Oracle® Marketing Encyclopedia System

Concepts and Procedures

Understanding Oracle Marketing Encyclopedia System

This topic group provides overviews of the application and its components, explanations of key concepts, features, and functions, as well as the relationship of the application to other Oracle or third-party applications.

Overview of Oracle Marketing Encyclopedia System

Oracle Marketing Encyclopedia System (MES) is a content repository management component of the Customer Relationship Management (CRM) suite of applications that allows you to create, publish, and manage content. It also allows you to organize content in different hierarchies. The content can include any business critical, pertinent information such as product pricing, competitive data, industry news, and sales presentations. This content can be in a variety of formats, including HTML, digital video, Power Point, etc.

By using MES, sales and marketing professionals can swiftly and precisely deliver the right information to the right people, at the right time. It provides employees, business partners, and customers with pertinent, business-critical information, such as product pricing, competitive data, industry news, and sales presentations.

MES also has search capabilities for finding specific information. You can search for information by using metadata, such as title, author, keyword, and/or date of publication. Search results include the percentage of match to entered search criteria and links to content.

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.

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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.

MES is embedded as a part of other CRM applications, e.g, in Oracle Marketing Online or Oracle Sales Online. 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.

How MES Integrates with Other Oracle Applications

Oracle Marketing Encyclopedia System (MES) provides infrastructure to other CRM applications to manage their content. These applications include, Oracle Marketing Online, Oracle Sales Online, Oracle Support, Email Center, Knowledge Management, Partner Relationship Management, and Defect Management System. MES allows applications to store, retrieve, and categorize the content according to their application needs. It also provides ability to send messages to a set of users by creating a group and publishing items to that group.

Current MES functionality is developed using JMES (common MES, that is part of Oracle CRM Foundation(JTF)), Advanced Queues, Oracle Workflow, and Oracle Intermedia. JMES is the JTF component that provides the functionality to upload and download the documents to/from the database.

Oracle Marketing Encyclopedia System is integrated with Oracle Sales Online and Oracle Marketing Online. MES provides a comprehensive solution that streamlines information management by enabling sales and marketing professionals to browse, search the content of their system, and communicate and distribute information both inside and outside an organization. Oracle MES uses push communications and channel subscriptions to simplify the gathering and delivery of information to the extended sales chain. Oracle Marketing Online users can use MES to publish and access marketing and other material.

Overview of Oracle Marketing Encyclopedia System Functionality

MES provides the following features:

Content Repository

MES provides a central repository for storing and retrieving information in a variety of formats. MES provides views of all the categories and channels of information maintained by an organization.

Role and Permission Based Access

MES includes access control features for managing the publishing process more efficiently. Security is based on group privileges and on user roles. The users can assign, update, and change access privileges depending on their roles and responsibilities. The users can also publish items based on their privilege setup and send messages to any group created in MES.

Notification, Approval and Message Capabilities

MES user interface contains bins for holding messages, notifications, and items pending approval. Message bins hold broadcast messages and are useful for sharing urgent information. The Notification bin allows channel creators to receive notices when new content items are published to their channels. The Approval bin holds content that requires approval for publication to a given channel.

Keyword and Content Based Searching

MES offers search capabilities for finding specific information. Users can search for information by using metadata such as title, author, keyword, and/or the date of publication. Search results include the percentage of the result matched to the search criteria and links to content.

Other Features

- Automatically publishing the items to channels that match the publishing criteria, using the Matching Engine.

- APIs support in both Java and PL/SQL.

- My Channels screen to view channels and categories that a user subscribes to. The users can also view their published items, notifications, messages, and items published to group channels and territories.

Using Oracle Marketing Encyclopedia System

This topic group provides process-oriented, task-based procedures for using the application to perform essential business tasks.

This chapter covers overall Navigator and screen functionality and explains how to use the fields and other elements within screens.

Overview

MES is embedded as a part of other CRM applications, e.g., in Oracle Marketing Online or Oracle Sales Online. 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.

You will either see a MES tab or an Encyclopedia tab in a particular application's user interface. After you log in and click the MES/Encyclopedia tab, the following sub tabs appear:

- Categories
- My Channels
- Publish
- Administration

Categories

Categories in Oracle Marketing Encyclopedia System are a means to store, organize, and distribute different types of content items in the MES repository e.g., Company News, Marketing, Sales etc. You can view the different categories that are available from this screen.

