enables you to balance load by creating server groups and configuring multiple server processes for them or assign servers to a standby system of nodes that you create by installing and running Oracle Interaction Center Server Manager on computers. You can add IP addresses to a node, refresh parameters of servers and server groups while the server is working, and use the Unit Test Server utility to test the validity of the CTI and switch integration. This guide also describes how to diagnose and troubleshoot operational issues.

Installation and System Administration

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 12.2, or contemplating significant changes to a configuration. After describing the Oracle E-Business Suite architecture and technology stack, it focuses on strategic topics, giving a broad outline of the actions needed to achieve a particular goal, plus the installation and configuration choices that may be available.

Oracle E-Business Suite CRM System Administrator's Guide

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

Oracle E-Business Suite Developer's Guide

This guide contains the coding standards followed by the Oracle E-Business Suite development staff. It describes the Oracle Application Object Library components needed to implement the Oracle E-Business Suite user interface described in the *Oracle E-Business Suite User Interface Standards for Forms-Based Products*. It also provides information to help you build your custom Oracle Forms Developer forms so that they integrate with Oracle E-Business Suite. In addition, this guide has information for customizations in features such as concurrent programs, flexfields, messages, and logging.

Oracle E-Business Suite Installation Guide: Using Rapid Install

This book is intended for use by anyone who is responsible for installing or upgrading Oracle E-Business Suite. It provides instructions for running Rapid Install either to carry out a fresh installation of Oracle E-Business Suite Release 12.2, or as part of an upgrade to Release 12.2.

Oracle E-Business Suite Maintenance Guide

This guide contains information about the strategies, tasks, and troubleshooting activities that can be used to help ensure an Oracle E-Business Suite system keeps running smoothly, together with a comprehensive description of the relevant tools and utilities. It also describes how to patch a system, with recommendations for optimizing typical patching operations and reducing downtime.

Oracle E-Business Suite Security Guide

This guide contains information on a comprehensive range of security-related topics, including access control, user management, function security, data security, and auditing. It also describes how Oracle E-Business Suite can be integrated into a single sign-on environment.

Oracle E-Business Suite Setup Guide

This guide contains information on system configuration tasks that are carried out either after installation or whenever there is a significant change to the system. The activities described include defining concurrent programs and managers, enabling Oracle Applications Manager features, and setting up printers and online help.

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.

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

This chapter covers the following topics:

- Oracle Interaction Blending Overview

Oracle Interaction Blending Overview

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

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

Service Plan

Service plans specify the desired level of service for a particular time of day. You can set service levels for one or more days of the week (for example, Monday, weekdays, or weekends). You can also set service levels for a specific date (such as, a holiday or the first day of a marketing campaign), referred to as an exception date. Service levels set for an exception date override the service set for the day.

Inbound service plans are applied to one or more inbound contact channels (classifications). Outbound service plans are applied to one or more outbound contact channels (campaigns). Service plans are also applied to a specific media type (for example, Web callbacks). Oracle Interaction Blending server delivers media to agents assigned to the contact channels according to the service levels set in the service plan.

You can create as many service plans as are required to accommodate the activities in your interaction center. For example, if you create separate inbound service plans for different classifications, then agents will be moved between classifications based on the service levels set in the service plans. If you create inbound and outbound service plans, then agents will be moved between classifications and campaigns based on the service levels set in the service plans. Service plans are shared among the Oracle Interaction

Blending servers.

Use the Oracle Interaction Blending administration console to set up service plans.

Regional Service Plans

Regional service plans are used to apply a different service plan to local sites in a multi-site interaction center. Regional plans are created within a service plan and assigned to the server group for the local site.

Service Level

Service levels define the goals for servicing contact channels and are assigned to time intervals in a service plan.

Full-service level blending for inbound telephony is not supported because Oracle Advanced Inbound Telephony no longer supports active mode call routing. Full-service level blending remains available for both outbound campaigns and for inbound Web callback, which use Oracle Advanced Inbound Telephony routing.

There are two types of service levels: inbound and outbound. Inbound service levels specify the percentage of inbound contacts to be serviced within a time threshold (for example, 80% of the inbound calls to be answered within 60 seconds) and the maximum wait time. Outbound service levels specify the number of outbound contacts to be serviced within a time period (for example, 200 transactions). Each type of service level indicates a minimum number agents to be available for contact when meeting the service level.

