Oracle® Marketing Encyclopedia System

Implementation Guide

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Overview of Oracle Marketing Encyclopedia System

Oracle Marketing Encyclopedia System (MES) is a content repository management component of the CRM suite of applications that allows you to create, publish, and manage content. It also allows you to organize content in different hierarchies.

Hierarchy of categories and channels are the means to store, organize, and distribute different types of content items in the MES repository.

A hierarchy can have unlimited levels of categories. Channels are the lowest level in the hierarchy of categories that contain published items.

Access to the MES repository is controlled through the Access Manager. A MES administrator can set up access privileges for users. MES also has a concept of groups to which access privileges can be setup. An administrator can define different groups and associate users to these groups.

Depending on your access privileges, you can create categories or channels, publish items, and approve publishing items to a particular channel.

Planning Your Implementation

Before publishing content items and viewing these items in the MES repository, an administrator has to understand and complete the following steps:

- Prerequisites for Accessing the MES Functionality

- Setting up the Privileges

- Creating a Group

- Setting up Privilege For the Whole Group

- [Setting up Access for a Channel](#)
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Prerequisites for Accessing the MES Functionality

MES is embedded as a part of other CRM applications, e.g, in Oracle Marketing or Oracle SalesOnline. MES is not a stand alone application. See the documentation of the particular application that MES is embedded in for more information about accessing MES from that application.

> **Note:** The user logging into MES has to be associated with a resource.

Understanding the Access Manager

At the center of the MES application is the Access Manager. It is used to:

- create and maintain groups (Group Manager)
- assign user and group privileges (Privilege Manager)
- give channel access privileges (Channel Manager) for every user that needs to access MES.

Understanding the Privilege Manager

MES administrator can assign privileges to users or groups of users depending on the operations that the users or groups would be performing.

Setting up the Privileges

Use this procedure to set up privileges for a MES user. When a user logs on, she will be able to perform only those operations specified by the administrator.

Steps

1. Log on to a specific application.

2. Navigate to **MES**->**Administration** ->**Privilege**. Privilege Manager screen appears.

3. Query the user or the group that you want to give access to. Give the user or group the desired privilege(s). The privileges that the administrator can assign are:

   - Administrative privileges

   - Publishing content

   - Approving content

   - Setting up a Channel (Create, Update, Delete, View Channel)

   - Setting up a Category (Create, Update, Delete, View Category)

   - Publishing to a Territory

4. Click **Update**.

Understanding the Group Manager

A group comprises of one or more users. A published document or a message may be distributed to many users. Additionally, groups may contain different types of users, that is, users who have different levels of security or privileges.

Creating a Group

Use this procedure to create a group for a MES user.

Steps

1. Log on to a specific application.

2. Navigate to **MES**->**Administration** ->**Group**. Group Manager screen appears.

3. Add a group by entering a group name in the empty column.

4. Click **Update**.

5. Click **View Member List**. Edit Group Members for <group name> screen appears.

6. You can either query the users that are a part of this group or add new group members.

7. Click **Update**.

Setting up Privilege For the Whole Group

MES administrator can setup common privileges for all the users in a particular group.

Steps

1. Log on to a specific application.

2. Navigate to **MES**->**Administration** ->**Group**.

3. Query the group that you want to assign the privilege to.

4. Give the group the desired privilege. The privileges that an administrator can assign are:

   - Administrative

   - Publishing Content

   - Approving Content

   - Setting up a Channel (Create, Update, Delete, Channel)

   - Setting up a Category (Create, Update, Delete, Category)

   - Publishing to a Territory

5. Click **Update**.

> **Note:** When a group is created through the MES user interface, a group channel is implicitly created for it with the same group name. Users can publish to a group, by publishing to a group channel. Since multiple users can be associated to a group, this is a means of distributing documents to more than one user. If a group is created externally, for example, through a Resource Manager, no group channel is automatically created.

Understanding the Channel Manager

The MES administrator may create channels and control the access over these channels. Channels have View, Update, and Delete privileges. An

administrator can assign these privileges to either a channel, a user, or a group.

Setting up Access for a Channel

Use this procedure to set up access for a channel.

Steps

1. Log on to a specific application.

2. Navigate to **MES**->**Administration** ->**Channel Access. Channel Access Manager** screen appears.

3. If you know the channel name, enter it and click **Setup Access for This Channel** button or leave it blank and click **Setup Access for This Channel** button. A list of all the channels in the system appears.

