Oracle® Email Center

User Guide

Release 12.2

September 2015

ORACLE®

Oracle Email Center User Guide, Release 12.2

Part No. E49105-02

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Primary Author: Pooja Vijay Kumar

Contributor: Mable Yee, Ranjan Tripathy

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Send Us Your Comments

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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.

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Preface

Intended Audience

Welcome to Release 12.2 of the *Oracle Email Center User Guide.*

This guide is intended for interaction center agents who utilize email as a channel of communication.

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

- The principles and customary practices of your business area.

- Oracle Email Center.

- Oracle Forms, Self-Service Web Applications, and Oracle Applications Framework.

- The Oracle Applications graphical user interface.

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

See Related Information Sources on page 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 that have purchased support 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

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

Online Documentation

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

- **PDF** - See the Oracle E-Business Suite Documentation Library for current PDF documentation for your product with each release. The Oracle E-Business Suite Documentation Library is also available on My Oracle Support and is updated frequently

- **Online Help** - Online help patches (HTML) are available on My Oracle Support.

- **Release Notes** - For information about changes in this release, including new features, known issues, and other details, see the release notes for the relevant product, available on My Oracle Support.

- **Oracle Electronic Technical Reference Manual -** The Oracle Electronic Technical Reference Manual (eTRM) contains database diagrams and a detailed description of database tables, forms, reports, and programs for each Oracle E-Business Suite product. This information helps you convert data from your existing applications and integrate Oracle E-Business Suite data with non-Oracle applications, and write custom reports for Oracle E-Business Suite products. The Oracle eTRM is available on My Oracle Support.

Guides Related to All Products

Oracle E-Business Suite User's Guide

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

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

Guides Related to This Product

Oracle Email Center Implementation Guide

Oracle Email Center is a comprehensive solution for managing high volumes of inbound email. This guide describes how to set up separate accounts for emails from external and internal sources, create rules for predefined email processing rule types, enter keywords for email intent processing, create tags, and create queries to search for documents and templates in the integrated knowledge base repositories of Marketing Encyclopedia Systems (MES) and Oracle Knowledge Management.

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 Approvals Management Implementation Guide

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

Oracle Diagnostics Framework User's Guide

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

Oracle E-Business Suite Flexfields Guide

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

Oracle E-Business Suite Integrated SOA Gateway Implementation Guide

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

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

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

Oracle E-Business Suite Multiple Organizations Implementation Guide

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

levels and for different contexts. Reporting levels can be ledger or operating unit while reporting context is a named entity in the selected reporting level.

Oracle e-Commerce Gateway Implementation Guide

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

Oracle e-Commerce Gateway User's Guide

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

Oracle iSetup User's Guide

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

Oracle Product Hub Implementation Guide

This guide explains how to set up hierarchies of items using catalogs and catalog categories and then to create user-defined attributes to capture all of the detailed information (such as cost information) about an object (such as an item or change order). It also explains how to set up optional features used in specific business cases; choose which features meet your business' needs. Finally, the guide explains the set up steps required to link to third party and legacy applications, then synchronize and enrich the data in a master product information repository.

Oracle Product Hub User's Guide

This guide explains how to centrally manage item information across an enterprise, focusing on product data consolidation and quality. The item information managed includes item attributes, categorization, organizations, suppliers, multilevel structures/bills of material, packaging, changes, attachments, and reporting.

Oracle Web Applications Desktop Integrator Implementation and Administration Guide

Oracle Web Applications Desktop Integrator brings Oracle E-Business Suite functionality to a spreadsheet, where familiar data entry and modeling techniques can be used to complete Oracle E-Business Suite tasks. You can create formatted spreadsheets on your desktop that allow you to download, view, edit, and create Oracle

E-Business Suite data, which you can then upload. This guide describes how to implement Oracle Web Applications Desktop Integrator and how to define mappings, layouts, style sheets, and other setup options.

Oracle Workflow Administrator's Guide

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

Oracle Workflow Developer's Guide

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

Oracle Workflow User's Guide

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

Oracle XML Gateway User's Guide

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

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

Oracle XML Publisher Administration and Developer's Guide

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

Oracle XML Publisher Report Designer's Guide

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

Training and Support

Training

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

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

Support

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

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

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

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

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

may change a row in one table without making corresponding changes in related tables. If your tables get out of synchronization with each other, you risk retrieving erroneous information and you risk unpredictable results throughout Oracle E-Business Suite.

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

1

Understanding Oracle Email Center

This chapter covers the following topics:

- Oracle Email Center Concepts

Oracle Email Center Concepts

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

Topics include:

- Agent Console, page 1-2

- Auto Acknowledgement, page 1-3

- Queue Access, page 1-3

- Classifications, page 1-3

- Customer Matching/Searching, page 1-4

- Default Customer, page 1-5

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- My Inbox, page 1-8

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- Spell Checker, page 1-9

- Suggested Response Documents and Templates, page 1-10

- Using Email Center Editors, page 1-10

- Work Activity, page 1-11

Agent Console

The Email Center Agent Console is an HTML application that allows agents to respond to inbound emails and compose outbound emails using a system of generated suggested responses and to compose original outbound email messages using standard templates.

The following features are available for agents to assist with the processing of email responses:

- The Home page displays the email accounts assigned to the agent and the classifications for each of the accounts. The agent can then acquire the next email work item from any classification queue. Following the "First-In-First-Out" protocol, the oldest email in that queue will be delivered to the agent. The Inbox Summary section displays the number of emails fetched by the agent that have not yet been resolved. The Activity container provides a summary of transactions performed by the Agent for a selected duration (day, week or since the last login). The Break container enables the Agent to go on a break and notify the system of the reason.

- Customer information is presented to the agent automatically. In the event that a matching customer is not found, Email Center provides the ability to search the customer database and select a customer to associate with the interaction.

- Every action performed by the agent using the Agent Console is logged in the customer's unified Customer Interaction History.

- The calendar tab exposes the Foundation calendar functionality.

The Email Center Agent Console also provides the ability to search for historical messages. These are either inbound messages that were replied to or deleted or outbound messages that were sent. Using the same functionality agents can also search

their inboxes.

All interactions are now recorded by Email Center. When an agent is finished with a message, whether sending, deleting, or transferring, the interaction details (interactions, activities, media items, and media item lifecycle segments) and outcomes are recorded to Customer Interaction History.

The JTF Calendar functionality is also included in the Email Center Agent Console which allows agents to schedule reminders or lookup important dates.

Auto Acknowledgement and Auto-Reply

Oracle Email Center considers an Auto Acknowledgement as a confirmation email that will be sent for every incoming email received by an email account. These emails simply confirm receipt of the incoming email and may provide some indication of when the customer can expect a response from an agent.

On the other hand, an Auto-Reply is an email that is sent automatically in response to a customer's inquiry.

Queue Access

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

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

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

Classifications

Oracle Email Center can categorize or classify emails into different queues based on administrator defined rules. The administrator can create a rule using either a combination of provided keys or the output of a custom PL/SQL procedure. These keys pertain to the email, such as account name, senders name, intent, received date, and system information such as current day and time. Classifications enable the distribution of emails into multiple queues which could also relate to the prioritization of emails. When a Classification is associated with an email account, a folder bearing the name of the classification is created for that email account. By default an "Unclassified" folder is created for every account to hold emails that do not satisfy any classification rules.

Customer Matching/Searching

Oracle Email Center has extended the search for matching customer records to include Parties of type Person, Organization, and Relationship.

Customers and Contacts created by the business application can be easily selected by the Email Center processing engine and/or agent console. Details of the specific Oracle Email Center changes relating to Customers are below:

1. **Oracle Email Center Server Processing - Customer Lookup**

   The process for finding matching customers based on email address is initiated by the Oracle Email Center server processing. Matching customer records based on an email address can result in one of the three scenarios listed below:

   Scenario 1 - A single matching customer record found

   Scenario 2 - Multiple matching customer records found

   Scenario 3 - No matching customer records found

   An attempt is made to identify the customer and contact for each incoming email message. This attempt is performed using the email address and searches for the customer in the customer database. If the customer is identified, the customer and contact records are shown on the Reply page. If there are multiple customer records found for the address, a message with a link is displayed and by clicking the link you can identify which customer and contact to use for this interaction. If the email address was not found in the customer database, Email Center uses the default customer, but if there is sufficient information in the inbound message, you can use the Customer search to identify the customer. For all future interactions with the customer related to this thread, the customer and contact ID tags appended to the email message will be used to identify the customer rather than the email address.

2. **Oracle Email Center Agent Console/Message Component - Customer Search**

   Oracle Email Center allows you to search for customers on the following criteria:

   - Customer name - Search only parties matching the customer name entered.

   - Last Name or First Name - Search only parties matching the last/first name entered.

   - Email Address - Search parties who have an "email" contact point that matches the email address entered.

   - Customer Number - Search parties whose customer number matches the number entered.

   - Customer ID - Search parties whose customer ID matches the ID number entered.

> **Note:** Oracle Email Center only searches for "CONTACT_OF" or "EMPLOYEE_OF" type of relationships by default. To view other types of relationships, search for one of the parties involved and then navigate to the Overview page by clicking on the name of the selected party.

> **Tip:** Utilizing textual searches, such as name or email address, is more effecient, since they can be matched partially.

3. **Recording Interactions**

   The interaction is always recorded against the Customer. If the system processing could not find a matching customer, the agent is prompted to search for and select a customer for recording the interaction. However, if the agent wishes not to, then the "default" customer (created during the setup phase by the administrator) is selected. If an agent selects to use the default customer, the default customer information is not displayed on the Reply page.

Default Customer

To record an interaction, a customer must first be identified. In cases where the customer cannot be identified or does not exist, Oracle Email Center provides the concept of "default" customer. A default customer is a customer created by the Email Center administrator to be used in cases where no customer has been identified.

Download Processor

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

Email Tagging

Email tagging is the process of inserting a tag containing certain system data such as Interaction ID, Agent ID, Customer/Contact ID and other custom data into every outbound email and also extracting the same from the inbound email (customer's response).

Email Center uses the tag information extracted from incoming emails to perform certain automated functions such as route email to the same agent, thread or link the new interaction with the old one, and identify the customer. The custom tags are also available as keys for defining any processing rule.

Tagging will not work if the customer changes the subject line of the email when replying to the email. Doing this will remove the tags embedded in the subject line of the email.

Email Threading

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

Intents

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

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

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

Interaction Threading

Email Interaction Threading is the process of linking one email interaction to another such that a parent-child relationship is formed between the two interactions.

An "interaction" is created or generated when, an incoming email is received by the Email Center system or when an agent composes a new email. Linking the new interaction ID with the previous interaction ID is made possible by the feature called Email Tagging, page 1-5. This feature inserts a tag containing the interaction ID (along with other data) into every outbound email and also extracts the same from the inbound email (customer's response).

With interaction threading, each "parent" interaction can have more than one "child" interaction. However a "child" interaction can belong to one and only one parent

interaction.

The email interactions in a thread are displayed in chronological order, with the oldest email interaction in the thread on top.

Email Thread Example:

An agent composes a new email for a customer. An interaction ID of 1234 is assigned to that interaction and included in the tag inserted in the outbound email. When the customer responds to that email, the interaction ID from the email tag is extracted and stored. When the agent responds to the customers reply, a fresh interaction is created (9876). This interaction is then related to 1234 using the JTF_IH_INTERACTION_INTERS table. Now the customer responds again and this time the agent fetches the email and deletes it. However, this is still recorded as an interaction, ID is 7268. Now this interaction will be related to 9876 and hence indirectly related to 1234, thus forming an (email) interaction thread as show below.

Parent ID	Interaction ID	Activity	Media Item
	1234	Email Composed	Copy of outbound email
1234	9876	Email Responded	Inbound email
		Email Sent	Copy of outbound email
9876	7268	Email Deleted	Inbound email

Knowledge Base Repositories

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

Email Center is integrated with two knowledge base repositories: Marketing Encyclopedia Systems (MES) and Knowledge Management (previously known as SMS). Although both of the repositories can be searched for probable responses to an incoming email, you can only publish documents into MES. Solution sets can be created in knowledge management only via Oracle iSupport. Agents can browse through all of the categories in MES or search for documents in both MES and Knowledge Management, which contain specific keywords. Either one or both of the above repositories are scanned for probable responses when processing an incoming message. This is based on the site level profile set by the administrator.

Message Component

The Email Center Message Component is a module of Oracle Email Center that enables agents to view and reply to incoming emails as well as compose new outbound emails. This module also enables the integration of Email Center with other business applications by providing the above mentioned functionality to users of those integrated applications as well.

An agent can potentially work on multiple email interactions at the same time because a separate browser is launched every time the Email Center Message Component is invoked. The Message Component adds a new Responsibility "Email Center Message Component". The Email Center Message Component responsibility must be assigned to every agent who is required to view, respond to or compose emails using the Oracle Email Center Message Component.

The Message Component also provides access to the MES and Knowledge Management (formerly knows as SMS) repositories through the knowledge base tab. You can browse through the MES categories and search both Knowledge Management and MES for response documents and solution sets.

Outbound messages, whether original or replies can be created not only by inserting or attaching suggested responses or templates, but any document in the Knowledge Base. There is a search capability that allows agents to search for documents as well as the Marketing Encyclopedia System's (MES) category structure that can be browsed. The agent can also attach a document from the network or local file system using the Attachments link.

Agents can also use the rich-text editor to mark up documents with font changes, alignment, hyperlinks, and inline images.

My Inbox

"My Inbox" contains emails "owned" by an agent. The emails in the inbox could have either been acquired by the agent, automatically routed to the agent, assigned to the agent by the supervisor, or transferred to the agent by another agent. The emails remain in the inbox until the agent either responds to it, deletes it, reroutes it, or transfers it to another agent.

A message in your inbox cannot be accessed by other agents. If you want another agent to access a message you have fetched, you must transfer the message to the agent.

The My Inbox Summary container, on the Email Center Home tab, lists the accounts to which you are assigned to work and the count of the number of messages in your inbox account queues.

Notes

Email Center agents are provided with a menu of actions for handling email interactions. For example, an agent can compose/send a brand new email, transfer an

inbound email to another agent, reply to an inbound email or simply delete an inbound email. In doing so, agents may want to record a justification or explanation of their actions and make this information available to other agents or to their supervisors who may work on or review the email interaction at a later time

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

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

- Message Component - Reply Screen.

- Message Component - View Message (Read Only) Screen* - this is the screen that is accessed by supervisor when s/he clicks on the e-mail subject in the Supervisor Console's message summary screen.

- Customer's Interaction History - Customer Details screen.

- Interaction Threads screen.

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

The note type is based on what page you are currently on or on what action you are taking.

Spell Checker

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

Dictionaries for the following languages are available:

- American English

- Brazilian Portuguese

- British English

- Canadian English

- Danish

- Dutch

- English

- Finnish

- French

- German

- Italian

- Norwegian

- Portuguese

- Spanish

- Swedish

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

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

Suggested Response Documents and Templates

The Email Center system determines the intent of the message and identifies suitable responses for the message. Email Center automatically lists a selection of the potentially appropriate responses in the Top Suggested Response Documents container on the Reply page. You can choose one or more of the suggested response documents listed and customize an email response using a full feature editor. You can quickly and efficiently respond to inbound email messages by using suggested response documents to compose your email responses.