Oracle Interaction Blending first assigns the minimum number of agents and then, the number of agents required to meet the service level. For inbound service levels, calls that are not handled with the service threshold are recommended to an available agent before the end of the maximum wait time.

Inbound Service Level Example

Answer 80% of all calls in 30 seconds. No one (of the 20% who were not answered within 30 seconds) should wait more than two minutes. Always keep one agent ready for an inbound contact.

- 80% in 30 seconds.
- Maximum wait time: 120 seconds.
- Minimum Agents: 1

Outbound Service Level Example

Attempt 550 contacts per hour. Always keep five agents calling.

- Hourly Rate: 550
- Minimum Agents: 5

2

Dependencies and Integration Points

This chapter covers the following topics:

- Mandatory Dependencies
- Installing Oracle Interaction Blending
- Accessing Oracle Interaction Blending

Mandatory Dependencies

Mandatory dependencies are required in order for Oracle Interaction Blending to function. Oracle Interaction Blending relies on several products for data and functionality. The following products must be installed and implemented before you begin the implementation of Oracle Interaction Blending.

Oracle Advanced Inbound Telephony

Oracle Interaction Blending delivers inbound telephony and web callbacks to agents according to the service levels set in inbound service plans.

For information about managing server groups, see *Oracle Interaction Center Server Manager Implementation Guide*. For information about setting up inbound telephony and web callbacks, see *Oracle Advanced Inbound Telephony Implementation Guide*.

Oracle Advanced Outbound Telephony

Oracle Interaction Blending delivers outbound telephony to agents according to the service levels set in outbound service plans.

For information about setting up outbound telephony, see *Oracle Advanced Outbound Telephony Implementation Guide*.

Oracle Universal Work Queue

Agents access blended media from a Blended node in the Oracle Universal Work Queue work selector.

For information about Oracle Universal Work Queue, see *Oracle Universal Work Queue Implementation Guide*.

Installing Oracle Interaction Blending

You install Oracle Interaction Blending 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.

The Rapid Install is provided on CD-ROMs and is available from Oracle Store at http://oraclestore.oracle.com. For information about installing Oracle Applications using Rapid Install, see *Oracle E-Business Suite Installation Guide: Using Rapid Install*. For information about upgrading Oracle Applications using Rapid Install, see *Oracle E-Business Suite Upgrade Guide: Release 11i to Release 12*.

Accessing Oracle Interaction Blending

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 E-Business Home Page URL or the CRM Home page URL.