4. Select a channel name from the list and click **Setup Access for Channel** button.

5. Query the user or the group to whom you want to give privilege for this channel.

6. Give the group or user the desired privilege. The privileges that an administrator can assign are:

   - Delete: delete this channel

   - Update: update contents of this channel

   - View: view the channel

   - Approve content: approve content for this channel

7. Click **Update**.

Setting up Channel Access for the User

Use this procedure to set up channel access for the user.

Steps

1. Log on to a specific application.

2. Navigate to **MES**->**Administration** ->**Channel Access.**

3. If you know the user name, enter it, and click **Setup Access for this User** button or leave it blank and click **Setup Access for this User** button. A list of users appears.

4. Select a user name from the list and click **Setup Access for the User** button.

5. Query the channel that you want to give privilege for this user. Give the channel the desired privilege. The privileges that the administrator can assign are:

   - Delete: delete this channel

   - Update: update contents of this channel

   - View: view the Channel

   - Approve Content: approve content for this channel

6. Click **Update**.

Setting up Channel Access for a Group

Use this procedure to set up channel access for a group.

Steps

1. Log on to a specific application.

2. Navigate to **MES**->**Administration** ->**Channel Access.**

3. If you know the group name, enter it and click **Setup Access for this Group** button or leave it blank and click **Setup Access for this Group** button. A list of group names appears.

4. Select the group name from the list and click **Setup Access for Group** button.

5. Query the channel to which you want to give privilege for this group.

6. Give the channel the desired privilege. The privileges that the administrator can assign are:

   - Delete: delete this channel

   - Update: update contents of this channel

   - View: view the Channel

   - Approve Content: approve content for this channel

7. Click **Update**.

Creating Categories and Setting up Category Hierarchy

A MES administrator has to create categories and setup category hierarchies based on how it will be used by MES users. Administrator will have permissions to setup categories and category hierarchies.

Creating Categories

Use this procedure to create categories.

Steps

1. Log on to a specific application.

2. Navigate to **MES**->**Administration** ->**Category Manager**.

3. Add or update the category information.

4. Click **Update.**

Setting Up a Category Hierarchy

Use this procedure to set up a category hierarchy.

Steps

1. Log on to a specific application.

2. Navigate to **MES**->**Administration** ->**Category Manager/ Hierarchy Manager**. This screen allows an administrator to define the parent categories of each category. If the parent category is set up to None, then this category becomes the root of a hierarchy.

3. Click **Update**.

Creating Content Types

Content type is an attribute assigned to all content. Content types allow you to refine the definition of content, thereby creating attributes which channels can receive. There are some seeded content types which will be provided.

An administrator will have permissions to create new content types or modify/delete the existing content types.

Steps

1. Log on to a specific application.

2. Navigate to **MES**->**Administration** ->**Content Type**.

3. Add or update the content type information.

4. Click **Update**.

Creating Perspectives

Perspectives are attributes which can be assigned to all content. Perspectives allow you to refine the definition of content and create attributes that the channels can receive.

Administrators will have permissions to create and maintain perspectives.

Steps

1. Log on to a specific application.

2. Navigate to **MES**->**Administration** ->**Content Perspective**.

3. Add or update the perspectives information.

4. Click **Update**.

Creating Channels

Channels are used by MES to distribute content items to users and to classify content in MES repository.

Administrator will have permissions to create new channels.

An administrator can also optionally define if permission is needed for subscribing to or publishing content to the channel being created and the group of users who are to be the approvers for those privileges.

Steps

1. Log on to a specific application.

2. Navigate to **MES**->**Administration** ->**Create Channel**. Each channel has a parent, which is either a category or a subcategory.

3. Enter information in the required fields.

> **Note:** While defining a channel, you can optionally define content types, perspectives, item types, authors, and key words. These attributes are used by the matching engine to identify if any published item can implicitly be pushed into this channel by mapping these attribute values with the item attribute values. You can also indicate if an approval process is needed for publishing and subscribing to this channel. If approval is needed, and the user wants to change the default approvers, then she can select the primary and secondary approvers.

4. Click **Create**.

Setting up Territories

Users can belong to different territories. Whenever any content item is published, the publisher can optionally specify to which territories the item should be published. For setting up territories, see the section on Implementing Territory Management in the latest *Oracle CRM Foundation Implementation Guide.*

Setting up Workflow Time Out

MES administrators have to set up the Time out Workflow definitions, which direct the workflow engine the time that an item that needs approval has to wait in an approver's inbox. If the approver does not respond with in that configured time, then the workflow engine performs the next action defined in the workflow process.