Templates can be viewed as boiler plate building blocks used to compose a new email. Template documents normally consist of a header including company logo and a footer. Templates can also contain generic information that may not be related to any specific type of problem or inquiry.

Text Editors

Oracle Email Center provides you with two types of editors - a plain text editor and a rich-text editor. A rich text editor enables you to format the font of the email, and include an image or hyperlink in the email. You should use the "Rich Text" editor for all HTML documents. You, can switch from one editor to another by clicking on the link

provided above the text box. By default the plain text editor will be displayed. However if the you want to make the "Rich Text" editor the default, you can do so by setting the corresponding "Message Preference" by clicking on the link below the text box.

Work Activity

As you process email messages, Email Center records the number of message transactions you have performed during selected time periods. On the Email Center Home tab, the Work Activity container lists the current count of the transactions you have performed for each type of message activity recorded by Email Center. The Work Activity container can be set for the following periods:

- Today

- This Week

- Since Last Login

The message activities recorded are:

- Fetched - Messages which you have fetched from the Queued Messages container.

- Responded - Messages you have fetched or been transferred and to which you have responded.

- Deleted - Messages which you have deleted.

- Transferred - Messages which you have transferred to another agent.

- Composed - Messages you have composed.

- Rerouted - Messages that you have received, then placed back into the same queue or a different queue forwarded to another agent.

- Opened - Messages that were assigned or transferred to an agent and have been read by the agent.

The Work Activity container also contains a Pending column. This column provides a count of the messages that have been finished by the agent and are currently queued for processing by the Outbox Processor.

> **Note:** As these messages are processed by the Outbox Processor, the item count should drop to zero. If the count remains the same for an extended period of time, this may indicate an error.

2

Using Oracle Email Center

This chapter covers the following topics:

- Email Center Home
- Email Center Messages Inbox
- Email Center Messages Search
- Email Center Messages
- Knowledge Base Repositories
- Knowledge Base Search
- Email Center Customer Search
- Managing Accounts
- Managing Agents
- Managing Documents
- Managing Queries
- Setting Email Center Agent Console Profiles

Email Center Home

Use the Home tab to view a summary of your message activity, work on messages, or take a break.

The Home page contains three containers:

- The Message Summary container

  The Message Summary container allows you to view information about the messages waiting in each queue or classification, queue-access enabled messages, and the messages in your Inbox. Only the email accounts assigned to you are displayed.

For each queue or classification, the Message Summary container shows you the number of messages currently in the queue or classification, the amount of time the oldest message has been in the queue or classification, and permits you to retrieve the next message from any of the queues or classifications that have email messages waiting in them. If you have queue access to an account, then the Message In Queue number appears as a hyperlink that takes you to the messages. It multiple classifications exist under an account, then the hyperlink appears at the account level rather than the classification level.

The Get Next Message icon is only activated when there is an inbound message waiting in the corresponding queue. When no messages are present in a particular queue, the icon is grayed out. Next message refers to the oldest message in the queue selected by the agent. Email Center follows the First-In-First-Out protocol, thus the oldest email is delivered to the agent. However, an incoming email can be categorized into multiple queues (classifications) based on prioritization.

For your Inbox, the Message Summary container shows you the current message count for each account or classification, the amount of time the oldest message has been in your Inbox for each account or classification, and provides an icon allowing you to compose a new email message for any of the accounts listed. If you have an unread email in your inbox, the number in the count column will be bolded. These emails are either assigned to you by your supervisor, transferred to you by another agent or got automatically routed to you.

- The Work Activity container

  The Work Activity container lists the current count of the transactions you have performed for each type of message activity recorded by Email Center. The Work Activity container can be set for the following periods by setting the corresponding Profile option:

  - Today

  - This Week

  - Since Last Login

    The recorded message activities are:

  - Fetched - Messages which you have fetched from the Queued Messages container.

  - Responded - Messages you have fetched or been transferred and to which you have responded.

  - Deleted - Messages which you have deleted.

  - Transferred - Messages which you have transferred to another agent.

- Composed - Messages you have composed.

- Rerouted - Messages that you have received, then placed back into the same queue or a different queue forwarded to another agent.

- Opened - Messages that were assigned or transferred to an agent and have been read by the agent.

  The Work Activity container also contains a Pending column. This column provides a count of the messages that you have finished and are currently queued for processing by the Outbox Processor.

  > **Note:** As these messages are processed by the Outbox Processor, the item count should return to zero. If the count remains the same for an extended period of time, this may indicate an error.

- The Break container

  The Break container provides you with a means of indicating when you are going on a break and for what reason.

Getting a Message from an Email Account:

The Queued Messages container displays the number of messages in each email account by classification.

Use this procedure to obtain the next message from an account in the Queued Messages container.

Login

HTML Login URL

Responsibility

Email Center Agent Console

Email Center Message Component

Prerequisites

Steps

1. Click the **Home** tab.

2. You can request the next message at the account level or from a specified classification within an account. In the Account/Classification column of the Queued Messages container, click the drill-down arrow to expand an account to

show the classifications within it.

3. In the Get Next Message column, click the icon for the appropriate account or classification.

The oldest email from that account or classification queue will be delivered to you.

The Email Center Message Component is launched in a new browser window. The Reply page is displayed and the contents of the incoming email are automatically inserted in-line to speed up the process of responding to an email inquiry.

Composing a Message:

Use this procedure to compose a message from the Home tab.

Login

HTML Login URL

Responsibility

Email Center Agent Console

Email Center Message Component

Prerequisites

Steps

1. In the Email Center Agent Console, click the **Home** tab.

2. In the Compose New Message column, click the Compose New Message icon for the account from which you want to send the message.

The Email Center Message Component is launched in a new browser window and the Compose page is displayed.

3. In the From list, ensure the correct account is listed.

4. If you know the email address of the recipient, type it in the To field. Otherwise, use the Customer Search feature to locate the desired recipient and associate the recipient with the email message.

See the Email Center Customer Search, page 2-51 topic for more information on the Customer Search feature.

5. Optionally, in the Cc field, type the email address of the secondary recipients of the message.

Use a comma or semi-colon to separate multiple addresses in the same field.

> **Note:** These email addresses will be displayed to other recipients.

6. Optionally, in the Bcc field, type the email address of the secondary recipients of the message.

   Use a comma or semi-colon to separate multiple addresses in the same field.

   > **Note:** These email addresses will not be displayed to other recipients.

7. In the Subject field, type a subject for the message.

8. Click the Edit Attachments hyperlink if you want to include or attach a file to the message.

9. Depending on which mode you have set as your default, click the Change to Plain Text Mode, or Change to Rich Text Mode hyperlink.

   See the Selecting the Message Composition Mode , page 2-28topic for more information on the two text modes.

   See the Setting Message Preferences, page 2-44 topic for more information on selecting a default text mode.

10. Type your message body in the provided field.

11. Click the Spell Check hyperlink if you want to spell check your message.

    See the Spell Checking a Message, page 2-29 topic for more information on spell checking messages.

12. When you are ready to send the email message, select **Send** from the action field, select the appropriate reason from the list in the Reason field, and click **Go**.

Viewing Your Inbox:

The My Inbox Summary container displays the number of messages that you have in your Inbox. These include the messages you obtained from the Queued Messages container, but have not processed and the messages that were either assigned to you by supervisor, transferred to you by another agent or automatically routed to you.

Use this procedure to view the emails in your inbox.

Login

HTML Login URL

Responsibility

Email Center Agent Console

Email Center Message Component

Prerequisites

Steps

1. On the Email Center Agent Console, click the **Home** tab.

2. In the Count column of the My Inbox area, click the hyperlinked count number for the appropriate account or classification.

   The My Inbox page appears, displaying all the emails you have in your Inbox for the selected email account.

   Alternatively, you can click the Messages tab in the Email Center Agent Console to view your inbox related to a specific account. The "Default Account" for which the messages are displayed can be set via personal profile options. Refer to setting the personal profile option section.

3. If you want to list messages for a different account, select a different account from the list in the Switch Account field and click **Go**.

4. If you want to reply to a message, click a subject hyperlink in the Subject column.

   The Reply page appears in a new browser window.

5. Follow the steps in the Replying to a Message in Your Inbox topic.

Viewing a Summary of Your Message Activity:

Use this procedure to view a summary of your message activity for a selected time period.

Login

HTML Login URL

Responsibility

Email Center Agent Console

Email Center Message Component

Prerequisites

Steps

1. Click the **Home** tab.

   The Work Activity container can be set for the following periods:

   • Today

- This Week

- Since Last Login

These time periods can be selected by clicking **Profile > Email Center > General**.

The message activities recorded are:

- Fetched - Messages which you have fetched from the Queued Messages container.

- Responded - Messages you have fetched and to which you have responded.

- Deleted - Messages which you have deleted.

- Transferred - Messages which you have transferred to another agent.

- Composed - Messages you have composed.

- Rerouted - Messages that you have received, then placed back into the same queue or a different queue forwarded to another agent.

- Opened - Messages that were assigned or transferred to an agent and have been read by the agent.

  The Work Activity container also contains a Pending column. This column provides a count of the messages that you have finished and are currently queued for processing by the Outbox Processor.

  > **Note:** As these messages are processed by the Outbox Processor, the item count should return to zero. If the count remains the same for an extended period of time, this may indicate an error.

Taking a Break:

Use this procedure to take a break from working with Oracle Email Center.

Login

HTML Login URL

Responsibility

Email Center Agent Console

Email Center Message Component

Prerequisites

Steps

1. On the Email Center Agent Console, click the **Home** tab.

2. From the Reason list in the Break container, select a reason for taking a break.

3. Optionally, if you want to end your Email Center session, select **End Session** and you will be logged out of the Email Center Agent console.

    > **Note:** If you select **End Session**, you will not be able to return to Email Center by selecting **End Break**. You must log in again.

4. Click **Go on Break**.

    The On Break page appears. The page displays the elapsed time and refreshes every minute.

5. If you want to return to work, click **End Break**.

    The Home tab appears.

Email Center Messages Inbox

Your inbox contains messages that you have obtained from the Queues, messages that have been assigned or transferred to you by a supervisor or another agent, and messages that have been automatically routed to you.

The list in the Switch Account field allows you to quickly switch between the accounts to which you are assigned. The My Inbox container functions on a per account basis; therefore, you will only see the messages you have in your inbox from the account selected in the Switch Account field.

The My Inbox container displayed on the Messages page provides the following columns to aid you in your work:

*   **Select** - You can select this box to indicate which message(s) you want to transfer or delete. If you are doing a batch delete or batch transfer, you can use the Select All or Select None hyperlinks at the bottom of the container.

*   **Read** - You can use this column to sort messages such that you can view all unread messages together on the top of the list. Unread messages are displayed in bold face to help differentiate them from read messages.

*   **Priority** - This column shows you which messages have been flagged by the agent who transferred or assigned the message as high priority. Using this column will help you determine which message(s) to handle first. If you are a supervisor then emails escalated to you by other agents, will display a priority of "Escalated".

- **From** - The From column shows you the email address of the sender.

- **Subject** - The Subject column displays the subject line from the message.

- **Classification** - The Classification column shows you which classification the message belongs to or if the message is unclassified.

- **Date** - The Date column displays the date on which the message was originally sent.

- **Status** - The Status column shows you the current status of the message. This column lets you see whether a message is new, or has been read, transferred, or assigned.

Use the My Inbox subtab to open messages in your inbox.

Listing Messages in Your Inbox by Account:

Use this procedure to list messages in your inbox:

Login

HTML Login URL

Responsibility

Email Center Agent Console

Email Center Message Component

Prerequisites

You must first have a message in your Inbox.

Steps

1. Click the **Messages** tab.

   The My Inbox page appears.

2. From the list in the Switch Account field, ensure you have selected the appropriate account. If not, select it from the list and click **Go**.

   The My Inbox page refreshes to display all the messages you have in your inbox for the selected account.

3. To view an individual message, in the Subject column, click the hyperlinked message subject.

   The Message Component Reply page opens in a new browser window and displays the selected message.

Replying to a Message in Your Inbox:

Use this procedure to reply to a message in your inbox.

Login

HTML Login URL

Responsibility

Email Center Agent Console

Email Center Message Component

Prerequisites

You must first have a message in your Inbox.

Steps

1. Click the **Messages** tab.

2. From the list in the Switch Account field, select an account.

   The My Inbox page appears, displaying a list of all messages in your inbox for the selected account.

3. In the Subject column click a subject hyperlink.

   The Reply page appears in a new browser window.

4. If you need to review past email exchanges with this customer for this particular issue, then click the Thread tab to view such exchanges.

   By default the emails are displayed in descending order of time so that the most recent email exchange appears on top.

5. Returning to the Reply page, optionally, in the Cc field, type the email address of the secondary recipients of the message.

   Use a comma or semi-colon to separate multiple addresses in the same field.

   > **Note:** These email addresses will be displayed to other recipients.

6. Optionally, in the Bcc field, type the email address of the secondary recipients of the message.

   Use a comma or semi-colon to separate multiple addresses in the same field.

   > **Note:** These email addresses will not be displayed to other recipients.

7. Click the Edit Attachments hyperlink if you want to include or attach a file to the reply message.

8. Depending on which mode you have set as your default, click the Change to Plain Text Mode, or Change to Rich Text Mode hyperlink.

   See the Selecting the Message Composition Mode , page 2-28topic for more information on the two text modes.

   See the Setting Message Preferences, page 2-44 topic for more information on selecting a default text mode.

9. Type your reply in the provided field.

10. Click the Spell Check hyperlink if you want to spell check your message.

    See the Spell Checking a Message, page 2-29 topic for more information on spell checking messages.

11. When you are ready to send the email message, select **Send** from the action field, select the appropriate reason from the list in the Reason field, and click **Go**.

Composing a New Message:

Use the steps below to compose a new message from the Messages tab.

Login

HTML Login URL

Responsibility

Email Center Agent Console

Email Center Message Component

Prerequisites

Steps

1. Click the **Messages** tab.

2. From the list in the Switch Account field, select the account from which you want to send the message.

3. Click **Compose New Message**.

   The Compose page appears in a new browser window.

4. In the From list, ensure the correct account is listed.

5. If you know the email address of the recipient, type it in the To field. Otherwise, use

the Customer Search feature to locate the desired recipient and associate the recipient with the email message.

See the Email Center Customer Search, page 2-51 topic for more information on the Customer Search feature.

6. Optionally, in the Cc field, type the email address of the secondary recipients of the message.

   Use a comma or semi-colon to separate multiple addresses in the same field.

   > **Note:** These email addresses will be displayed to other recipients.

7. Optionally, in the Bcc field, type the email address of the secondary recipients of the message.

   Use a comma or semi-colon to separate multiple addresses in the same field.

   > **Note:** These email addresses will not be displayed to other recipients.