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

- To navigate to the E-Business Home Page URL, choose **Apps Logon Links** > **E-Business 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
```

E-Business 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 E-Business Home Page. You can access Forms-based or HTML-based applications from the Personal Home Page.

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

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 E-Business Home Page or CRM Home Page 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 Interaction Blending.

Responsibility	Function	Interface
Call Center HTML Administration	Access the administration console: • Create service levels • Create service plans	E-Business Home Page or CRM Home Page
System Administrator	Create a user for administering Oracle Interaction Blending. Set values for profile options.	E-Business Home Page or CRM Home Page

In the E-Business Home Page, after the user signs on, a list of available responsibilities appears. To switch responsibilities in the E-Business Home Page, click a responsibility. To switch responsibilities in the Forms interface, choose Switch Responsibility from the File menu.

In the CRM Home Page, after the user signs on, the user must select a default responsibility (even if the user has only one responsibility). The next time the 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.

3

Implementation Tasks

This chapter covers the following topics:

- Implementation Task Sequence
- Defining an Administrator

Implementation Task Sequence

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

Step	Required	Description	Responsibility
1	Yes	**Create an Oracle Interaction Blending administrator.** You will use this user account to perform the remaining steps.	System Administrator

Step	Required	Description	Responsibility
2	Yes, for inbound service plans	**For inbound service plans, create inbound contact channels (classifications).** Contact channels are assigned to service plans. See: *Oracle Advanced Inbound Telephony Implementation Guide*	Call Center HTML Administration
3	Yes, for outbound service plans	**For outbound service plans, create outbound contact channels (campaigns).** Contact channels are assigned to service plans. See: *Oracle Advanced Outbound Telephony Implementation Guide*	Call Center HTML Administration
4	Yes	**Add an Interaction Blending server to an interaction center server group.** See: *Oracle Interaction Center Server Manager Implementation Guide*	Call Center HTML Administration
5	Yes	**Create service levels.**	Call Center HTML Administration
6	Yes	**Create a service plan.**	Call Center HTML Administration
7	No	**Add a regional plan to the service plan.**	Call Center HTML Administration

Step	Required	Description	Responsibility
8	Yes	**Configure Oracle Universal Work Queue profile options for Oracle Interaction Blending.**	System Administrator

Defining an Administrator

Use the following procedure to create a user account for administering Oracle Interaction Blending.

Login

E-Business Home Page

Responsibility

System Administrator

Prerequisites

None

Steps:

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

   The User window appears.

   Use the following guidelines to define Oracle Applications user names:

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

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

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

Use the following guidelines to define Oracle Applications passwords:

- Use at least five characters and no more than 100 characters.
- Use only alphanumeric characters ('A' through 'Z', and '0' through '9').

3. In the Password field, enter the password for the user account and then press Tab.

   The cursor remains in the Password field.

4. Enter the password again to verify it.

5. If you want to use this account to submit concurrent programs for Oracle Interaction Blending, then select an employee to associate with this user account from the Person field.

6. In the Responsibilities tab, add the following responsibilities:

Responsibility	Function	Interface
Call Center HTML Administration	Access the administration console: • Create service levels • Create service plans	E-Business Home Page or CRM Home Page
System Administrator	Create a user for administering Oracle Interaction Blending. Set values for profile options.	E-Business Home Page or CRM Home Page

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

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

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

   You may close the Users window.

4

Administration Tasks

This chapter covers the following topics:

- Interaction Blending Service Levels
- Interaction Blending Service Plans

Interaction Blending Service Levels

Use the Service Levels subtab to manage service levels for inbound and outbound contact channels.

Creating an Inbound Service Level:

Use this procedure to define a level of service for inbound contact channels. Inbound service levels can be associated with time intervals in inbound service plans.

Login

Oracle HTML Applications

Responsibility

Call Center HTML Administration

Prerequisites

None

Steps

1. Click the Blending tab.

   The Service Plans page appears.

2. Click the Service Levels subtab.

   The Service Levels page appears.

3. Click **Create Service Level.**

   The Create Service Level page appears.

4. In the Service Level Name field, type a unique name for the service level.

   You cannot change this field after the service level is saved.

5. Optionally, in the Service Level Description field, type a description of the service level.

   You cannot change this field after the service level is saved.

6. In the Direction field, select **Inbound**.

7. Click **Continue**.