Changing the Default Values for Workflow Time Out

Use the workflow builder to change the time out value for any node in the work flow time out process.

Steps

1. Start the workflow builder.

2. Connect to the application database.

3. In Show Item Types screen, move MES Approvals from the Hidden section to the visible section.

4. Click OK.

5. Under MES Approvals-->Processes, you can see the following four processes:

   - Content Approval Process

   - Subscription Approval Process

   - Notify Approver- Publishing

   - Notify Approver- Subscription

     Note: Content Approval Process uses Notify Approver - Publishing and Subscription Approval Process uses Notify Approver - Subscription.

6. To change the default time out values, select the corresponding process. For example, if you want to change time out duration in Content

Approval Process, double click Notify Approver - Publishing. To change time out values in Subscription Approval Process, double click Notify Approver - Subscription. Depending on the selection made, either Notify Approver - Publishing or Notify Approver - Subscription screen appears.

7. Select and double click the Notification which has a prefix, Publishing Approval Notification... in its display name. Navigator Control properties screen appears.

8. Select the Node tab. The Node tab has a Time out section that you can modify.

9. Modify the Time out section.

10. Click OK.

Setting up Proxy Information

Intermedia Index

If your application users will publish items of URL type, then you have to make sure that the intermedia indexes are properly generated. Proxy information is needed by Intermedia index for URL type item while regenerating the index to extract meta data information of the URL in the item.

If the proxy information is not correctly setup, then MES will not be able to search the repository for URL type items because index regeneration would have failed on these items.

To setup proxy information, run $JTF_TOP/patch/115/sql/jtfiimt.sql using the following command.

```
sqlplus <apps-user>/<apps-password> @$JTF_TOP/patch/115/sql/jtfiimt.sql
<jtf-user> <jtf-password> <proxy_server_name:port>
<no_proxy_domain_name[,no_proxy_domain_name]>
```

For example:

```
sqlplus apps/apps @$JTF_TOP/patch/115/sql/jtfiimt.sql jtf jtf
"www-proxy.us.oracle.com:80" "us.oracle.com"
```

It will set up the intermedia media preference object. Once the above script is run successfully, run the following command to create the intermedia index.

```
sqlplus <apps-user>/<apps-password> @$JTF_TOP/patch/115/sql/jtfiaibu.sql
<jtf-user> <jtf-password>
```

For example:

```
sqlplus apps/apps @$JTF_TOP/patch/115/sql/jtfiaibut.sql jtf jtf
```

Proxy Setup for Onesource Integration

If your application uses One Source integration, follow the proxy related information as specified in Using the News Daemon.

Setting up Concurrent Jobs

A MES administrator has to setup the concurrent jobs and the frequency at which they should run.

MES provides context search on items stored in the MES repository. For the search functionality to work, there are some concurrent jobs that have to be configured in MES to perform InterMedia index generation for all the published items that are new. MES uses Oracle interMedia search functionality to do content level search. If this concurrent job is not run, then all the published items that are new cannot be searched through the Search user interface.

MES Intermedia Sync and Optimization Operation configures intermedia search on channel name and channel description.

JTF Intermedia Sync and Optimization Operation configures intermedia search on item name, description, URL string, and text message.

There are two types of concurrent programs bundled with MES. To configure InterMedia search, the following concurrent programs have to be run:

- **MES InterMedia Index Sync Operation/JTF InterMedia Sync Operation**

The more frequently you run the Sync Concurrent Program, the faster your newly - reindexed text will be available for your searches. However, the more frequently the indexes are synchronized, slower the query performance due to fragmented indexes.

> **Note:** You should run the concurrent program based on how quickly you want the new or updated information made available to your searchers. This depends on how often your customer publishes an item. If the load is low, you can run the concurrent program as quickly as possible. If the load is heavy, run the concurrent program every two to three hours.

- **MES InterMedia Index Optimizing Operation/JTF Item Intermedia Optimizing Operation**

This concurrent program defragments the intermedia indexes (that were fragmented by the sync operation). Running this concurrent program will take a couple of hours and it should be run once every week, when there is less traffic in the system.

For MES InterMedia Index Optimizing Operation and JTF Item InterMedia Optimizing Operation, there are additional parameters that need to be run:

1. p_optimize_level: There are two types of optimization levels: fast optimization and full optimization.

    - Fast Optimization: deals only with fragmented rows. Fast optimization cannot be limited by time and it often takes a long time to complete, if it is being run for the first time on a badly fragmented index.