8. In the Subject field, type a subject for the message.

9. Click the Edit Attachments hyperlink if you want to include or attach a file to the message.

10. Depending on which mode you have set as your default, click the Change to Plain Text Mode, or Change to Rich Text Mode hyperlink.

    See the Selecting the Message Composition Mode , page 2-28 topic for more information on the two text modes.

    See the Setting Message Preferences, page 2-44 topic for more information on selecting a default text mode.

11. Type your message body in the provided field.

12. Click the Spell Check hyperlink if you want to spell check your message.

    See the Spell Checking a Message, page 2-29 topic for more information on spell checking messages.

13. When you are ready to send the email message, select **Send** from the action field, select the appropriate reason from the list in the Reason field, and click **Go**.

Transferring a Message:

Use the steps below to transfer a message on the Messages tab.

Login

HTML Login URL

Responsibility

Email Center Agent Console

Email Center Message Component

Prerequisites

Steps

1. Click the **Messages** tab.

2. From the list in the Switch Account field, select the account containing the email message you want to transfer.

3. In the Select column, select the box for the appropriate message and click **Transfer**.

    The Transfer page appears.

4. In the Search field, select **Agent** or **Supervisor** and click **Go**.

5. In the select column, select the radio button for the appropriate agent or supervisor to whom you want to transfer the message.

6. From the Message Priority field, select **High**, if you want to indicate to the recipient that the message is urgent.

    The available Message priorities depend on the type of user selected. If an agent is selected then only a message priority of "High" is available. However, if a supervisor is selected then an "Escalation" message priority is also available to enable agents to escalate emails to their supervisors.

7. From the list in the Transfer Reason field, select the appropriate reason you are transferring the message.

8. Optionally, in the Transfer Note field, type a note if you want to provide further explanation for the transfer.

9. Click **Apply**.

    The selected message is transferred and you return to the My Inbox page.

Deleting a Message:

Use the steps below to delete a message on the Messages tab.

Login

HTML Login URL

Responsibility

Email Center Agent Console

Email Center Message Component

Prerequisites

Steps

1. Click the **Messages** tab.

2. From the list in the Switch Account field, select the account containing the email message you want to delete and click **Go**.

3. In the Select column, select the box for the appropriate message and click **Delete**.

    The selected message is deleted and you return to the My Inbox page. The "default" reason code selected by the administrator for the Delete action will be recorded for every email.

Rerouting a Message:

Once an inbound email message is in your Inbox, you can use the Email Center Agent Console to reroute the message. Rerouting a message involves placing the message back into another classification queue.

Login

HTML Login URL

Responsibility

Email Center Agent Console

Email Center Message Component

Prerequisites

Steps

1. Click the **Messages** tab.

2. From the list in the Switch Account field, select the account containing the email message you want to reroute or requeue and click **Go**.

3. Click the hyperlinked subject heading for the appropriate email message.

    The Reply page appears.

4. From the list in the Action field, select **Reroute** and click **Go**.

   The Reroute page appears.

5. If you want to reroute the message to a different classification:

   1. From the list in the Classification field, select a different classification in which you believe the message belongs. For a reroute to occur, you MUST select a different classification than the one listed in the Inbound Message Details area.

   2. From the list in the Reroute Reason field, select the appropriate reason for rerouting the message.

   3. Optionally, in the Reroute Note field, type a more thorough explanation of why you are rerouting the message.

6. Click **Apply**.

   The reply page closes and the message is rerouted or requeued.

Escalating a Message:

Use the steps below to escalate a message to a supervisor.

Login

HTML Login URL

Responsibility

Email Center Agent Console

Email Center Message Component

Prerequisites

Steps

1. Click the **Messages** tab.

2. From the list in the Switch Account field, select the account containing the email message you want to escalate and click **Go**.

3. Click the hyperlinked subject heading for the appropriate email message.

   The Reply page appears in a new window.

4. From the list in the Action field, select **Transfer** and click **Go**.

   The Transfer page appears.

5. From the list in the Search field, select **Supervisor** and click **Go**.

The Transfer page refreshes to display a list of all supervisors.

6. In the Select column, select the radio button for the supervisor to whom you want to escalate the message.

7. From the list in the Message Priority field, select **Escalated**.

8. From the list in the transfer Reason field, select the appropriate reason for escalating the message.

9. Optionally, in the Transfer Note field, type a more detailed explanation for the transfer.

10. Click **Apply**.

The transfer page closes and the message is escalated to the selected supervisor.

Email Center Messages Search

Use the Search subtab to search for messages in your inbox or an account folder. Your inbox contains messages that you have obtained from the queues, messages that have been assigned or transferred to you by a supervisor or agent, and messages that have been automatically routed to you.

Use the Account field to indicate which email account you want to search.

Searching for a Message:
Use this procedure to search for a message in your inbox or in a folder for an account.

Login

HTML Login URL

Responsibility

Email Center Agent Console

Email Center Message Component

Prerequisites

Steps

1. Click the **Messages** tab.

2. Click the **Search** subtab.

The Message Search page appears.

3. Enter the search criteria.

You must select an account.

Email Center automatically treats all searching strings as a string appended by wildcard (%). For example, if you are searching someone with the last name of Smith, you could type "sm". All string/text searches must have at least two characters.

4. Click **Search**.

The Message Search Results page appears. The search results include the Select, From, To, Subject, Sent Date, and Processed By columns. The Processed By column indicates the user who resolved or deleted the email.

The following table lists the actions that you can perform in each folder.

From this folder...	You can...
Inbox	• View a message.
	• Reply to a message.
Deleted	• View a message.
	• Reply to a message.
	• Forward a message.
Resolved	• View a message.
	• Reply to a message.
	• Forward a message.
Sent	• View a message.
	• Resend a message.
	• Forward a message.

5. If you want to refine your search criteria, click **Refine Search Criteria**.

The Message Search page appears.

6. If you want to view a particular message from the search results, click the appropriate hyperlinked subject heading in the Subject column.

The message is displayed in a new window.

Viewing a Message:

Use this procedure to view a message from the search results.

Login

HTML Login URL

Responsibility

Email Center Agent Console

Email Center Message Component

Prerequisites

Steps

1. Click the **Messages** tab.

2. Click the **Search** subtab.

    The Message Search page appears.

3. Search for a message.

    The Message Search Results page appears.

4. If you want to refine your search criteria, then click **Refine Search Criteria**.

    The Message Search page appears.

5. If you want to view the original message, click the subject hyperlink in the Subject column.

    The message is displayed in a new window.

Resending a Message:

Use this procedure to resend a message in the Sent folder for an account.

Login

HTML Login URL

Responsibility

Email Center Agent Console

Email Center Message Component

Prerequisites

Steps

1. Click the **Messages** tab.

2. Click the **Search** subtab.

   The Message Search page appears.

3. Search for a message in the Sent folder.

   The Message Search Results page appears.

4. If you want to refine your search criteria, then click **Refine Search Criteria**.

   The Message Search page appears.

5. If you want to view the original message, click the subject hyperlink in the Subject column.

   The Original Message page appears.

6. On the Message Search Results page, click the radio button in the Select column for the message you want to resend.

7. Click **Resend**.

   The Message Search Results page refreshes. The resent message appears in the list of search results.

Replying to a Message:

Use this procedure to reply to a message in your Inbox.

Login

HTML Login URL

Responsibility

Email Center Agent Console

Email Center Message Component

Prerequisites

Steps

1. Click the **Messages** tab.

2. Click the **Search** subtab.

   The Message Search page appears.

3. Search for a message in the Inbox.

The Message Search Results page appears.

4. If you want to refine your search criteria, then click **Refine Search Criteria**.

   The Message Search page appears.

5. If you want to view the original message, click the subject hyperlink in the Subject column.

   The Original Message page appears.

6. Select the radio button next to the message and then click **Reply**.

   The Reply page appears.

Transferring a Message:

Use the steps below to transfer a message from your Inbox to another agent.

Login

HTML Login URL

Responsibility

Email Center Agent Console

Email Center Message Component

Prerequisites

Steps

1. Click the **Messages** tab.

2. Click the **Search** subtab.

3. Search for the message you want to transfer.

4. In the Select column, click the box for the message you want to transfer, and click **Reply**.

   The Transfer page appears.

5. In the Action field, select **Transfer**, and click **Go**.

6. In the Transfer Target fields, select whether you want to transfer the message to an agent or supervisor, and search for and select the agent or supervisor to whom you want to transfer the message.

7. Optionally, in the message priority field, select a priority level for the message.

8. In the Transfer Reason field, select a reason explaining why you are transferring the message.

9. Optionally, in the Transfer Note field, type a note providing further information about the transferred message.

10. Click **Apply**.

Deleting a Message:

Use the steps below to delete a message from your Inbox.

Login

HTML Login URL

Responsibility

Email Center Agent Console

Email Center Message Component

Prerequisites

Steps

1. Click the **Messages** tab.

2. Click the **Search** subtab.

3. Search for the message you want to delete.

4. In the Select column, click the box for the message you want to delete, and click **Reply**.

   The Transfer page appears.

5. In the Action field, select **Delete**, and click **Go**.

   The selected message is deleted.

Email Center Messages

The Message Component provides the message composition, reply and preview functionality in a common module. The purpose of this component is to either reply, send, transfer, reroute, or delete an outbound email message, or view an inbound email message and process it. Once an action is taken on the message, the browser window will close automatically. The Message Component is incorporated in the Agent Console such that all functionality pertaining to a single message is now presented in a separate browser window. This enables multiple email messages to be open at one time.

Whenever an email is opened (next message fetched from the Queue, Inbox email opened, Interaction email viewed), the email will be launched in a separate browser window.

The Message Component also enables other Oracle E-Business Suite applications to use Email Center functionality while viewing and responding to archived emails or composing new emails.

Launching The Email Center Message Component from UWQ :

By modifying the following two views related to the email media in Oracle Universal Work Queue, you can acquire the next message from the queue and open an email from the inbox directly from Oracle Universal Work Queue.

Queued Messages

The Queued Messages view provides a count for the number of messages queued up for a given account and a display of the messages for a subset of accounts that are enabled for queue access. For accounts for which you have not been given queue access, you can drill down to view the count of messages queued up for each classification. If, however, you have queue access to an account, then clicking that account displays all the messages in the associated queue. Only the email accounts to which you been assigned are displayed here. You can acquire the next email message for a specific classification or the next email message across all classifications for that account by double-clicking the appropriate row or by selecting the row and clicking the Get Work icon in the menu bar. Emails are always delivered to agents in a first-in-first-out (FIFO) ordering.

When an agent begins the acquire next email process, the Email Center Message Component launches in a separate browser window and the contents of the email along with suggested responses and matching customer data is displayed in the Reply screen. When the agent ends the interaction by either responding to the email, transferring, rerouting or deleting it, the Message Component window automatically closes. The agent can have more than one email message open at the same time because each of them is recorded as a separate interaction.

My Inbox

The "My Inbox" view displays the list of emails in an agent's inbox. The agent can view emails across all the accounts to which he/she is assigned or view a list of emails for a specific account. The following details are displayed for each email in the agent's inbox:

- Read/New - This column indicates if the message has already been read by the agent or not. An email could get placed in the agent's inbox if it was automatically routed to the agent, transferred by another agent, or assigned by a supervisor. In any of these cases, the email would be marked as "New" until the agent views it.

- Account - The account name to which the email belongs is only displayed in a summary view of ALL emails in the agent's inbox. This column is not displayed when the agent drills down to a specific email account.

- Classification - The predefined account into which the email was classified.

- From - Sender's email address

- Subject - Email subject

- Date - The date on which the email was received.

- Priority - While transferring an email to another agent, a "high" priority can be assigned to the email. Additionally, while transferring an email to a supervisor, an "Escalated" priority could be assigned. These priorities are displayed here for corresponding emails.

- Status - The current status of the email. Could be "Read," "Transferred," "Escalated," "Auto Routed," "Assigned," or "Saved."

Follow the tasks below to set the two profile options:

Enable Launching of Email Center Message Component from UWQ

Perform the following steps to enable the launching of Message Component from UWQ Desktop.

Login

Forms Login URL

Responsibility

System Administration

Prerequisites

Steps

1. From the Application menu select **Menu** to launch the "Menus" window.

2. In Query mode, search for 'CSX_CUSTOMER_SUPPORT' in the 'User Menu Name'.

3. Add a new row to the resulting set of Functions under this menu and add the **IEM_MC_LAUNCHER** function to this menu.

4. Save the record and exit.

Enable Display of Email Media counts in UWQ

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

Login

Forms Login URL

Responsibility

System Administration

Prerequisites

Steps

1. From the Profile menu select **System** to launch the "Find System Profile Values' window.

2. Type **IEU%Email%** and search for matching system profiles.

3. Set the IEU: Queue: Inbound Email profile to **Yes**.

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

Launching the Email Center Message Component by Picking from the Queues Tab:

When you have been assigned access to an account that an administrator has enabled for queue access, the Queues tab appears on the top tab list of the agent home page. If you do not have access to any account that is enabled for queue access, then you see the message "No access to queue access accounts." If you have access, then you can select a message to work on.

Use this procedure to pick a message from the Queues tab.

Login

HTML Login URL

Responsibility

Email Center Agent Console

Email Center Message Component

Prerequisites

Messages must be available in a queue under an account that is queue-access enabled and to which you have agent-level queue access.

Steps

1. Click the **Queues** tab.

   The Queued Messages page appears. All the subjects for emails in the queue for the displayed account appear in ascending order by time. The account defaults to the first one available in alphabetical order.

2. If you want to display email subjects for another account, choose it from the **Account** LOV, and click **Go**.

3. Click the corresponding **Number** link to view an available service request for a subject.

4. To investigate a message further, click the **Subject** hyperlink for the email of interest.

   A page appears that displays the content of the email and customer or employee information.

5. After reading the email, decide how you want to proceed and click one of the following:

   - **Cancel** to refuse the email and return to the Queued Messages page

   - **Accept and Reply** to assign the email to yourself and begin work on the reply

   - **Accept** to assign the email to yourself and return to the Queued Messages page

Addressing the Message:

Email Center has the capability to auto-populate the To field if the customer is known. If you search for and select a customer to be associated with the email, Email Center will auto-populate the To field.

If the customer is not known, then you must type the customer address in the To field.

Use this procedure to address the message.

Login

HTML Login URL

Responsibility

Email Center Agent Console

Email Center Message Component

Prerequisites

Steps

1. If you are composing a message, then select an account from the From list.

   > **Note:** If you are replying to a message, then the message will automatically be sent from the account in which the original message was received.

2. In the To field, type the email address of the primary recipients of the message.

   If you are composing an initial message and the customer has not been associated

with the email, then the To field is blank. If you are replying to a message, then the To field contains the email address of the sender of the original email.

Use a comma or semi-colon to separate multiple addresses in the same field.

Optionally you can search for a customer and the To address will be automatically populated.

3. Optionally, in the Cc field, type the email address of the secondary recipients of the message.

Use a comma or semi-colon to separate multiple addresses in the same field.

> **Note:** These email addresses will be displayed to other recipients.

4. Optionally, in the Bcc field, type the email address of the secondary recipients of the message.

Use a comma or semi-colon to separate multiple addresses in the same field.