8. In the Service Goal Percentages fields, define the target rate for handling inbound contacts (for example, answering 80% of calls within 20 second).

   The percentage must be a positive integer between 0 and 100. Fractions and decimals are not allowed.

9. In the Max Wait Time field, enter the maximum time in seconds that an inbound contact will wait in a queue before being handled.

   The maximum wait time must be greater than or equal to the handle time.

10. In the Minimum Agents field, enter the minimum number of agents that must be available to receive inbound contact when meeting this service level.

    The minimum number of agents must be equal to or greater than zero.

11. Click **Submit**.

Creating an Outbound Service Level:

Use this procedure to define a level of service for outbound contact channels. Outbound service levels can be associated with time intervals in outbound service plans.

Login

Oracle HTML Applications

Responsibility

Call Center HTML Administration

Prerequisites

None

Steps

1. Click the Blending tab.

   The Service Plans page appears.

2. Click the Service Levels subtab.

   The Service Levels page appears.

3. Click **Create Service Level.**

   The Create Service Level page appears.

4. In the Service Level Name field, type a unique name for the service level.

   You cannot change this field after the service level is saved.

5. Optionally, in the Service Level Description field, type a description of the blending service level.

   You cannot change this field after the service level is saved.

6. In the Direction field, select **Outbound**.

7. Click **Continue**.

8. In the Hourly Rate field, enter the target number of outbound contact attempts in a hour.

9. In the Minimum Agents field, enter the minimum number of agents that must be available to attempt outbound contact when meeting this service level.

   The minimum number of agents must be equal to or greater than zero.

10. Click **Submit**.

Updating a Service Level:

> **Important:** Modifications to service levels are applied to the current session of Oracle Interaction Blending and will affect the service plans to which the service levels have been assigned.

Use this procedure to update a service level.

Login

Oracle HTML Applications

Responsibility

Call Center HTML Administration

Prerequisites

None

Steps

1. Click the Blending tab.

   The Service Plans page appears.

2. Click the Service Levels subtab.

   The Service Levels page appears.

3. Click a Service Level Name hyperlink.

   The Service Level Details page appears.

4. Modify the appropriate fields.

5. Click **Apply**.

Removing a Service Level:

Use this procedure to delete a user-defined service level. You cannot delete seeded service levels or service levels that have been assigned to a service plan. On the Service Levels page, a seeded service level has one asterisk in the Remove column and an assigned service level has two asterisks in the Remove column.

Login

Oracle HTML Applications

Responsibility

Call Center HTML Administration

Prerequisites

If the service level is assigned to a service plan, then you must first disassociate the service level from the service plan.

Steps

1. Click the Blending tab.

   The Service Plans page appears.

2. Select the Service Levels subtab.

   The Service Levels page appears.

3. Select the Remove box for the service level that you want to delete.

4. Click **Apply**.

   The service level is removed from the list and the Service Levels page refreshes.

Interaction Blending Service Plans

Use the Service Plans subtab to manage service plans for inbound and outbound contact.

Creating an Inbound Service Plan:

Use this procedure to create a service plan for inbound contact.

Login

Oracle HTML Applications

Responsibility

Call Center HTML Administration

Prerequisites

None

Steps

1. Click the Blending tab.

   The Service Plans page appears.

2. Click **Create Service Plan.**

   The Create Service Plan page appears.

3. In the Service Plan Name field, type a unique name for the service plan.

   You cannot change this field after the service plan is saved.

4. Optionally, in the Service Plan Description field, type a description of the service plan.

   You cannot change this field after the service plan is saved.

5. In the Direction field, select **Inbound**.

   You cannot change this field after the service plan is saved.

6. In the Media Type field, select **Web Callback**.

   You cannot change this field after the service plan is saved.

7. If you want to copy the service level assignment for an existing, user-defined, service plan, then select a service plan from the Select Template Service Plan list.

   This feature copies service level assignments only. It does not copy contact channel assignment or regional service plans.

8. Click **Continue**.

   The Create Service Plan Details page appears. By default, the seeded service level, Medium-In, is assigned to all days and times.

9. To assign service levels for a day of the week, do the following:

   1. In the Set Daily Range area, select one or more days.

   2. In the Time Range field, select a start and end time of the time interval to which the service level will be assigned.

   3. From the Level of Service list, select a service level and then click **Set**.

      The week view displays the assigned service level.

   4. To assign additional service levels, select a time range and service level, and then click **Set**.

10. To assign service levels for an exception date, do the following:

    1. In the Specific/Exception Dates area, in the Add field, type or select a date.

    2. In the Time Range field, select a start and end time of the time interval to which the service level will be assigned.

3. From the Level of Service list, select a service level and then click **Set**.

   A day view appears with the assigned service levels.

11. Click **Continue**.