    - Full Optimization: glues rows back together in the same manner as fast optimization, but it also removes unrequired information related to deleted rows. It takes longer to run than fast optimization.

2. p_runtime: While running the optimization at full level, you can specify the time duration. This implies that it can be limited to quite times of the day (or week) for your application and the table can be optimized in stages. Many customers therefore prefer to always use full optimization.

- MES Matching Engine

This concurrent program matches newly published content items with the existing channels to which the items are not explicitly published. If newly published items match any of these channels, this concurrent program publishes them to these channels. Also, in a newly created channel, it verifies if any existing published items in the repository can be included. If the items can be included, then it will publish those items in that channel. If an item gets published to a channel implicitly and if that channel needs approvals to publish items, then approval process gets started automatically.

Concurrent Programs as a Part of a Standard Request

Use this procedure to include a concurrent program as a part of a standard request.

Steps

1. Log on to Self Service Application as
   Username: SYSADMIN
   Password: SYSADMIN
   Select the System Administrator responsibility.

2. Click **Security** ->**Responsibility**->**Define**. Responsibilities window appears.

3. Search the Responsibility Name of System Administration. Check the Request Group section. Write down the Request Group Name and Application. For example, System Administrator Reports, Application Object Library.

4. Close this window.

5. Click **Responsibility**->**Request**. Request Groups window appears.

6. Search for the Request Group that you wrote in Step 3 e.g, System Administrator Reports Group.

7. Add all the Concurrent Programs mentioned in this guide in the Requests table. For example, MES InterMedia Index Optimizing operation, MES Matching Engine, MES InterMedia Index Sync Operation, JTF Item InterMedia, Index Sync Operation, and JTF Item InterMedia Index Optimizing operation.

> **Note:** When you go to Submit a Request, you will see the concurrent programs that you added in the list.

Scheduling Concurrent Programs

Use this procedure to schedule concurrent requests.

Steps

1. Log on to Self Service Application.

2. Switch the responsibility to System Administrator.

3. Click **Concurrent** -->**Requests.**

4. Click **View.** Find Requests window appears. Click **Submit a New Request** button.

5. Select the name of the concurrent program that you want to submit.

6. If a schedule is already setup, select the appropriate schedule or create your own schedule based on the information described above.

7. To create a schedule, click the **Schedule** button.

8. Enter information in the mandatory fields.

9. Click **Save** to save the schedule.

10. Click **Submit** to submit the concurrent request.

Guidelines

There is also an index on FND_LOBS table. A script has to be run to alter the index on this table whenever a File is stored. This index should be rebuilt periodically depending on the volatility of the data and after large uploads, otherwise it can get out of date.

Run the following script under $FND_TOP/sql/aflobbld.sql

```
sqlplus <APPSUSER>/<APPS_USER>@$FND_TOP/SQL/aflobbld.sql
```

For Example:

```
sqlplus apps/apps@$FND_TOP/sql/aflobbld.sql
```

Integrating with OneSource

OneSource provides extensive news information that appears on your home page. For integrating with OneSource, you must have licenses for the following applications:

- Oracle Marketing Encyclopedia System

- OneSource. (For license information, contact a OneSource representative).

Loading Stock Symbols

A list of companies traded in NYSE and NASDAQ as of November 10th, 1999 are provided in the seed data. As new companies are listed in these exchanges for trading, the list of companies must be bought from vendors such as Reuters or Quotes.com and loaded to the table. Use the SQL*Loader control file to load this data in the appropriate table.

> **Note:** As the input file content may slightly change between different vendors, you should change the control file provided to suit the vendor's data.

Requirements While Loading Stock Symbols (AMV_STOCKS)

1. Stock_symbol and stock_ric should not have any trailing white spaces. Use rtrim and ltrim, if required.

2. Stock_symbol should be loaded in upper case.

3. Mandatory columns while loading stocks are:

   - stock_id
   - stock_symbol
   - stock_ric
   - stock_desc
   - exchange

Understanding One Source Daemons

To obtain news items from OneSource, there are two kinds of OneSource Daemons:

- **Key Daemon**: updates key identifiers for all stock tickers in the AMV_VENDOR_KEYS table.

- **News Daemon**: updates news for keys selected by users in the AMV_USER_TICKERS table.

Understanding the Key Daemon

1. Obtain key ids from OneSource using a program called KeyDaemon. A key id is a unique identifier for a company. The KeyDaemon program can be run on any machine that has jdk 1.1.6 or later JVM and network access to the database.