> **Note:** These email addresses will not be displayed to other recipients.

Attaching a File from the Local File System:

Use this procedure to attach a file from the local or networked file system.

Login

HTML Login URL

Responsibility

Email Center Agent Console

Email Center Message Component

Prerequisites

Steps

1. Click the **Edit Attachments** hyperlink.

The Edit Attachments page appears.

2. In the File Name field, type the path to the file or click **Browse** to choose the path.

3. Repeat the previous step for each additional file you want to add to the message.

4. Click **Add**.

The Edit Attachments page refreshes. The filename appears in the list of attachments.

5. If you want to view or edit an attachment, click the filename hyperlink in the Attachment column.

   Depending on the type of file, you may not be able to edit the attachment.

6. If you want to remove the attachment, select the box in the Remove column for the file that you want to remove from the message.

7. Click **Update**.

   The Edit Attachments page refreshes. The attachment is removed from the list of attachments.

8. If you want to return to the message composition page, click **Done**.

   A filename hyperlink appears near the Attachments field.

Viewing Message Notes:

Use this procedure to view a note for an email message.

Login

HTML Login URL

Responsibility

Email Center Agent Console

Email Center Message Component

Prerequisites

Steps

1. From the Compose or Reply page, click the **Add Note** hyperlink.

   The Add Note page appears.

2. In the Existing Notes field, you can view all existing notes for the email message.

Adding Notes to a Message:

Use this procedure to add a note to a message.

Login

HTML Login URL

Responsibility

Email Center Agent Console

Email Center Message Component

Prerequisites

Steps

1. Click the **Add Note** hyperlink.

   The Add Note page appears.

2. The Note Type field is automatically populated depending on what you are doing.

   The note type is determined by the action being taken. For example, when a supervisor assigns an email to an agent, he can enter an "Assign Reason", or when an agent deletes an email, she can enter a "Delete Reason".

3. In the Note Text field, type your note text.

4. Click **Apply**.

   Your note is added to the email message.

Selecting the Message Composition Mode:

Oracle Email Center provides you with two types of editors - a plain text editor and a rich-text editor. A rich text editor enables you to format the font of the email, and include an image or hyperlink in the email. You should use the "Rich Text" editor for all HTML documents. You, can switch from one editor to another by clicking on the link provided above the text box. By default the plain text editor will be displayed. However if the you want to make the "rich text" editor the default, you can do so by setting the corresponding profile option.

> **Note:** You can set your default mode by clicking **Profile > General** and, under the Editing area, selecting or deselecting the box that activates the rich text editing mode.

> **Note:** You can also perform this task by clicking on Message Preferences link under the editor box in the Reply or Compose screen.

Use the steps below to change the text editing mode from the Compose or Reply pages.

Login

HTML Login URL

Responsibility

Email Center Agent Console

Email Center Message Component

Prerequisites

Steps

1. If you want to compose the message using plain text, click the **Change to Plain Text Mode** hyperlink.

2. If you want to compose the message using formatted text, click the **Change to Rich Text Mode** hyperlink.

    You can set the default text mode on the profile page (**Profile > Email Center> General**).

    A formatting tool bar appears.

Spell Checking a Message:

Follow the steps below to spell check your email message.

Login

HTML Login URL

Responsibility

Email Center Agent Console

Email Center Message Component

Prerequisites

Steps

1. Once you have finished typing your email message, click the **Spell Check** hyperlink.

    The Spell Check page appears.

2. From the Spell Check Language list, select the appropriate language. If you select a different language than what is displayed as the default, click **Recheck With New Language**.

    The spell checker begins and highlights the first questionable word in your email message by turning the text color red.

    The change To field lists the top suggestion for the word in question.

    The suggestions list contains a number of potential words from which you can select.

3. To choose a replacement word from the Suggestions list:

1. Select the word you want from the list.

2. Click **Change** or **Change All**.

    Clicking **Change** will correct only the single highlighted instance. If this word is repeatedly misspelled in your email message, click **Change All** and the spell checker will replace all instances of that word with the correct one.

4. To manually correct a misspelled word:

    1. In the Change To field, type the word correctly.

    2. Click **Change** or **Change All**.

5. Click **Apply**.

Managing Customer Information:

Oracle Email Center divides customers or "Parties" into three categories - organization, contact, and person.

The concept of "Party" enables the customer model to treat all business entities equally. This means that each customer, regardless of type (organization, relationship, or person), is handled in the same way by the model. Because all business entities are treated alike, the customer model can easily handle B2B, B2C, or mixed business models. Although the model tracks attributes for people differently from those it tracks for organizations (for example: date of birth, title, and gender for people; DUNS number, SIC code, and fiscal year end for organizations), both people and organizations are parties, and their records are therefore stored in the same physical table in the database.

The relationship between two parties may be viewed as a party in its own right. For example, if John works at Oracle, three parties could exist: John (party of type Person), Oracle (party of type Organization), and John@Oracle (party of type Contact of or party of type Employee of). Because John@Oracle is a party in its own right, addresses, phone numbers, and customer accounts can be directly associated with the John@Oracle entity.

The customer model separates the business entity (Party) from the business relationship (Contact of or Employee of). This allows each party to have multiple customer accounts. Using the example in the previous paragraph, John could have two distinct accounts. One account as John (type "Person") which could contain a personal email address and personal information, and one as John@Oracle (type "Employee of"), which would have a business email address, and business related information. As well, John may be recognized as the contact person for his organization, therefore, aside from having an account of type "Employee of," he may also have an account of type "Contact of."

Customers and Contacts created by the business application can be easily selected by the Email Center processing engine and/or agent console. Details of the specific Oracle Email Center changes relating to Customers are below:

1. **Oracle Email Center Server Processing - Customer Lookup**

   An attempt is made to identify the customer and contact for each incoming email message. This attempt is performed using the email address to search for the customer in the customer database. If the customer is identified, the customer and contact records are shown on the Reply page. If there are multiple customer records found for the address, a message with a link is displayed and by clicking the link you can identify which customer and contact to use for this interaction. If the email address was not found in the customer database, Email Center uses the default customer, but if there is sufficient information in the inbound message, you can use the Customer search to identify the customer.

2. **Oracle Email Center Agent Console/Message Component - Customer Search**

   Oracle Email Center allows you to search for customers on the following criteria:

   - Customer name - Search only parties matching the customer name entered.

   - Last Name and First Name - Search only parties matching the last/first name entered. Last name is a mandatory search field whereas First name is optional.

   - Email Address - Search parties who have an "email" contact point that matches the email address entered.

   - Customer Number - Search parties whose customer number matches the number entered.

   - Customer ID - Search parties whose customer ID matches the ID number entered.

     > **Note:** Oracle Email Center only searches for "CONTACT_OF" or "EMPLOYEE_OF" type of relationships by default. To view other types of relationships, search for one of the parties involved and then navigate to the Overview page by clicking on the name of the selected party.

   - **Recording Interactions**

     The interaction is always recorded against the Customer. If the system processing could not find a matching customer, the agent is prompted to search for and select a customer for recording the interaction. However, if the agent wishes not to, then the "default" customer (created during the setup phase by the administrator) is selected.

   Topics include:

   - Associating a Customer with the Message, page 2-32

- Adding Email Addresses to a Customer Record, page 2-33

- Setting an Email Address as the Primary Address, page 2-34

- Disabling an Email Address, page 2-35

- Viewing Customer Details and Interactions, page 2-36

Associating a Customer with the Message

Use this procedure to associate a customer with the message.

Login

HTML Login URL

Responsibility

Email Center Agent Console

Email Center Message Component

Prerequisites

Steps

1. In the Customer container, click the **Search** hyperlink.

    The Customers page appears.

2. In the Customer Search area, select a criteria radio button and enter the search criteria.

    Email Center automatically treats all searching strings as a string appended by wildcard (%). For example, if you are searching someone with the last name of Smith, you could type "sm". All string/text searches must have at least two characters.

3. If you want to return to the message composition window, then click the Message tab.

4. To perform the search, click **Go**.

    The search results appear.

5. Select the radio button next to the customer.

6. Select **Associate to message** from the list and click **Go**.

    The message composition window appears. The information for the selected customer is displayed in the Customer container. The primary email address of the selected customer is automatically inserted into the "To" field.

Alternatively you can view the customer details and associate the customer from the Overview page as described in the Viewing Customer Details and , page 2-36 Interactions topic.

Adding Email Addresses to a Customer Record

Use this procedure to add a new or additional email address to an existing customer record.

Login

HTML Login URL

Responsibility

Email Center Agent Console

Email Center Message Component

Prerequisites

Steps

1. Click the **Customer** tab

2. If your are typing a new email:

    1. In the Customer Search area, select a radio button for the type of search criteria you want to use to find the desired customer.

    2. In the field corresponding to the radio button you selected in the previous step, type the search criteria.

        Email Center automatically treats all searching strings as a string appended by wildcard (%). For example, if you are searching someone with the last name of Smith, you could type "sm". All string/text searches must have at least two characters.

    3. Click **Go**.

        The search result appears in rows grouped by customer types: organization, contact, and person.

    4. If the selected customer does not have an existing email address, select the radio button for the appropriate customer, select Associate to email and click **Go**.

        You return to the Compose page and the Customer container refreshes to display information for the selected customer.

    5. In the Customer container, click the Email Address icon.

The Email Address page appears.

6. In the New Address field, type the email address for the selected customer, and click **Add**.

7. If you add more than one email address for the customer, select the one you want to use as the primary address, and click **Set as Primary**.

3. If you are replying to an email:

   1. In the Customer container, click the Email Address icon.

      The Email Address page appears.

   2. In the New Address field, type the email address for the selected customer, and click **Add**.

   3. If this is an additional address for the customer, select the one you want to use as the primary address, and click **Set as Primary**.

4. Click **Close**.

Setting an Email Address as the Primary Address

Use this procedure to select an email address to be used as the primary address for a customer.

Login

HTML Login URL

Responsibility

Email Center Agent Console

Email Center Message Component

Prerequisites

Steps

1. If you are replying to an email and you want to set the default address as the primary address, in the Customer container, click the **Make To Address Primary** hyperlink.

2. If you are replying to an email and you want to select a different address than the default as the primary address:

   1. In the Customer container, click the email icon.

      The Email Address page appears.

2. From the Email Address list, select the address you want to make the primary address and click **Set as Primary**.

3. If you are typing a new email:

   1. In the Customer container, click the **Search** hyperlink.

   2. In the Customer Search area, select a radio button for the type of search criteria you want to use to find the desired customer.

   3. In the field corresponding to the radio button you selected in the previous step, type the search criteria.

      Email Center automatically treats all searching strings as a string appended by wildcard (%). For example, if you are searching someone with the last name of Smith, you could type "sm". All string/text searches must have at least two characters.

   4. Click **Go**.

      The search result appears in rows grouped by customer types: organization, contact, and person.

   5. If the selected customer does not have an existing email address, select the radio button for the appropriate customer, select Associate to email and click **Go**.

      You return to the Compose page and the Customer container refreshes to display information for the selected customer.

   6. In the Customer container, click the Email Address icon.

      The Email Address page appears.

   7. In the New Address field, type the email address for the selected customer, and click **Add**.

   8. If you add more than one email address for the customer, select the one you want to use as the primary address, and click **Set as Primary**.

Disabling an Email Address

Use this procedure to disable a customer's email address.

Login

HTML Login URL

Responsibility

Email Center Agent Console

Email Center Message Component

Prerequisites

Steps

1. If you are replying to an email and you want to disable the customer's address:

    1. In the Customer container, click the email icon.

        The Email Address page appears.

    2. From the Email Address list, select the address you want to disable and click **Do Not Use**.

        The selected address is added to the Do Not Use email address area.

2. If you are typing a new email:

    1. In the Customer container, click the **Search** hyperlink.

    2. In the Customer Search area, select a radio button for the type of search criteria you want to use to find the desired customer.

    3. In the field corresponding to the radio button you selected in the previous step, type the search criteria.

        Email Center automatically treats all searching strings as a string appended by wildcard (%). For example, if you are searching someone with the last name of Smith, you could type "sm". All string/text searches must have at least two characters.

    4. Click **Go**.

        The search result appears in rows grouped by customer types: organization, contact, and person.

    5. In the Email column, click the Email Address icon.

        The Email Address page appears.

    6. From the Email Address list, select the email address you want to disable, and click **Do Not Use**.

        The selected address is added to the Do Not Use email address area.

Viewing Customer Details and Interactions

Use this procedure to view the details or interactions for a customer. Customer details include the address and relationships.

Login

HTML Login URL

Responsibility

Email Center Agent Console

Email Center Message Component

Prerequisites

Steps

1. Click the **Customer** tab

2. In the Customer Search area, select a radio button for the type of search criteria you want to use to find the desired customer.

3. In the field corresponding to the radio button you selected in the previous step, type the search criteria.

    Email Center automatically treats all searching strings as a string appended by wildcard (%). For example, if you are searching someone with the last name of Smith, you could type "sm". All string/text searches must have at least two characters.

4. Click **Go**.

    The search result appears in rows grouped by customer types: organization, contact, and person.

5. Click a hyperlinked customer name in either the organization, contact, or person table.

    An Overview page for the selected customer appears. This page displays the customer details, relationships, and interactions associated to the selected customer.

    > **Note:** To view additional items in the Relationships and Interactions sections, use the hyperlinks in the corresponding section.

6. If you want to search for a another customer, click **Search**.

7. If you want to return to the message composition window, click the Message tab.

8. If you want to associate this customer with the incoming email, click the Associate to message check box and click **Go**.

Managing Service Requests:

Topics include:

- Creating a Service Request, page 2-38

- Updating a Service Request, page 2-39

Creating a Service Request

Use this procedure to create a service request.

Login

HTML Login URL

Responsibility

Email Center Agent Console

Email Center Message Component

Prerequisites

Before you can create a service request, a valid customer must be selected and the customer's information must be displayed in the Customer bin.

Steps

1. In the Service Request container, click the **Create** hyperlink.

   The Create Service Request page appears. The customer information on the top of the page is displayed automatically.

2. Provide Contact Information as appropriate.

3. Provide Product Information as appropriate.

4. In the Problem Description area, type a summary of the issue and provide any necessary notes about the problem.

5. In the Issues area, provide detailed information about the issue.

   If you are creating a service request when replying to a message, the Summary field is automatically populated with the subject of the incoming message, otherwise a summary must be entered.

6. In the Contractual Coverage area, provide all information appropriate for the service request.

7. Click **Apply**.

   The service request number and summary are displayed in the Service Request container in the Message Component.

   The created service request is associated with the email via Oracle Customer Interaction History and can be viewed by the service agent from the Oracle TeleService application.

> **Note:** Once you create the service request, a link is made available to insert the template selected in the Default Service Request Status Template profile option.

Updating a Service Request

When a service request is created from within Email Center, the Service Request (SR) number is tagged to the outbound email. This SR number is automatically extracted from the customers reply and displayed in the Service Request container of the Message Component, when an acquires the email. You can then update the service request by following the steps in this topic.