    The Create Service Plan Assignment page appears.

12. Assign inbound contact channels to the service plan.

13. Click **Submit**.

Creating an Outbound Service Plan:

Use this procedure to create a service plan for outbound contact.

Login

Oracle HTML Applications

Responsibility

Call Center HTML Administration

Prerequisites

None

Steps

1. Click the Blending tab.

   The Service Plans page appears.

2. Click **Create Service Plan.**

   The Create Service Plan page appears.

3. In the Service Plan Name field, type a unique name for the service plan.

   You cannot change this field after the service plan is saved.

4. Optionally, in the Service Plan Description field, type a description of the service plan.

   You cannot change this field after the service plan is saved.

5. In the Direction field, select **Outbound**.

   You cannot change this field after the service plan is saved.

6. In the Media Type field, select **Advanced Outbound Telephony**.

   You cannot change this field after the service plan is saved.

7. If you want to copy the service level assignment for an existing, user-defined, service plan, then select a service plan from the Select Template Service Plan list.

   This feature copies service level assignments only. It does not copy contact channel assignment or regional service plans.

8. Click **Continue**.

   The Create Service Plan Details page appears. By default, the seeded service level, Medium-Out, is assigned to all days and times.

9. To assign service levels for a day of the week, do the following:
   1. In the Set Daily Range area, select one or more days.
   2. In the Time Range field, select a start and end time of the time interval to which the service level will be assigned.
   3. From the Level of Service list, select a service level and then click **Set**.

      The week view displays the assigned service level.
   4. To assign additional service levels, select a time range and service level, and then click **Set**.

10. To assign service levels for an exception date, do the following:
    1. In the Specific/Exception Dates area, in the Add field, type or select a date.
    2. In the Time Range field, select a start and end time of the time interval to which the service level will be assigned.
    3. From the Level of Service list, select a service level and then click **Set**.

       A day view appears with the assigned service levels. .

11. Click **Continue**.

    The Create Service Plan Assignment page appears.

12. Assign outbound contact channels to the service plan.

13. Click **Submit**.

Updating Service Level Assignments:

Use this procedure to update the assignment of service levels to a service plan.

Login

Oracle HTML Applications

Responsibility

Call Center HTML Administration

Prerequisites

None

Steps

1. Click the Blending tab.

   The Service Plans page appears.

2. Click a Service Plan Name hyperlink.

   The Service Plan Overview page appears.

3. In the side panel, click **Service Plan Details**.

4. Modify the service level assignments.

5. Click **Apply**.

Updating a Contact Channel Assignments:

Use this procedure to update the assignment of contact channels to a service plan.

Login

Oracle HTML Applications

Responsibility

Call Center HTML Administration

Prerequisites

None

Steps

1. Click the Blending tab.

   The Service Plans page appears.

2. Click a Service Plan Name hyperlink.

   The Service Plan Overview page appears.

3. Modify the contact channel assignments.

4. Click **Apply**.

Adding a Plan Exception:

Use this procedure to add a date exception to a service plan.

Login

Oracle HTML Applications

Responsibility

Call Center HTML Administration

Prerequisites

None

Steps

1. Click the Blending tab.

   The Service Plans page appears.

2. Click a Service Plan Name hyperlink.

   The Service Plan Overview page appears.

3. In the side panel, click **Service Plan Details**.

4. In the Specific/Exception Dates area, in the Add field, type or select a date.

5. In the Time Range field, select a start and end time of the time interval to which the service level will be assigned.

6. From the Level of Service list, select a service level and then click **Set**.

A day view appears with the assigned service levels.

7. Click **Apply**.

   The Service Plan Details page refreshes.

8. In the Specific/Exception Dates area, from the Select list, select the exception date.

9. To assign additional service levels to the exception date, repeat the following steps:

   1. In the Time Range field, select a start and end time of the time interval to which the service level will be assigned.

   2. From the Level of Service list, select a service level and then click **Set**.

10. Click **Apply**.

Updating a Plan Exception:

Use this procedure to update a date exception to a service plan.

Login

Oracle HTML Applications

Responsibility

Call Center HTML Administration

Prerequisites

None

Steps

1. Click the Blending tab.

   The Service Plans page appears.

2. Click a Service Plan Name hyperlink.

   The Service Plan Overview page appears.

3. In the side panel, click **Service Plan Details**.

4. In the Specific/Exception Dates area, from the Select list, select the exception date.

   A day view appears with the assigned service levels.

5. To update the service level assignments, repeat the following steps:
    1. In the Time Range field, select a start and end time of the time interval to which the service level will be assigned.
    2. From the Level of Service list, select a service level and then click Set.
6. Click **Apply**.

Removing a Service Plan:

Use this procedure to delete a user-defined service plan. You cannot delete seeded service plans or service plans with assigned contact channels. On the Service Plans page, a seeded service plan has one asterisk in the Remove column and a service plan with assigned contact channels has two asterisks.