Prerequisites

Access to an application that has MES embedded in it.

Steps

1. Log on to an application that has MES embedded in it.
2. Click Encyclopedia/MES tab.
3. Click Categories sub tab. Categories screen displaying the available categories appears.
4. Click on a category or a sub category to navigate to the <category name> screen displaying more information about it.

Subscribing to a Category

You can view details about a selected category including the subcategories and the items that are published under it. You can also subscribe to a category from the categories screen.

Prerequisites

Access to an application that has MES embedded in it.

Steps

1. Log on to an application that has MES embedded in it.

2. Click Encyclopedia/MES tab.

3. Click Categories sub tab. Categories screen displaying the available categories appears.

4. Click on a category or a sub category to navigate to the <category name> screen to view more information about it.

5. Click + (Plus) button to subscribe to a category or a sub category. The Plus sign changes to a check sign, indicating that you have subscribed to that category/sub category.

Managing Subscription for a Category/Sub-Category

Prerequisites

Access to an application that has MES embedded in it.

Steps

1. Log on to an application that has MES embedded in it.

2. Click Encyclopaedia/MES tab.

3. Click Categories sub tab. Categories screen displaying the available categories appears.

4. Click on a category or a sub category to navigate to the <category name> screen displaying more information about it.

5. Click the button with a pen on it (Edit this Channel). Edit My Channels screen appears.

6. Select or deselect a category or sub category by checking or unchecking the Select button.

7. Click Update.

My Channels

Channels are the lowest level in the hierarchy of categories that contain published items. My Channels screen displays all the categories and channels to which you have subscribed.

Prerequisites

Access to an application that has MES embedded in it.

Steps

1. Log on to an application that has MES embedded in it.

2. Click Encyclopaedia/MES tab.

3. Click My Channels sub tab. My Channels screen appears. You can view all the categories and the channels that you have subscribed to from this screen.

Publish

You can publish an item type of a file, URL, or a message to various categories or groups.

Prerequisites

Access to an application that has MES embedded in it.

Steps

1. Log on to an application that has MES embedded in it.

2. Click **Encyclopaedia/MES** tab.

3. Click **Publish** sub tab. Publish screen appears.

4. Select an item type: File, Message, or a URL.

5. Enter a Title.

6. Enter an Author.

7. Enter a Description.

8. Select a Content Type depending on the content that is to be published.

9. Enter the Content Creation Date.

10. Enter the Effective Start Date. The content won't be visible through the category hierarchy before the Effective Start Date.

11. Select the Permanent field.

12. Select a Priority.

13. Enter a Category. To search for a category, click Find. Categories screen appears. Select a category. An item can be published to only one category, but multiple channels.

14. In the Files section, you can upload a new file or remove existing files.

15. Click **Publish** or continue with the other selections.

16. In the Territories section, you can perform a search on Territories and add one to the list or remove an existing territorie(s).

17. In the Perspectives section, you can move a value from the Available table to the Selected table.

18. In the Channels section, you can move a value from the Available table to the Selected table. The item gets published to the selected channels. If publishing to any of those channels requires approval, then the appropriate work flow is started.

19. In the Groups section, you can move a value from the Available table to the Selected table. The item is published to the selected group(s) and is visible to you on My Channels screen.

20. Enter Keywords.

21. Click **Publish**.

Administration

You can perform all the administrative tasks associated with Oracle Marketing Encyclopaedia System from this tab. For details about the administrative tasks, see the latest version of *Oracle Marketing Encyclopedia System Implementation Guide.*

Prerequisites

- Access to an application that has MES embedded in it.
- Administrative privileges

Steps

1. Log on to an application that has MES embedded in it.

2. Click Encyclopaedia/MES tab.

3. Click Administration sub tab. Administration screen appears. This screen contains the following links:

- Content Type: to create and manage content types for published items.

- Category Manager: to create and manage new categories.

- Hierarchy Manager: to establish hierarchical relationship among categories.

- Content Perspective: to create and manage perspectives for published items.

- Create Channel: to create and assign properties to new channels.

- Channel Manager: to edit and remove existing channels.

- Group: to create and manage groups.

- Channel Access: to assign channel access privileges.

- User Privilege: to assign user and group privileges.

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