Alternatively, if the SR number is not automatically identified due to a missing or malformed tag, you can manually enter the SR number after previewing the email, to update the SR and associate it with this email.

Use this procedure to update a service request.

Login

HTML Login URL

Responsibility

Email Center Agent Console

Email Center Message Component

Prerequisites

The SR number associated with the email must either be automatically identified by Oracle Email Center or manually entered.

Steps

1. In the Service Request container, enter the service request number and click the **Update** hyperlink. If the service request number is present, just click the **Update** hyperlink.

    The Update Service Request page appears, displaying the current service request for the selected customer.

2. Update the fields as needed.

3. When done, click **Apply**.

    The updates to the service request are saved.

Viewing the Original Message:

If you are replying to a message, use this procedure to view the original message.

Login

HTML Login URL

Responsibility

Email Center Agent Console

Email Center Message Component

Prerequisites

You must be in the Reply screen by either acquiring an email from the queue or opening an email from the inbox.

Steps

1. Scroll down to the bottom of the page.

2. Click **View Original Message**.

    The Original Message page appears.

3. If you want to add a note to the original message, click **Add Note**.

    Refer to the Adding Notes to a Message, page 2-27 topic for detailed steps about adding notes to email messages.

4. If you want to return to the reply, click **Return**.

    The Reply page appears.

5. If you want to cancel the reply, click **Cancel**.

    The message composition window closes. Your message is not saved. However, selected customer remains associated with the reply.

6. If you want to Transfer the message, click **Transfer**.

    The Transfer page appears. Refer to the Transferring a Message, page 2-41 topic for more detailed information on transferring a message.

7. If you want to Delete the message, click **Delete**.

Saving a Draft of a Reply:

Use this procedure to save a draft of a reply.

Login

HTML Login URL

Responsibility

Email Center Agent Console

Email Center Message Component

Prerequisites

You must be in the Reply screen by either acquiring an email from the queue or opening an email from the inbox.

Steps

1. From the Action list, select **Save**, and click **Go**.

   The reply is saved and the message composition window closes.

2. If you want to resume working on the reply, select the original message from your inbox.

Transferring a Message:

Use this procedure to transfer a message to another agent.

Login

HTML Login URL

Responsibility

Email Center Agent Console

Email Center Message Component

Prerequisites

You must be in the Reply screen by either acquiring an email from the queue or opening an email from the inbox.

Steps

1. If you are transferring a message from the Inbox page, in the Select column, select the message you want to transfer and click **Transfer**.

2. If you are transferring a message from the View Original Message page, click **Transfer**.

3. If you are transferring a message from the Reply page:

   1. From the Action list, select **Transfer**.

   2. Click **Go**.

      The Transfer page appears.

4. If you want to return to the message composition window, click **Cancel**.

5. In the Transfer Target area, use the search feature to locate the agent or supervisor to whom you want to transfer the message.

6. In the Select column, click the radio button for the agent or supervisor to whom you want to transfer the message.

7. Optionally, from the Message Priority list, you can select a **High** priority if you are transferring the message to another agent, or you can select either **Escalated** or **High** priority if you are transferring the message to a supervisor

8. From the list in the Transfer Reason field, select a reason for the transfer.

9. Click **Apply**.

   The message is removed from your inbox and transferred to the inbox of the selected agent or supervisor.

   > **Note:** You can also add a note providing further explanation for the transfer.

Deleting a Message:

Use the following procedure to delete a message.

Login

HTML Login URL

Responsibility

Email Center Agent Console

Email Center Message Component

Prerequisites

Steps

1. If you are deleting a message from the Inbox page, in the Select column, select the message you want to delete and click **Delete**.

2. If you are deleting a message from the View Original Message page, click **Delete**.

3. If you are deleting a message from the Reply page:

   1. From the Action list, select **Delete**.

   2. From the Reason list, select the appropriate reason you are deleting the message.

   3. Click **Go**.

      The message composition window closes. The message is removed from your inbox.

Rerouting or Requeueing a Message:

Once an inbound email message is in your Inbox, you can use the Email Center Message Component to reroute the message. Rerouting a message involves placing the message back into another classification queue.

This is very useful when you acquire an email and are not the subject matter expert, and want redirect the email to another agent.

Use the steps below to reroute an email message.

Login

HTML Login URL

Responsibility

Email Center Agent Console

Email Center Message Component

Prerequisites

Steps

1. From the list in the Action field, select **Reroute** and click **Go**.

   The Reroute page appears.

2. To reroute the message:

   1. From the account field, select the account in which you believe the message belongs (if different from the one listed in the Inbound Message Details area).

   2. From the list in the Classification field, select the classification you believe the message belongs in. For a reroute to occur, you MUST select a different classification than the one listed in the Inbound Message Details area. Selecting the same classification will result in the message being requeued.

   3. From the list in the Reroute Reason field, select the appropriate reason for rerouting the message.

3. Click **Apply**.

   The reply page closes and the message is rerouted or requeued.

Escalating a Message:

Use the steps below to escalate a message to a supervisor.

Login

HTML Login URL

Responsibility

Email Center Agent Console

Email Center Message Component

Prerequisites

Steps

1. If you are transferring a message from the Inbox page, in the Select column, select the message you want to transfer and click **Transfer**.

2. If you are transferring a message from the View Original Message page, click **Transfer**.

3. If you are transferring a message from the Reply page:

    1. From the Action list, select **Transfer**.

    2. Click **Go**.

        The Transfer page appears.

4. From the list in the Search field, select **Supervisor** and click **Go**.

    The Transfer page refreshes to display a list of all supervisors.

5. In the Select column, select the supervisor to whom you want to escalate the message.

6. From the list in the Message Priority field, select **Escalated**.

7. From the list in the transfer Reason field, select the appropriate reason for escalating the message.

8. Click **Apply**.

    The transfer page closes and the message is escalated to the selected supervisor.

Setting Message Preferences:

Use the steps below to set your message preferences.

Login

HTML Login URL

Responsibility

Email Center Agent Console

Email Center Message Component

Prerequisites

Steps

1. From the Message Component Reply or Compose page, click the **Message Preferences** hyperlink.

   The Message Preferences page appears.

2. From the Default Account list, select the account you want to use as your default account.

   The account selected in the Default Account profile option is used in following scenarios:

   1. When an agent clicks the **Messages** tab, the inbox for the default account selected here is displayed.

   2. When the agent clicks **Messages > Search**, the Account drop-down list displays the default account selected here.

   3. When you click the **Customer** tab in the Agent console, then search for and select a customer to "Create a Message", the "From Account" in the Compose window will be populated with the default account selected here.

3. Select the **Automatically add primary address to message when selecting a customer** option if you want to automatically add the primary address of the customer to the To list.

   If you do not select this option, the customer's email address is not automatically added to the To list. In this case you will have to type or copy-and-paste the address in the To field.

4. In the Number of Editor Rows to Display field, type the number of rows you want displayed.

   This number controls the size of the editor (text entry box) in the Reply/Compose page.

5. Select the Preferred Editor option to control whether you will use rich text or plain text.

6. From the Viewing Time Zone list, select the time zone you want.

   The time zone selected here affects the specific time zone displayed in the "Date" column on your My Inbox page.

7. Click **Update**.

8. Click **Finished**.

Viewing an Interaction Thread:

Use the steps below to view an interaction thread from the Reply page.

Login

HTML Login URL

Responsibility

Email Center Agent Console

Email Center Message Component

Prerequisites

Steps

1. If you want to view interaction threads from the Reply page, click the **References** hyperlink.

2. If you want to view interaction threads from the Customer Overview page, in the Threads column, click the icon for the appropriate message interaction.

   All the related interactions or interactions linked by a "thread" are displayed. The interactions are linked using the parent-child relationship model provided by Oracle Customer Interaction History.

   Every outbound email is tagged with the interaction ID which is then extracted from the customers reply. This extracted (old) interaction is then linked to new interaction via the Oracle Customer Interaction History schema forming a thread.

   The interactions are displayed in the ascending order of the date such that the oldest interaction (root) is on the top.

   The interaction that you were viewing in the Customer Overview page prior to navigating to the threads view, appears in bold type.

3. You can use the Filter by list to filter your results by:

   • Contact

   • Customer

   • Any

4. Optionally, if you want to view the original message, click the appropriate hyperlinked subject heading from the Reference Data column.

Knowledge Base Repositories

Oracle Email Center provides access to two knowledge base repositories, namely, Marketing Encyclopedia System (MES) and Knowledge Management (KM). While you can search for documents using keywords in either of the above repositories, you can only browse through the MES repository.

MES enables administrators to create a hierarchy of categories and publish documents within a specific category.

The MES knowledge base is a repository for files, such as email templates and informational documents. You can insert a file into or attach a file to a message.

Use the Categories hyperlink on the side panel to browse files in the MES knowledge base.

Browsing Files in the MES Knowledge Base:

Use this procedure to view files in the MES knowledge base repository.

Login

HTML Login URL

Responsibility

Email Center Agent Console

Email Center Message Component

Email Center Supervisor

Prerequisites

Steps

1. If you are logging in as an Email Center agent:

    1. From the Message Component, click the **Knowledge Base** tab.

    2. Click the **Categories** subtab.

        The Categories page appears.

    3. Click the category or the subcategory hyperlink.

        A page appears. The page lists hyperlink to any subcategories or files.

        > **Note:** It is only possible to view text and HTML documents.

    4. If you want to view a file, click the title hyperlink.

The file appears.

2. If you are logging in as an Email Center supervisor:

   1. Click the **Supervisor** tab.

   2. Click the **Knowledge Base** subtab.

   3. From the side panel, click **Browse**.

      The Browse Documents page appears.

   4. In the MES Category column, expand the appropriate category to reveal any sub categories under it.

   5. In the View column, click the view icon for the appropriate document category or sub category.

      A page appears. The page lists hyperlink to any subcategories or files.

      > **Note:** It is only possible to view text and HTML documents.

3. If you want to view a file, click the title hyperlink.

   The file appears.

Inserting a File from the Knowledge Base into a Message:

Use the following procedure to insert file from the knowledge base into a message.

Login

HTML Login URL

Responsibility

Email Center Agent Console

Email Center Message Component

Email Center Supervisor

Prerequisites

Steps

1. Browse or search for a file in the knowledge base.

   > **Note:** It is only possible to view text and HTML documents.

2. Click the title hyperlink.

    The file appears.

3. Type information in all merge fields. Mandatory merge fields are marked with an asterisk.

4. Optionally, click **Preview** to preview the document.

5. Click **Insert**.

    The page in the Message tab appears. The document is in the body of the message.

Attaching a File from the Knowledge Base to a Message:

Use the following procedure to insert or attach a file from the knowledge base.

Login

HTML Login URL

Responsibility

Email Center Agent Console

Email Center Message Component

Email Center Supervisor

Prerequisites

Steps

1. Browse or search for a file in the knowledge base.

    > **Note:** While a file/document of any type can be attached to a message, it is only possible to preview the contents of text or HTML documents.

2. Click the title hyperlink.

    The file appears.

3. Type information in all required fields.

4. Optionally, click **Preview** to preview the document

5. Click **Attach**.

    The page in the Message tab appears. The file is listed in the Attachments section, with the title of the document displayed as a hyperlink.

Knowledge Base Search

The knowledge base is a repository for files, such as email templates and informational documents.

Use the Search subtab to search for files in the knowledge base.

Searching for a Document in the Knowledge Base:

Use this procedure to search for files in the MES knowledge base repository.

Login

HTML Login URL

Responsibility

Email Center Agent Console

Email Center Message Component

Email Center Supervisor

Prerequisites

Steps

1. If you are logging in as an Email Center agent:

    1. From the Message Component, click the **Knowledge Base** tab.

    2. Click the **Search** subtab.

       The Knowledge Base Search page appears.

    3. In the Enter Search Criteria fields, select the repository you want to search, type your search criteria, and click **Go**.

       The Document Search Results area refreshes to display all documents in the selected repository that match your search criteria.

    4. If you want to view a file, click the title hyperlink.

       The file appears.

2. If you are logging in as an Email Center supervisor:

    1. Click the **Supervisor** tab.

    2. Click the **Knowledge Base** subtab.

    3. From the side panel, click **Search**.

The Knowledge Base Search page appears.

4. In the Enter Search Criteria field, type your search criteria and click **Go**.

   The Document Search Results area refreshes to display all documents in the selected repository that match your search criteria.

5. If you want to view a file, click the title hyperlink.

   The file appears.

Email Center Customer Search

Oracle Email Center adopts the common Trading Community Architecture (TCA) model in which customers can be an organization, an individual person, or a person representing an organization as either a contact or an employee. Use the Search subtab to search for a customer. You can view the details for a customer or compose a message.

Searching For a Customer:

Use the following procedure to search for a customer.

Login

HTML Login URL

Responsibility

Email Center Agent Console

Email Center Message Component

Prerequisites

Steps

1. Click the **Customer** tab.

2. In the Customer Search container, click the appropriate radio button and type your search criteria.

   Email Center automatically treats all searching strings as a string appended by wildcard (%). For example, if you are searching someone with the last name of Smith, you could type "sm". All string/text searches must have at least two characters.

3. If you want to search for customers, click **Go**.

   The Customer Search results appear.

4. You can use the **First**, **Previous**, **Next**, and **Last** hyperlinks to navigate through the

search results.

Viewing Customer Details:

Use the following procedure to view the details for a customer. Customer details include the complete name, email addresses, phone numbers, and primary address.

Login

HTML Login URL

Responsibility

Email Center Agent Console

Email Center Message Component

Prerequisites

Steps

1. Click the **Customer** tab.

2. In the Customer Search container, click the appropriate radio button and type the search criteria.

   Email Center automatically treats all searching strings as a string appended by wildcard (%). For example, if you are searching someone with the last name of Smith, you could type "sm". All string/text searches must have at least two characters.

3. Click **Go**.

   The Customer Search results appear.

4. You can use the **First**, **Previous**, **Next**, and **Last** hyperlinks to navigate through the search results.

5. Click the name hyperlink for the customer for whom you want to view details.

   The Customer Overview page appears.

6. To view additional email addresses associated with this customer click the icon displayed next to the Email Address field.

7. In the Interactions area, you can use the Filter by Contact list to show only interactions with a particular contact.

Adding Email Addresses to a Customer Record:

Use this procedure to add a new or additional email address to an existing customer

record.

Login

HTML Login URL

Responsibility

Email Center Agent Console

Email Center Message Component

Prerequisites

Steps

1. Click the **Customer** tab

2. If your are typing a new email:

    1. In the Customer Search area, select a radio button for the type of search criteria you want to use to find the desired customer.

    2. In the field corresponding to the radio button you selected in the previous step, type the search criteria.

        Email Center automatically treats all searching strings as a string appended by wildcard (%). For example, if you are searching someone with the last name of Smith, you could type "sm". All string/text searches must have at least two characters.

    3. Click **Go**.

        The search result appears in rows grouped by customer types: organization, contact, and person.

    4. If the selected customer does not have an existing email address, select the radio button for the appropriate customer, select Associate to email and click **Go**.