Login

Oracle HTML Applications

Responsibility

Call Center HTML Administration

Prerequisites

If a contact channel is assigned to the service plan, then you must first disassociate the contact channel from the service plan.

Steps

1. Click the Blending tab.

   The Service Plans page appears.
2. Select the Remove box for the service plan that you want to delete.
3. Click **Apply**.

   The service plan is removed from the list and the Service Plans page refreshes.

Adding a Regional Plan:

Use this procedure to add a regional plan for one or more local sites in a multi-site interaction center.

Login

Oracle HTML Applications

Responsibility

Call Center HTML Administration

Prerequisites

Create a service plan.

Create a local server group for a multi-site interaction center.

Steps

1. Click the Blending tab.

   The Service Plans page appears.

2. Click a Service Plan Name hyperlink.

   The Service Plan Overview page appears.

3. In the side panel, click **Regional Plans**.

   The Regional Plans page appears.

4. Click **Create Regional Plan**.

   The Create Regional Plan page appears.

5. In the Regional Plan Name field, type a unique name for the regional plan.

   You cannot change this field after the service plan is saved.

6. Optionally, in the Description field, type a description of the regional plan.

   You cannot change this field after the service plan is saved.

7. Click **Continue**.

   The Create Regional Plan Details page appears.

8. In the Set Daily Range field, select the days that make up the date range for the regional plan.

9. In the Specific/Exception Dates fields add or select the days that define the exception to the contact period.

10. In the Time Range field, enter the start and end time for the regional plan.
11. In the Level of Service field, select the service level for the plan.
12. Click **Set**.
13. Click **Continue**.

    The Group Assignment page appears.
14. In the Available Groups column, select the group or groups that you want to assign to the service plan.
15. Click **Submit**.

Updating a Regional Plan:

Use this procedure to update a regional plan.

Login

Oracle HTML Applications

Responsibility

Call Center HTML Administration

Prerequisites

None

Steps

1. Click the Blending tab.

   The Service Plans page appears.
2. In the Regional Customization column, select a regional plan and then click **Go**.

   The Regional Plan Details page appears.
3. To update the service level assignments, click the Regional Plan Details hyperlink in the side panel.
4. To update the local server group assignments, click the Group Assignments hyperlink in the side panel.
5. To save you changes, click **Apply**.

Removing a Regional Plan:

Use this procedure to delete a regional plan.

Login

Oracle HTML Applications

Responsibility

Call Center HTML Administration

Prerequisites

None

Steps

1. Click the Blending tab.

   The Service Plans page appears.

2. Click a Service Plan Name hyperlink.

   The Service Plan Overview page appears.

3. In the side panel, click **Regional Plans**.

   The Regional Plans page appears.

4. Click the Remove box for the regional plan that you want to delete.

5. Click **Apply**.

5

Profile Options

This chapter covers the following topics:

- Setting System Profile Options
- Blending Profile Options

Setting System Profile Options

Oracle Applications establishes a value for user profile options when a user signs on or changes responsibility. Use this procedure to view or set a profile option value.

Login

E-Business Home Page

Responsibility

System Administrator

Prerequisites

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

Steps

1. In the Navigator window, on the Functions tab, choose **Profile** >**System**.

   The Find System Profile Values window appears. The Site and Profile with No Values boxes are selected by default.

2. Select the level at which you want to view or set the profile option value. You have the following options:

Level	Description
Site	View or set profile option values for all users.
Application	View or set profile option values for users working under responsibilities owned by a specific application. Select an application from the list.
Responsibility	View or set profile option values for users working under a specific responsibility. Select a responsibility from the list.
User	View or set profile option values for a specific user. Select the username from the list.

3. If you want to display profile options both with and without values, select the Profiles with No Values box.

4. If you want to display profile options that include a specific character string, enter the string 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%.

5. Click **Find**.

   The System Profile Values window appears.

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

   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, choose **Save**.

   Your changes take effect as soon as users sign on or change responsibility.

Blending Profile Options

Each profile option description includes the following information:

- **Required:** Indicates whether a profile option value is required.
- **Profile Levels:** There are two levels for which profile options can be set, personal and system.
  - **Personal Profile Levels:** Indicates whether a user can view or update the profile option. Oracle Applications users with the Preferences responsibility may use the Personal Profile Values window to set their own personal profile options at the user level. Not all profile options are visible to users and some profile options, while visible, may not be updated by users.
  - **System Profile Levels:** Indicates the levels at which a particular profile option can be set. System administrators can set profile options at the site, application, responsibility, and user levels. Not all profile options have settings at all levels.