2. The KeyDaemon should not be run until the AMV_STOCKS table has been populated.

3. After being shipped, the KeyDaemon should be set up to run only once. This allows new One Source key ids to be found for companies in the AMV_STOCKS table, which were not present at the time of shipping.

> **Note:**   If new ticker symbols are added to the AMV_VENDOR_KEYS table, the key daemon should be run again to obtain key ids from OneSource for these updated stock tickers.

Running the Key Daemon

Guidelines

Run the KeyDaemon. Allow between three to ten hours, depending on the number of stocks for which you would like it to retrieve content provider keyids.

Using the Key Daemon

The following table show a list of the arguments and their meanings for the

KeyDaemon.

Requirements

- Java executable in your applications environment.

- apps.zip in the CLASSPATH. The apps.zip is included in the classpath after you setup the application environment.

Purpose	Syntax	Example	Required	Default
Specify the database host, port, alias, and login information	-d <db connect string> <user or schema> <password>	-d jdbc:oracle:thin:@ap012sun:1521:reldev1 apps apps	yes	N/A
Specify the content provider code	-v <vendor code 1> [, vendor code 2,...] -v ONE_SOURCE,HOOVERS	-v ONE_SOURCE (*currently only this vendor code is available)	Yes	N/A
Specify a file to log errors to	-f <logfile path>	-f <home_ directory>/keyd.log	No	None
Specify a network proxy host and port	-p <proxy hostname> <proxy port>	-p www-proxy.us. oracle.com 80	No. This will be necessary for any company behind a firewall	None
View the usage text	-h			

Purpose	Syntax	Example	Required	Default
Write messages to standard output	-verbose			
Write debugging information to standard output	-debug			

Sample Usage

```
java oracle.apps.amv.news.KeyDaemon -d
jdbc:oracle:thin:@ap012sun:1521:reldev1 apps apps -v ONE_SOURCE -f
keyd.log -p www-proxy.us.oracle.com 80 -verbose
```

Understanding the News Daemon

1. Obtain news items from OneSource, using a program called NewsDaemon.

2. KeyDaemon must be run at least once before NewsDaemon can be run. NewsDaemon can be run at any time and on any machine that has jdk1.1.6 or later JVM and network access to the database.

> **Note:** Never run two separate NewsDaemon processes on the same database at the same time. This will cause errors. The most common error is of duplicate news items.

Running the News Daemon

-   Run the NewsDaemon. It will only fetch news for companies that are specified in a specific user's profile. This kind of update can be performed at least once every hour.

> **Note:** If a user adds a company to his profile, the news for that company will only appear immediately if:
>
> The company symbol exists in AMV_STOCKS.
>
> The KeyDaemon has already retrieved the content provider key for that company.
>
> Another user had that company in his profile before the News Daemon has been run at least once.

Using the News Daemon

The following table shows a list of arguments and their meanings for running the News Daemon.

Requirements

- Java executable in your applications environment.

- apps.zip in the CLASSPATH. The apps.zip is included in the classpath after you setup the application environment.

Purpose	Syntax	Example	Required	Default
Specify the database host, port, alias, and login information	-d <db connect string> <user or schema> <password>	-d jdbc:oracle:thin:@ap012sun:1521:reldev1 apps apps	Yes	N/A
Specify the content provider code	-v <vendor code 1>[, vendor code 2,...]	-v ONE_SOURCE, HOOVERS -v ONE_SOURCE (*currently only this vendor code is available)	Yes	N/A
Specify the sleep interval between User Updates in hours, minutes, seconds, and milliseconds	-su <HH:MM>	-su 1:00 (once every hour)	No	1:00 (once every hour)
Specify the number of news items to be fetched for each company during a User Update	-sn <number of news items>	-sn 10	No	10 (This is also the maximum number of news items allowed for a User Update)

Purpose	Syntax	Example	Required	Default
Specify a file to log errors to	-f <logfile path>	-f <home_ directory>/newsd. log	No	None
Specify a network proxy host and port	-p <proxy hostname> <proxy port>	-p www-proxy.us.ora cle.com 80	No. This will be necessary for any organiza- tion behind a firewall.	None
Write messages to standard output	-verbose			
View the usage text	-h			
Write debugging information to standard output	-debug			

Sample Usage

```
java oracle.apps.amv.news.NewsDaemon -d
jdbc:oracle:thin:@ap012sun:1521:reldev1 apps apps -v ONE_SOURCE -su 4:00
-sn 5 -f keyd.log -p www-proxy.us.oracle.com 80 -verbose
```