        You return to the Compose page and the Customer container refreshes to display information for the selected customer.

    5. In the Customer container, click the Email Address icon.

        The Email Address page appears.

    6. In the New Address field, type the email address for the selected customer, and click **Add**.

    7. If you add more than one email address for the customer, select the one you want to use as the primary address, and click **Set as Primary**.

3. If you are replying to an email:

   1. In the Customer container, click the Email Address icon.

      The Email Address page appears.

   2. In the New Address field, type the email address for the selected customer, and click **Add**.

   3. If this is an additional address for the customer, select the one you want to use as the primary address, and click **Set as Primary**.

4. Click **Close**.

Setting an Email Address as the Primary Address:

Use this procedure to select an email address to be used as the primary address for a customer.

Login

HTML Login URL

Responsibility

Email Center Agent Console

Email Center Message Component

Prerequisites

Steps

1. If you are replying to an email and you want to set the default address as the primary address, in the Customer container, click the **Make To Address Primary** hyperlink.

2. If you are replying to an email and you want to select a different address than the default as the primary address:

   1. In the Customer container, click the email icon.

      The Email Address page appears.

   2. From the Email Address list, select the address you want to make the primary address and click **Set as Primary**.

3. If you are typing a new email:

   1. In the Customer container, click the **Search** hyperlink.

2. In the Customer Search area, select a radio button for the type of search criteria you want to use to find the desired customer.

3. In the field corresponding to the radio button you selected in the previous step, type the search criteria.

   Email Center automatically treats all searching strings as a string appended by wildcard (%). For example, if you are searching someone with the last name of Smith, you could type "sm". All string/text searches must have at least two characters.

4. Click **Go**.

   The search result appears in rows grouped by customer types: organization, contact, and person.

5. If the selected customer does not have an existing email address, select the radio button for the appropriate customer, select Associate to email and click **Go**.

   You return to the Compose page and the Customer container refreshes to display information for the selected customer.

6. In the Customer container, click the Email Address icon.

   The Email Address page appears.

7. In the New Address field, type the email address for the selected customer, and click **Add**.

8. If you add more than one email address for the customer, select the one you want to use as the primary address, and click **Set as Primary**.

Disabling an Email Address:

Use this procedure to disable a customer's email address.

Login

HTML Login URL

Responsibility

Email Center Agent Console

Email Center Message Component

Prerequisites

Steps

1. If you are replying to an email and you want to disable the customer's address:

   1. In the Customer container, click the email icon.

      The Email Address page appears.

   2. From the Email Address list, select the address you want to disable and click **Do Not Use**.

      The selected address is added to the Do Not Use email address area.

2. If you are typing a new email:

   1. In the Customer container, click the **Search** hyperlink.

   2. In the Customer Search area, select a radio button for the type of search criteria you want to use to find the desired customer.

   3. In the field corresponding to the radio button you selected in the previous step, type the search criteria.

      Email Center automatically treats all searching strings as a string appended by wildcard (%). For example, if you are searching someone with the last name of Smith, you could type "sm". All string/text searches must have at least two characters.

   4. Click **Go**.

      The search result appears in rows grouped by customer types: organization, contact, and person.

   5. In the Email column, click the Email Address icon.

      The Email Address page appears.

   6. From the Email Address list, select the email address you want to disable, and click **Do Not Use**.

      The selected address is added to the Do Not Use email address area.

Composing a Message:

Use the following procedure to compose a message after a customer search.

Login

HTML Login URL

Responsibility

Email Center Agent Console

Email Center Message Component

Prerequisites

Steps

1. Click the **Customer** tab.

2. In the Customer Search container, click the appropriate radio button and type the search criteria.

   Email Center automatically treats all searching strings as a string appended by wildcard (%). For example, if you are searching someone with the last name of Smith, you could type "sm". All string/text searches must have at least two characters.

3. Click **Go**.

   The Customer Search results appear.

4. Select the radio button for the appropriate customer.

5. From the list at the top of the container, select **Create a message**, and click **Go**.

   The Compose page appears in a new browser window.

Viewing an Interaction Thread:

Use the steps below to view an interaction thread from the Customer tab.

Login

HTML Login URL

Responsibility

Email Center Agent Console

Email Center Message Component

Prerequisites

Steps

1. To view Interaction Threads from the Customer tab:

   1. Click the **Customer** tab.

   2. In the Customer Search container, click the appropriate radio button and type the search criteria.

   3. Email Center automatically treats all searching strings as a string appended by wildcard (%). For example, if you are searching someone with the last name of

Smith, you could type "sm". All string/text searches must have at least two characters.

4. Click **Go**.

   The Customer Search results appear.

5. Click the hyperlinked name for the appropriate customer.

   An overview page for the selected customer appears.

6. You can use the Filter by Contact list to show only interactions with a particular contact.

7. In the Threads column, click the icon for the appropriate message interaction.

   The Interaction Threads page appears, displaying a historical list of all actions for the selected interaction.

   Interactions are grouped together by interaction number. There can be multiple actions associated with a single interaction number.

8. Optionally, if you want to view the original message, click the appropriate hyperlinked subject heading from the Reference Data column.

2. To view interaction threads from the Reply or Original Message page, click the **References** hyperlink.

   The Interaction Threads page appears.

Managing Accounts

The Accounts subtab provides you with a variety of tools to better manage Email Center accounts. From this tab you can view a summary of the messages for any account or classification, you can manage messages in the queue, and messages in agents' inboxes.

You can click **Refresh** (located on the upper right hand side of the Current Email Volume Activity container to ensure all the information displayed in it is current.

The Current Email Volume Activity container has the following columns:

- **Focus** - By default, the Current Email Volume Activity container displays information for every account/classification assigned to you. The Focus icon allows you to narrow your view down to a particular account. You can click the **All Accounts** hyperlink displayed at the top of the container to revert back to the default view of all accounts.

- **Account/Classification** - This column displays the name of each account and classification to which you are assigned. The default view is at the account level;

however, if there are multiple classifications under a particular account, you can expand the view by clicking the expand arrow.

- **Emails in Queue** - The Emails in Queue column displays the number of emails that are currently waiting in the queue. Each of these numbers is a hyperlink that, when clicked, takes you to the Queued Messages page for the particular account/classification.

- **Emails in Inbox -** The Emails in Inbox column displays the number of emails that are currently waiting in the agent's inbox.

- **Average Age in Queue -** Average Age in Queue displays the average amount of time an email has been waiting in the queue.

- **Average Age in Inbox -** Average Age in Inbox displays the average amount of time an email has been waiting in the agent's Inbox.

- **Longest Wait in Queue** - This column displays the amount of time the oldest message has been waiting in the queue.

- **Longest Wait in Inbox -** This column displays the amount of time the oldest message has been waiting in the agent's Inbox.

- **Agents Assigned** - This column displays a count for the total number of agents assigned to a particular account. Each of these numbers is a hyperlink that, when clicked, takes you to the Agents and Accounts Assignment page.

Searching Queued Messages:

Use the steps below to search for queued messages.

Login

HTML Login URL

Responsibility

Email Center Supervisor

Prerequisites

Steps

1. Click the **Supervisor** tab.

   The Supervisor console appears.

2. Click the **Account** subtab.

3. From the side panel, click **Queue**.

4. From the list in the account field, select the email account for which you want to search messages.

5. Click **Go**.

   The Queued Messages page refreshes to display all of the messages for the selected email account.

6. Alternately, you can use the **Advanced Search** hyperlink to narrow down your search parameters.

   The Advanced search function provides the following search parameters:

   • **Account** (drop-down list)- list of available email accounts. This search parameter is required. That is, indicate an email account; all other search parameters are optional.

   • **Classification** (drop-down list)- list of available classifications for selected email account

   • **Subject** (text field)- subject of email

   • **Customer** (lookup field)- Customer Name who sent email (if successfully identified by Email Center processing). Customer Lookup should be identical to the one currently offered in Site Profile Options page (Default Customer Number field), with the only difference that the value returned is Customer Name, not Customer Number.

   • **Sender's Email Address** (text field) - email address from sender (does not include email aliases).

   • **Sent Date From** (date lookup)- Sent date (as stamped in incoming message)

   • **Sent Date To** (date lookup) - Sent date (as stamped in incoming message). Can only be filled when a Sent Date From is specified. Default to SYSDATE if Sent Date From is specified and 'Sent Date To' is left blank.

   • **Resource Group** (drop-down list) - The Resource Group list is dependent on the account selected.

     This is a very useful tool to use when you have different groups of individuals associated with each resource group. It allows you to identify how many queued messages a particular group has available or if there is a backlog for a particular resource group. Also if a resource group has been end dated, this is an effective way of identifying all queued messages associated with that resource group. You can then reassign the emails as appropriate.

     Note: If you select either:

Queued Messages Summary

After a basic or advanced search is executed, the search results are displayed in a search results table that contains the following columns:

- **From -** Sender's email address. If available, display sender's name instead of email address.

- **Subject -** Email's subject. You can preview email by clicking on the subject's link.

- **Classification -** Email's classification as assigned by Email Center processing.

- **Customer -** If the customer who sent the email can be identified by Email Center processing, then Customer's Name will be displayed. If no customers were identified by Email Center, the column value is left blank. If multiple matches were identified, column value is also left blank.

- **Resource Group -** Lists the Resource Group to which the message has been routed. "All Groups" means the message is not routed to a specific group. It is opened up to All Groups.

- **Date -** Sent Date as marked in incoming email. By default, search results will be sorted by this column (oldest emails displayed first).

Previewing Queued Messages:

You can preview any queued message on the Queued Messages page by clicking the hyperlinked subject line in the Subject column. When you click the subject hyperlink, the Email Center message component opens in a separate window, displaying the message in preview mode. At this point, you can return to the search result summary page by clicking **Close**, or you can reply to the email by clicking **Reply**.

Replying to Queued Messages:

After previewing a queued message, you may decide to reply to it. To do so, you must click **Reply**. Upon clicking **Reply**:

- The supervisor takes ownership of the email as it is effectively removed from the classification folder to the supervisor's inbox folder.

- A new interaction is opened.

- The display of inbound message switches from preview mode to reply mode (standard Email Center Message Component's Reply page). The supervisor can now proceed with replying to, deleting, transferring, rerouting or saving the message.

When you are composing a reply to an incoming email message you can do the following:

- If you want to view a list of all the suggested response documents with their scores, other than the ones displayed in the Top Suggested Response Documents container, click the **More** hyperlink.

  The message intents (and their scores) pertaining to the inbound message and the list of suggested response documents (and their scores) for each intent are displayed on the left hand side of the page that displays the contents of the suggested response documents. The scores listed with the documents indicate the relative level of confidence that the document matches the intent of the email message.

  You should select a suggested response document with a high confidence score to use in composing a response message. However, you should read the email message to ensure that you select the most appropriate suggested response document.

- If you want to insert a suggested response document without viewing the contents, click the Insert hyperlink under the name of the suggested response document that you want to insert.

- If you want to attach a suggested response document, click the Attach hyperlink under the name of the suggested response document that you want to attach.

- If you want to view the contents of a suggested response document, click the document title hyperlink of the suggested response document you want to view.

  After you select a suggested response document, if the document contains merge fields, field input boxes are displayed at the top of the page for each of the merge fields contained in the document. If Oracle Email Center is able to automatically populate the values of the field input boxes with information extracted from the email, the values for the merge fields appear in the input boxes. However, if the merge fields values cannot be identified automatically, then you have to type the values into the merge fields.

The following options are available:

- **Preview:** Allows you to view the document with the merge fields populated.

- **Insert:** Inserts the selected document into the response and displays a confirmation.

- **Attach:** Attaches the selected document into the response and displays a confirmation.

Assigning Queued Messages to an Agent:

Supervisors can reduce email backlog, expedite the response of specific messages sitting in the queue, or balance the agent's workload by assigning queued emails to agents.

Use the steps below to assign queued messages to agents.

Login

HTML Login URL

Responsibility

Email Center Supervisor

Prerequisites

Steps

1.   Click the **Supervisor** tab.

The Supervisor console appears.

2.   Click the **Account** subtab.

3.   From the side panel under Messages, click **Queue**.

4.   From the Account list, select the account from which you want to assign a queued message.

5.   Click **Go**.

The Queued Messages page refreshes to display a list of all the emails in the queue for the selected account.

6.   In the Select column, select the message you want to assign, or click the **Select All** hyperlink to select ALL messages in the queue.

7.   Click **Assign**.

The Assign Message(s) to Agent page appears.

8.   Select an agent to whom you want to assign queued emails to (you can only select one agent at a time). You can use the following two pieces of information about the agents to help select the appropriate one(s):

   1.   **Email Count** - # of unanswered emails sitting in the agent's inbox across accounts.

   2.   **Last Login Time** - Indicates Date/Time of agent's last login to Email Center Agent Console.

> **Note:** Only agents assigned to the email account from which emails are being pushed from are eligible assignees.

> **Note:** By default, the Assign Message(s) page is sorted alphabetically by Agent's Last Name. All three columns (Agent, Email Count, and Last Login Time) are sortable.

9. Click **Assign**.

    At this point:

    - The selected emails are effectively removed from the queue and moved to the agent assignee's inbox folder.

    - An Assign Confirmation Message is displayed at the top of the page.

Rerouting Queued Messages to a Group:

You can now search for and reroute queued messages to a resource group.

For implementations with different groups of individuals associated to each resource group, this is a very useful tool for identifying:

- how many queued messages a particular group has available

- if there is a backlog for a particular resource group

- all queued messages associated with an end dated resource group, thereby allowing a supervisor to reassign those messages to another group.

The list of resource groups to which you can assign messages is dependent on the account you selected.

Login

HTML Login URL

Responsibility

Email Center Supervisor

Prerequisites

Steps

1. Click the **Supervisor** tab.

    The Supervisor console appears.

2. Click the **Account** subtab.

3. From the side panel under Messages, click **Queue**.

4. From the Account list, select the account from which you want to reroute a queued message.

5. Click **Go**.

   The Queued Messages page refreshes to display a list of all the emails in the queue for the selected account.

6. In the Select column, select the box corresponding to the message you want to reroute.

7. Click **Reroute**.

   The Assign Message(s) to Agent Group page appears.

8. Select a resource group to whom you want to assign queued emails to (you can only select one group at a time). You can use the following two pieces of information about the agents to help select the appropriate one(s):

   1. **Email Count** - Indicates the number of queued messages in the Inboxes of the agents assigned to that resource group.

   2. **Assigned Agents** - Indicates number of agents assigned to the resource group.

      > **Note:** By default, the Assign Message(s) to Agent Groups page is sorted alphabetically by resource group name. All three columns (Resource Group, Email Count, and Assigned Agents) are sortable.

9. Click **Assign**.

   At this point:

   - The message is still in the queue, but assigned only to the select resource group. Agents in other resource group won't be able to see it or fetch it from the queue.

   - An Assign Confirmation Message is displayed at the top of the page.

Deleting Queued Messages:

To clean up unwanted emails and save agent's time, you can delete queued messages. From the queued messages summary, you can select one or more messages and click **Delete**.

Use the steps below to delete a queued message.