- **Profile Settings:** Lists available values, a description of each value, and any usage considerations.
- **Default Value:** Indicates the default profile option value if no value has been set. Depending on the how the profile option is used in the application, the default may be a predefined value or it may be determined dynamically at runtime.

Profile options include:

IEU: Blending Style

This profile option applies to media work.

Use this Oracle Universal Work Queue profile option to enable media work blending. A Blended node appears in the Universal Work Queue work selector. When an agent requests work from the Blended node, Oracle Interaction Blending delivers the media type for which the agent is enabled as per the service levels set for the service plan.

Required

No

Personal Profile Levels

Update	View
Yes	No

System Profile Levels

Site	Application	Responsibility	User
Yes	Yes	Yes	Yes

Profile Settings

Setting	Description
Full Forced Blended	Enables the blending of media work for outbound telephony and Web callbacks. A Blended node appears in the Universal Work Queue work selector. Specific media nodes (e.g., Inbound and Outbound) are not available.
Full Optional Blended	Enables the blending of media work for outbound telephony and Web callbacks. A Blended node appears in the Universal Work Queue work selector. Specific media nodes (for example, Inbound and Outbound) are also available.
Not Blended	Media work blending is not enabled.
Simple Forced Blended	Enables the blending of media work for passive inbound telephony. A Blended node appears in the Universal Work Queue work selector. Specific media nodes (for example, Inbound and Outbound) are not available.
Simple Optional Blended	Enables the blending of media work for passive inbound telephony. A Blended node appears in the Universal Work Queue work selector. Specific media nodes (for example, Inbound and Outbound) are also available.

Default Value

Not Blended

IEU: Blending: Timeout

This profile option applies to media work.

In simple blending mode, blending occurs by first looking for an inbound record and then, if not found for an outbound record. The integer that is set in this profile determines the duration of time to look for an inbound or outbound record.

Use this Universal Work Queue profile to set the timeout value for simple blending.

Required

No

Personal Profile Levels

Update	View
No	No

System Profile Levels

Site	Application	Responsibility	User
Yes	Yes	Yes	Yes

Profile Settings

Enter a value in seconds to indicate the blending timeout threshold. For example, 60 to represent 60 seconds.

Default Value

No

IEU: Queue Order: Blended

This Universal Work Queue profile option is used to indicate the placement of the Blended node in the list of nodes on the Oracle Universal Work Queue window.

The Blended node appears in the Oracle Universal Work Queue window when the IEU: Blending Style profile option value is set to Full Forced Blended or Full Optional

Blended.

Use this Universal Work Queue profile to set the timeout value for simple blending.

Required

No

Personal Profile Levels

Update	View
Yes	No

System Profile Levels

Site	Application	Responsibility	User
Yes	Yes	Yes	Yes

Profile Settings

Choose a number to indicate the placement of the node in the list of nodes on the Oracle Interaction Blending window. Nodes are displayed in ascending order.

Default Value

Not Applicable

6

Server Parameters

This chapter covers the following topics:

- Introduction
- Interaction Blending Server Parameters
- Interaction Blending Advanced Server Settings

Introduction

This appendix describes the server parameters for Oracle Interaction Blending server. Database parameters override any command line parameters passed to the Oracle Interaction Blending server. Server parameters set in Call Center HTML Administration and stored in the Oracle Applications database.

For information, see *Oracle Interaction Center Server Manager Implementation Guide*.

Interaction Blending Server Parameters

Server parameters include:

Agent Migration Dampening Factor

The migration dampening factor adds weight to an agent's currently "assigned" work queue. It has been programmatically tuned for most effective interoperability with the Advanced Outbound dialing algorithm and should not be adjusted except for simplistic testing of blending functionality of agent movement between work sources.

Type	Unit	Max Value	Min Value	Default
integer	0	N/A	N/A	

Note: The value for this parameter must be set to zero (0).

Agent Status Check Interval (Sec.)

Text.

Type	Unit	Max Value	Min Value	Default
integer	N/A	N/A	N/A	

Campaign Status Check Interval (Sec.)

Used to support the AO multi-list functionality. Blending polls the AO, (IEC_AGT_ASSN_PUB.GET_WB_ALL_AGENT_CPN_ASSNS) database procedure every 1 minute (by default) to detect agent availability on a per campaign basis.

Type	Unit	Max Value	Min Value	Default
integer	N/A	N/A	N/A	1 minute

DB Connection Status Check Interval (Sec.)

Text.

Type	Unit	Max Value	Min Value	Default
integer	N/A	N/A	N/A	

Service Category Calculation Interval (Sec.)

Type	Unit	Max Value	Min Value	Default
integer	N/A	N/A	N/A	

Interaction Blending Advanced Server Settings

Advanced server setting are used to facilitate logging and troubleshooting. Advanced server settings include:

Java Options

Use the Java Options field to modify the memory allocation for a server instance. For more information, see *Oracle Interaction Center Server Manager Implementation Guide*.

This represents a command line parameter that is used applications logging.

Type	Value
string	-DAFLOG_MODULE=ieb% -DAFLOG_ENABLED=TRUE -DAFLOG_LEVEL=STATEMENT

Server Arguments

Use the Server Arguments field to obtain greater detail in the log file.

Type	Value
string	-trace all -log

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