Login

HTML Login URL

Responsibility

Email Center Supervisor

Prerequisites

Steps

1. Click the **Supervisor** tab.

   The Supervisor console appears.

2. Click the **Account** subtab.

3. From the side panel, click **Queue**.

4. From the Account list, select the account from which you want to delete a queued message.

5. Click **Go**.

   The Queued Messages page refreshes to display a list of all the emails in the queue for the selected account.

6. In the Select column, select the box corresponding to the message you want to delete.

7. Click **Delete**.

   The Delete Confirmation page appears.

8. From the Reason Code list, select an appropriate reason for why you are deleting the message.

9. Click **Apply**.

   The Queued Messages page appears and displays a confirmation message stating that the delete was successful.

   Upon clicking **Delete**:

   - The selected emails are effectively removed from the queue (account's classification folder) and moved to the account's delete folder.

   - An interaction is created.

   - A Delete Confirmation message appears at top of page.

Transferring Messages From an Agent's Inbox to Another Agent:

Use the steps below to assign messages in one agent's inbox to the inbox of another

agent.

Login

HTML Login URL

Responsibility

Email Center Supervisor

Prerequisites

Steps

1. Click the **Supervisor** tab.

    The Supervisor console appears.

2. Click the **Account** subtab.

3. From the side panel, click **Inbox**.

    The Inbox Messages page appears.

4. From the Account list, select the account from which you want to assign a message.

5. Click **Go**.

    The Inbox Messages page refreshes to display a list of all the emails in the agents Inbox(es) for the selected account.

6. In the select column, select the email message that you want to transfer to another agent.

7. Click **Transfer**.

    The Transfer page appears.

8. Use the search fields to locate the agent to whom you want to transfer the message.

9. From the Select column, select the agent to whom you want to transfer the message.

10. Click **Apply**.

    The Inbox Messages page appears and displays a confirmation message stating that the message transfer was successful.

Requeueing Messages From an Agents Inbox to a Group:

Use the steps below to assign messages from one agent's inbox to a resource group of agents.

Login

HTML Login URL

Responsibility

Email Center Supervisor

Prerequisites

Steps

1.   Click the **Supervisor** tab.

     The Supervisor console appears.

2.   Click the **Account** subtab.

3.   From the side panel, click **Messages > Inbox**.

     The Inbox Messages page appears.

4.   From the Account list, select the account from which you want to assign a message.

5.   Click **Go**.

     The Inbox Messages page refreshes to display a list of all the emails in the agents Inbox(es) for the selected account.

6.   In the select column, select the email message that you want to requeue to a resource group.

7.   Click **Requeue**.

     The Requeue page appears.

8.   If you want to requeue the message back to the same resource group, select the **Same Resource Group** option.

9.   If you want to requeue the message to a different resource group of agents, select the Different Resource Group option, then from the Select column, select the resource group to which you want to requeue the message.

10. Click **Apply**.

     The Inbox Messages page appears and displays a confirmation message stating that the message requeue was successful.

Deleting Messages From an Agent's Inbox:

Use the steps below to delete messages from an agent's inbox.

Login

HTML Login URL

Responsibility

Email Center Supervisor

Prerequisites

Steps

1. Click the **Supervisor** tab.

   The Supervisor console appears.

2. Click the **Account** subtab.

3. From the side panel, click **Inbox**.

   The Inbox Messages page appears.

4. From the Account list, select the appropriate account.

5. Click **Go**.

   The Inbox Messages page refreshes to display a list of all the emails in the agents Inbox(es) for the selected account.

6. From the Select column, select the message you want to delete.

7. Click **Delete**.

   The Delete Confirmation page appears.

8. From the Reason Code list, select an appropriate reason for why you are deleting the message.

9. Click **Apply**.

   The Inbox Messages page appears and displays a confirmation message stating that the delete was successful.

Assigning Agents to Email Accounts:

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

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

Login

HTML Login URL

Responsibility

Email Center Supervisor

Prerequisites

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

Steps

1. Click the **Supervisor** tab.

2. In the side panel, click **Agents**.

    The Agents and Accounts Assignment page appears.

3. From the list in the Assign field, select **Agents to Accounts** and click **Go**.

4. From the list in the Email Account field, select the email account to which you want to assign an agent and click **Go.**

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

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

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

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

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

Assigning Email Accounts to Agents:

Use this procedure to assign one or more email accounts to an Email Center agent from the Supervisor Console.

Login

HTML Login URL

Responsibility

Email Center Supervisor

Prerequisites

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

Steps

1. Click the **Supervisor** tab.

2. In the side panel, click **Agents**.

   The Agents and Accounts Assignment page appears.

3. From the list in the Assign field, select **Accounts to Agents** and click **Go**.

4. Enter the search criteria to search for the agent(s) you want to assign to an email account.

   1. If you want to search for an agent using the agent's user name, in the Agent User Name field, type the name of the agent.

   2. If you want to search for an agent using the first name of the agent, in the First Name field, type the first name of the agent.

   3. If you want to search for an agent using the last name (family name) of the agent, in the Last Name field, type the last name of the agent.

   4. If you want to search for an agent assigned to a specific resource group, from the Resource Group list, select the resource group.

   5. If you want to search for an agent based on their assigned Email Center resource roles, from the Resource Role list, select the resource role.

5. Click **Search**.

   The agent search results appears listing the agents which were found to match the given search criteria.

6. In the Select column, select the box next to the agent user name of the user you want to assign to email accounts.

7. Click **Assign Email Account**.

   The Assign Email Accounts to Agents page appears with the list of available email accounts displayed in the Account Name column. The Assigned Email Account list displays the list of email accounts that were previously assigned to the agent.

8. To assign selected email accounts to an agent, select their corresponding Account Access box for account access and Queue Access box for queue access.

9. To save your work and assign the email accounts to the agent, click **Apply**.

Managing Agents

The Agents subtab on the Supervisor console provides you with an agent summary view, a tool for requeueing or transferring all messages from an agent's inbox or all inboxes for an agent, a means of assigning messages from one agent's inbox to the Inbox of another agent or to a resource group of agents, a means to assign agents to accounts or accounts to agents, and manage individual agent inbox(es).

Viewing the Agent Summary:

Use the steps below to view a summary of agents and their inbox(es).

Login

HTML Login URL

Responsibility

Email Center Supervisor

Prerequisites

Steps

1. Click the **Supervisor** tab.

2. Click the **Agent** subtab.

3. From the side panel, click **Summary**.

   The Agent Summary page appears, displaying a summary view table of agents and their account inboxes.

4. To focus on an individual agent, in the Focus column, click the focus icon.

   The Agent Summary page refreshes to only display information about the selected agent.

5. To expand the view to see all inboxes for a particular agent, in the Agent/Account column, click the expand icon.

   The Agent Summary page refreshes, and the summary view table expands to reveal all inboxes for the selected agent.

6. To view a list of the accounts assigned to an agent, from the Accounts Assigned column, click the hyperlinked number corresponding to the appropriate agent.

   The Agents and Accounts Assignment page appears.

Requeueing All Messages In an Agent's Inbox:

Use the steps below to requeue all messages from an agent's inbox.

Login

HTML Login URL

Responsibility

Email Center Supervisor

Prerequisites

Steps

1. Click the **Supervisor** tab.

2. Click the **Agent** subtab.

3. From the side panel, click **Summary**.

   The Agent Summary page appears, displaying a summary view table of agents and their account inboxes.

4. To requeue all messages from ALL of an agent's inboxes:

   1. In the Requeue All column, click the Requeue icon corresponding to the appropriate agent.

      The Requeue page appears.

   2. From the Reason Code list, select a reason why you are requeueing the messages.

   3. Click **Apply**.

      The Agent Summary page appears and you receive a confirmation message stating the requeue was successful.

5. To requeue messages from a particular inbox:

   1. In the Agent/Account column, click the expand icon.

      The Agent Summary page refreshes, and the summary view table expands to reveal all inboxes for the selected agent.

   2. In the Requeue All column, click the Requeue icon corresponding to the appropriate account/inbox from which you want to requeue messages.

      The Requeue page appears.

3. From the Reason Code list, select a reason why you are requeueing the messages.

4. Click **Apply**.

   The Agent Summary page appears and you receive a confirmation message stating the requeue was successful.

Transferring All Messages in an Agent's Inbox:

> **Note:** The Transfer All feature only works at the account level. You cannot transfer all messages from all agent inboxes at this time. To use this feature, expand the agent.

Use the steps below to transfer all messages from an agent's inbox.

Login

HTML Login URL

Responsibility

Email Center Supervisor

Prerequisites

Steps

1. Click the **Supervisor** tab.

2. Click the **Agent** subtab.

3. From the side panel, click **Summary**.

   The Agent Summary page appears, displaying a summary view table of agents and their account inboxes.

4. In the Agent/Account column, click the expand icon.

   The Agent Summary page refreshes, and the summary view table expands to reveal all inboxes for the selected agent.

5. In the Transfer All column, click the Transfer icon corresponding to the appropriate account/inbox from which you want to transfer messages.

   The Transfer page appears.

6. Use the search functionality to search for the agent to whom you want to transfer the messages.

7. From the Select column, select the agent to whom you want to transfer the messages.

8. Click **Apply**.

   The Agent Summary page appears and you receive a confirmation message stating the transfer was successful.

Transferring Messages From an Agent's Inbox to Another Agent:

Use the steps below to assign messages in one agent's inbox to the inbox of another agent.

Login

HTML Login URL

Responsibility

Email Center Supervisor

Prerequisites

Steps

1. Click the **Supervisor** tab.

   The Supervisor console appears.

2. Click the **Agent** subtab.

3. From the side panel, click **Summary**.

   The Agent Summary page appears.

4. In the Agent/Account column, click the expand icon corresponding to the appropriate agent.

   The Agent Summary page refreshes, and the summary view table expands to reveal all inboxes for the selected agent.

5. From the Emails In Inbox column, click the hyperlinked number for the appropriate account inbox.

   The Agent Inbox page appears, displaying a summary view table of all the email messages in the selected agent account inbox.

6. In the select column, select the message you want to assign to another agent, and click **Transfer**.

   The Transfer page appears.

7. Use the search functionality to search for the agent to whom you want to transfer the messages.

8. From the Select column, select the agent to whom you want to transfer the messages.

9. Click **Apply**.

   The Agent Inbox page appears and you receive a confirmation message stating the transfer was successful.

Requeueing Messages From an Agent's Inbox to a Group:

Use the steps below to assign messages from one agent's inbox to a resource group of agents.

Login

HTML Login URL

Responsibility

Email Center Supervisor

Prerequisites

Steps

1. Click the **Supervisor** tab.

   The Supervisor console appears.

2. Click the **Agent** subtab.

3. From the side panel, click **Summary**.

   The Agent Summary page appears.

4. In the Agent/Account column, click the expand icon corresponding to the appropriate agent.

   The Agent Summary page refreshes, and the summary view table expands to reveal all inboxes for the selected agent.

5. From the Emails In Inbox column, click the hyperlinked number for the appropriate account inbox.

   The Agent Inbox page appears, displaying a summary view table of all the email messages in the selected agent account inbox.

6. In the select column, select the message you want to assign to another resource group, and click **Requeue**.

The Requeue page appears.

7. If you want to requeue the message back to the same resource group, select the **Same Resource Group** option.

8. If you want to requeue the message to a different resource group of agents, select the **Different Resource Group** option, then from the Select column, select the resource group to which you want to requeue the message.

9. Optionally, from the Requeue Reason list, select a reason for requeueing the message.

10. Click **Apply**.

The Agent Inbox page appears and displays a confirmation message stating that the message requeue was successful.

Deleting Messages From an Agent's Inbox:

Use the steps below to delete messages from an agent's inbox.

Login

HTML Login URL

Responsibility

Email Center Supervisor

Prerequisites

Steps

1. Click the **Supervisor** tab.

   The Supervisor console appears.

2. Click the **Agent** subtab.

3. From the side panel, click **Messages > Summary**.

   The Agent Summary page appears.

4. In the Agent/Account column, click the expand icon corresponding to the appropriate agent.

   The Agent Summary page refreshes, and the summary view table expands to reveal all inboxes for the selected agent.

5. From the Emails In Inbox column, click the hyperlinked number for the appropriate account inbox.

The Agent Inbox page appears, displaying a summary view table of all the email messages in the selected agent account inbox.

6. In the select column, select the message you want to delete, and click **Delete**.

   The Delete Confirmation page appears.

7. From the Reason Code list, select the reason why you are deleting the message.

8. Click **Apply**.

   The Agent Inbox page appears and displays a confirmation message stating that the delete was successful.

Assigning Agents to Email Accounts:

Use this procedure to assign agents to an email accounts from the Supervisor Console.

Login

HTML Login URL

Responsibility

Email Center Supervisor

Prerequisites

The email account must be defined in Email Center.

Steps

1. Click the **Supervisor** tab.

2. Click the **Agent** subtab.

3. In the side panel, click **Accounts > Assignment**.

   The Agents and Accounts Assignments page appears.

4. From the list in the Assign field, select **Agents to Accounts** and click **Go**.

5. From the list in the Email Account field, select the email account to which you want to assign an agent and click **Go**.

   The Assign an Agent to an Email Account page refreshes with the list of available agents displayed in the Available Agents list. The Assigned Agents list displays the list of agents that had previously been assigned to the email account.

   > **Note:** A number is listed in brackets next to agent names displayed in the Assigned Agent list. This number represents the number of email messages that are currently sitting in the agent's Inbox.

6. If you want to assign selective agents to the email account, do one of the following.

   1. From the Available Agents list, click to select the agent that you want to assign to the email account.

   2. From the Available Agents list, select the agent(s) that you want to assign to the email account and then click the Move icon.

      > **Note:** You can select multiple agents by holding down the Shift key or the Ctrl key.

7. If you want to assign all available agents to the email account, click the Move All icon.

   You can also select agents already assigned to the account and click the Remove icon to disassociate one or more agents from the account.

   > **Note:** You can disassociate agents who currently have emails for this account in their inbox. In other words, agents for whom the count in the brackets is greater than zero.

8. If you want to save your work and assign the agent(s) to the email account, click **Apply**.

   A confirmation message appears indicating that the agent(s) has been successfully assigned to the email account.

Assigning Email Accounts to Agents:

Use this procedure to assign email accounts to agents from the Supervisor Console.

Login

HTML Login URL

Responsibility

Email Center Supervisor

Prerequisites

The email account must be defined in Email Center.

Steps

1. Click the **Supervisor** tab.

2. Click the **Agent** subtab.

3. In the side panel, click **Accounts > Assignment**.

The Agents and Accounts Assignments page appears.

4. From the list in the Assign field, select **Accounts to Agents** and click **Go**.

5. Enter the search criteria to search for the agent(s) you want to assign to an email account.

   1. If you want to search for an agent using the agent's user name, in the Agent User Name field, type the name of the agent.

   2. If you want to search for an agent using the first name of the agent, in the First Name field, type the first name of the agent.

   3. If you want to search for an agent using the last name (family name) of the agent, in the Last Name field, type the last name of the agent.

   4. If you want to search for an agent assigned to a specific resource group, from the Resource Group list, select the resource group.

   5. If you want to search for an agent based on their assigned Email Center resource roles, from the Resource Role list, select the resource role.

6. Click **Search**.

   The agent search results appears listing the agents which were found to match the given search criteria.

7. In the Select column, select the box next to the agent user name of the user you want to assign to email accounts.

8. Click **Assign Email Account**.

   The Agents and Accounts Assignments page refreshes with the list of available email accounts displayed in the Available Email Account list. The Assigned Email Account list displays the list of email accounts that had previously been assigned to the agent.

   > **Note:** A number is listed in brackets next to email account names displayed in the Assigned Email Account list. This number represents the number of email messages that have been fetched by that agent from the account.

9. If you want to assign selective email accounts to the agent, do one of the following.

   1. From the Available Agents list, click to select the agent that you want to assign to the email account.

2. From the Available Email Account list, select the account(s) that you want to assign to the agent and then click the Move icon.

> **Note:** You can select multiple accounts by holding down the Shift key or the Ctrl key.

10. If you want to assign all available email accounts to the agent, click the Move All icon.

    You can also select accounts already assigned to the agent and click the Remove icon to disassociate one or more accounts from the agent.

    > **Note:** You can only disassociate accounts for which currently the count in the brackets is zero.

11. If you want to save your work and assign the email account(s) to the agent, click **Apply**.

    A confirmation message appears indicating that the email account(s) has been successfully assigned to the agent.

Managing Documents

The Supervisor tab provides you with a variety of tools to search, browse, import, edit, publish, and create hierarchies for MES documents.

Creating Categories in MES:

Use the steps below to add new MES categories.

Login

HTML Login URL

Responsibility

Email Center Supervisor

Prerequisites

You must have an MES Administrator resource role.

Steps

1. Click the **Supervisor** tab.

2. Click the **Knowledge Base** subtab.

3. From the side panel, click **Document > Categories**.

The Category Manager page appears.

4. If no blank rows are available, click **Add Row(s)** and, when prompted, type the number of new rows you want to add and click **OK**.

5. In the provided fields, type the name of the new category, a description of it, and select it's parent category (if applicable).

6. Click **Update**.

Defining a Hierarchy Among the Categories:

Use the steps below to create a hierarchy of MES categories.

Login

HTML Login URL

Responsibility

Email Center Supervisor

Prerequisites

You must have an MES Administrator resource role.

Steps

1. Click the **Supervisor** tab.

2. Click the **Knowledge Base** subtab.

3. From the side panel, click **Categories**.

   The Category Manager page appears, displaying a list of categories.

4. Browse through the listings until you can view the row displaying the name of the desired child category in the Category Name column.

5. From the list in the Parent Category column, select the desired parent category.

6. Click **Update**.

Creating and Publishing MES Documents:

Use the steps below to create and publish a document for MES by using the template editor.

Login

HTML Login URL

Responsibility

Email Center Supervisor

Prerequisites

You should have the MES Administrator role assigned and MES categories must be created.

Steps

1. Click the **Supervisor** tab.

2. Click the **Knowledge Base** subtab.

3. From the side panel, click **Document** > **Editor**.

   The Create Document page appears.

4. In the Title field, type a name for your document.

5. In the Description field, provide a short description of the document.

6. In the Category field, search for and select the appropriate MES category in which you want to create your document.

7. Click the hypertext link above the Template Body field to switch from plain text mode to rich text mode.

   Rich text mode allows you to format the font of the email, and include an image or hyperlink in the email.

8. In the Template Body field, type the desired document content. Optionally, you can include the following in the document's content:

   • One or more pre-defined SQL queries by using the Query Name field to search for, select, and insert the appropriate query.

   • One or more standard merge fields by selecting a value from the Standard Merge Field list and clicking **Insert**.

   • One or more custom merge fields by entering a value in the Custom Merge Field text field and clicking **Insert**.

9. To preview the document before you publish it, click **Preview**.

10. To spell check the document, click the **Spell Check** hyperlink.

11. Click **Publish**.

    A conformation message appears, stating that you successfully published the document.

Uploading and Publishing MES Documents:

Use the steps below to import and publish a document for MES.

Login

HTML Login URL

Responsibility

Email Center Supervisor

Prerequisites

You should have the MES Administrator role assigned and MES categories must be created.

Steps

1. Click the **Supervisor** tab.

2. Click the **Knowledge Base** subtab.

3. From the side panel, click **Document** > **Publish**.

   The Publish Document page appears.

4. In the Title field, type a title for the document you are going to upload.

5. In the Description field, provide a short description of the document.

6. In the Category field, search for and select the appropriate MES category for your document.

7. Click **Upload File**.

   The Upload File browse box appears.

8. In the Upload File browse box, click **Browse**, search for and select the file you want to upload.

9. Click **Upload**.

   The Publish Document page refreshes and the selected file appears in the Files field.

10. Click **Publish**.

    A confirmation message is displayed, stating that the new document has been published.

    > **Note:** If the documents loaded into MES will be used as suggested responses, a concurrent process needs to be run in order to rebuild

the Oracle Text index for MES. Log in as the Email Center Concurrent Program Administrator user in the forms application, and submit a request to run the Rebuild Help Search Index concurrent process (refer to the Business Data Checkpoint section).

Searching for MES Documents:

Use the steps below to search for a particular MES document.

Login

HTML Login URL

Responsibility

Email Center Supervisor

Prerequisites

You should have the MES Administrator role assigned and the document must already be published to MES.

Steps

1. Click the **Supervisor** tab.

2. Click the **Knowledge Base** subtab.

3. From the side panel, click **Document > Search**.

   The Search Documents page appears.

4. In the Enter Search Criteria field, type the name or partial name of at least two characters.

5. Click **Go**.

   The Document Search Results table refreshed to display the results of the search.

Browsing the MES Document Categories:

Use the steps below to browse the MES categories for a particular document.

Login

HTML Login URL

Responsibility

Email Center Supervisor

Prerequisites

You should have the MES Administrator role assigned and the document must already

be published to MES.

Steps

1. Click the **Supervisor** tab.

2. Click the **Knowledge Base** subtab.

3. From the side panel, click **Document > Browse**.

   The Browse Documents page appears, displaying a summary view table of all the MES categories.

4. In the MES Category column, click the expansion icon to view sub-categories under a particular MES category (if applicable).

   The summary view table expands to show the sub-categories for the selected MES category.

5. In the View column, click the appropriate View icon to view the documents in a particular MES category or sub-category.

Updating MES Documents:

> **Note:** You can only update documents that you published. You cannot update documents that have been published by other users.

Use the steps below to update MES documents.

Login

HTML Login URL

Responsibility

Email Center Supervisor

Prerequisites

You should have the MES Administrator role assigned and the document must already be published to MES.

Steps

1. Click the **Supervisor** tab.

2. Click the **Knowledge Base** subtab.

3. Search or browse for the document you want to update by performing the steps listed in the Browsing the MES Document , page 2-85Categories topics.

4. In the Update column, click the update icon for the document you want to update.

The Publish Document page appears.

5. Update the document title, description, category, or upload a new file as necessary.

6. Click **Update**.

The Publish Document page refreshes to display a confirmation message stating that the document was updated.

> **Note:** If you click **Publish**, a new document will be created. To update the existing document you must click **Update**.

Removing MES Documents:

Use the steps below to remove a MES document you published.

> **Note:** You can only delete documents that you published. You cannot delete documents that have been published by other user names.

Login

HTML Login URL

Responsibility

Email Center Supervisor

Prerequisites

You should have the MES Administrator role assigned.

Steps

1. Click the **Supervisor** tab.

2. Click the **Knowledge Base** subtab.

3. Search or browse for the document you want to update by performing the steps listed in the Browsing the MES Document , page 2-85Categories topics.

4. In the Select column of the table, select the box for the document you want to remove.

5. Click **Remove**.

The page refreshes to display a confirmation message stating that the selected document was deleted.

Managing Queries

Use the Query page to set up and maintain queries.

Creating Queries:

Use this procedure to create a query.

Login

HTML Login URL

Responsibility

Email Center Supervisor

Prerequisites

You must be assigned the JTF_FM_ADMIN role to create queries.

Steps

1. If you are logging in with the Email Center Administrator responsibility, click the **Knowledge Base** subtab. If you are logging in with the Email Center Supervisor responsibility, click the **Supervisor** tab then click the **Knowledge Base** subtab.

2. From the Side panel, click **Query > Create**.

   The Create Query page appears.

3. In the Query Title field, type a unique name for the query that you want to create. You can use a maximum of 50 characters.

4. In the Query Description field, type any free-form text that you want to use to describe the query that you are creating. You can use a maximum of 255 characters.

5. In the Query String field, type the SELECT statement for the query. You can use a maximum of 4000 characters.

   > **Note:** Do not end the query with a semicolon (;) or slash (/).

   For example, if the document had following merge fields:

   Dear ((*FIRST_NAME*)) ((*LAST_NAME*)),

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

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

   SELECT CUSTOMER_FIRST_NAME "((*FIRST_NAME*))",

   CUSTOMER_LAST_NAME "((*LAST_NAME*)) ",

PRODUCT_NAME "((*PRODUCT*)) ",

RELEASE_DATE "((*DATE*)) "

FROM PRODUCTS_RELEASE_TABLE

WHERE PRODUCT_ID =: PID

> **Note:** Ensure that the SQL query is written such that a default value is returned if the query returns no data, otherwise the template/response document cannot be used. The result of the query must be both non-null and unique.

6. Type the alias for each column used, in "SQL Merge Field" and click **Insert**. This way a merge field bearing the alias name will be provided when this SQL query is associated with a document.

> **Note:** The alias used for each column in the SELECT statement must match the merge field name and must be enclosed within the valid merge field delimiters. To assist in this process, Oracle Email Center allows you to insert SQL merge fields. Do not end the query with a semicolon (;) or slash (/).

> **Note:** When typing a SQL merge field, you must use all capital letters. While no white spaces are allowed, you can use numerals and underscores (_).

> **Note:** Since the functionality to insert merge fields cannot recognize the current cursor position in the Query String editor, the merge field always gets inserted at the end of the statement. Therefore, Oracle recommends that you insert the merge fields immediately after typing the corresponding column name.

Bind variables are used within the WHERE clause of the SQL statements to restrict the result set extracted from the database. In the above example "PID" is a bind variable. Bind variables must be entered exactly as shown above, i.e., with column name followed by the "=:" operator and then the bind variable name.

When the user selects a document that includes bind variables, he/she will be prompted to enter values for the bind variables entered in the WHERE clause unless the bind variable is a "standard" merge field itself. In which case the bind variable will be populated automatically. The SQL query will get executed using the value for the bind variable when the associated document is previewed, inserted or attached.

7. Click **Validate SQL**.

   You will be prompted to enter a value for the bind variables used in the query, in any are necessary.

8. Enter a random numeric or varchar value (depending on the data type of the corresponding column) for the bind variable, and click **Validate SQL**.

   > **Note:** Varchar values must be enclosed in single quotes (').

   You receive a confirmation messages stating that the validation was successful and the prompt you created in the Query String field is added.

9. If you want to save your work and create the query, click **Create**.

10. If you do not want to save your work and want to clear all of the input fields, click **Cancel**.

Viewing Queries:

Use this procedure to view an existing query.

Login

HTML Login URL

Responsibility

Email Center Supervisor

Prerequisites

You must be assigned the JTF_FM_ADMIN role to view queries.

Steps

1. If you are logging in with the Email Center Administrator responsibility, click the **Knowledge Base** subtab. If you are logging in with the Email Center Supervisor responsibility, click the **Supervisor** tab then click the **Knowledge Base** subtab.

2. From the side panel, click **Query > List**.

   The Query List page appears.

3. In the Query Title column, click the query name hyperlink of the query you want to view.

   The Query Details page appears.

   The SQL statement details are displayed along with the list of documents associated with this query.

> **Note:** A query cannot be deleted if it has one or more documents associated with it.

4. Click **Back** when you have finished viewing the selected query.

Removing Queries:

Use this procedure to remove an existing query.

> **Note:** You can only remove queries that you created.

Login

HTML Login URL

Responsibility

Email Center Supervisor

Prerequisites

You must be assigned the JTF_FM_ADMIN role to remove queries.

Steps

1. If you are logging in with the Email Center Administrator responsibility, click the **Knowledge Base** subtab. If you are logging in with the Email Center Supervisor responsibility, click the **Supervisor** tab then click the **Knowledge Base** subtab.

2. From the side panel, click **Query > List**.

   The Query List page appears.

3. In the Select column, click the box corresponding to the query you want to remove.

4. Click **Remove**.

Setting Email Center Agent Console Profiles

Two specific types of profiles can be set for the Oracle Email Center Agent console. They are:

- General Profiles, page 2-91

- Account Specific Profiles, page 2-93

Setting General Profiles:

Use the steps below to set general profiles

Login

HTML Login URL

Responsibility

Email Center Supervisor

Email Center Agent Console

Email Center Message Component

Prerequisites

Steps

1. Click the **Profile** icon.

2. On the side panel, click **Email Center > General**.

    The General page appears.

3. From the Default Account list, select the account you want to use as your default account.

    The account selected in the Default Account profile option is used in following scenarios:

    1. When an agent clicks the **Messages** tab, the inbox for the default account selected here is displayed.

    2. When the agent clicks **Messages > Search**, the Account drop-down list displays the default account selected here.

    3. When you click the **Customer** tab in the Agent console, then search for and select a customer to "Create a Message", the "From Account" in the Compose window will be populated with the default account selected here.

4. Select the **Automatically add primary address to message when selecting a customer** option if you want to automatically add the primary address of the customer to the To list.

    If you do not select this option, the customer's email address is not automatically added to the To list. In this case you will have to type or cut-and-paste the address in the To field.

5. In the Number of Editor Rows to Display field, type the number of rows you want displayed.

    This number controls the size of the editor (text entry box) on the Reply/Compose page.

6. Select the Preferred Editor option to control whether you will use rich text or plain text.

7. From the Viewing Time Zone list, select the time zone you want.

   The time zone selected here affects the specific time zone displayed in the "Date" column on your My Inbox page.

8. From the Count Activities Since list, select the time period you want.

   Your options are:

   - Last login

   - Today

   - This Week

9. Click **Update**.

Setting Account Specific Profiles:

Use the steps below to set account specific profiles

Login

HTML Login URL

Responsibility

Email Center Supervisor

Email Center Agent Console

Email Center Message Component

Prerequisites

Steps

1. Click the **Profile** icon.

2. On the side panel, click **Email Center > Account Specific**.

   The Account Specific page appears.

3. From the Account Name list, select the name of the account for which you want to set preferences.

4. The Message Header Information area displays the Name and the accounts set by the administrator when creating the selected email account. The information displayed here is for informational purposes only and cannot be set at the agent

level.

5. Select the Append this signature to outbound messages option if you want the text you type in the Signature field to appear for every message you compose or reply to.

6. In the Signature field, type the text you want to appear for every message you compose or to which you reply.

7. Click **Update**.

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