Oracle® Interaction Blending

Implementation Guide

Release 11*i*

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Oracle Interaction Blending Implementation Guide, Release 11*i*

Part No. B10182-02

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Contents

Send Us Your Comments vii

Preface ix

Intended Audience ix
How To Use This Guide ix
Documentation Accessibility x
Other Information Sources xi
Do Not Use Database Tools to Modify Oracle Applications Data xv
About Oracle xvi

1 Introduction

1.1 Oracle Interaction Center Overview 1-1
1.1.1 Oracle Advanced Inbound Telephony 1-2
1.1.2 Oracle Advanced Outbound Telephony 1-3
1.1.3 Oracle Customer Interaction History 1-4
1.1.4 Oracle Email Center 1-4
1.1.5 Oracle Interaction Blending 1-5
1.1.6 Oracle Interaction Center Intelligence 1-6
1.1.7 Oracle One-to-One Fulfillment 1-7
1.1.8 Oracle Scripting 1-8
1.1.9 Oracle Universal Work Queue 1-9
1.2 New in this Release 1-10
1.2.1 Service Plan Templates 1-10
1.2.2 Regional Service Plans 1-10
1.3 Modified in this Release 1-10
1.3.1 Service Levels 1-11
1.3.2 Service Plans 1-11
1.3.3 Oracle Interaction Blending Administration Console 1-11
1.4 Obsolete in this Release 1-11

1.4.1 Interaction Blending Administrator Responsibility 1-11
1.4.2 Blending Service Tab 1-11
1.4.3 Service Categories 1-12

2 Detailed Product Description

2.1 Oracle Interaction Blending Overview 2-1
2.2 Concepts 2-1
2.2.1 Service Plan 2-1
2.2.2 Service Level 2-2

3 Before You Begin

3.1 Mandatory Dependencies 3-1
3.2 Related Documentation 3-2
3.3 Installing Oracle Interaction Blending 3-2
3.4 Accessing Oracle Interaction Blending 3-3
3.4.1 User Accounts 3-4
3.4.2 Responsibilities 3-4

4 Implementation Tasks

4.1 Implementation Task Sequence 4-1
4.2 Defining an Administrator 4-3

5 Administration Tasks

5.1 Interaction Blending Service Levels 5-1
5.1.1 Creating an Inbound Service Level 5-2
5.1.2 Creating an Outbound Service Level 5-3
5.1.3 Updating a Service Level 5-4
5.1.4 Removing a Service Level 5-5
5.2 Interaction Blending Service Plans 5-6
5.2.1 Creating an Inbound Service Plan 5-7
5.2.2 Creating an Outbound Service Plan 5-9
5.2.3 Updating Service Level Assignments 5-11
5.2.4 Updating a Contact Channel Assignments 5-12
5.2.5 Adding a Plan Exception 5-13

5.2.6 Updating a Plan Exception 5-15
5.2.7 Removing a Service Plan 5-16
5.2.8 Adding a Regional Plan 5-17
5.2.9 Updating a Regional Plan 5-19
5.2.10 Removing a Regional Plan 5-20
A.1 Setting System Profile Options A-1
A.2 Blending Profile Options A-3
A.2.1 IEU: Blending Style A-3
A.2.2 IEU: Blending: Timeout A-5
A.2.3 IEU: Queue Order: Blended A-6
B.1 Interaction Blending Server Parameters B-1
B.1.1 Agent Migration Dampening Factor B-1
B.1.2 Agent Status Check Interval (Sec.) B-2
B.1.3 Campaign Status Check Interval (Sec.) B-2
B.1.4 DB Connection Status Check Interval (Sec.) B-2
B.1.5 Service Category Calculation Interval (Sec.) B-2
B.2 Interaction Blending Advanced Server Settings B-3
B.2.1 Java Options B-3
B.2.2 Server Arguments B-3

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Oracle Interaction Blending Implementation Guide, Release 11*i*

Part No. B10182-02

Oracle Corporation welcomes your comments and suggestions on the quality and usefulness of this document. Your input is an important part of the information used for revision.

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If you find any errors or have any other suggestions for improvement, please indicate the document title and part number, and the chapter, section, and page number (if available). You can send comments to us at:

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Oracle Interaction Blending Documentation
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Reston, VA 20190
U.S.A.

If you would like a reply, please give your name, address, telephone number, and (optionally) electronic mail address.

If you have problems with the software, please contact your local Oracle Support Services.

Preface

Intended Audience

Welcome to Release 11*i* of the Oracle Interaction Blending Implementation Guide.

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

- The principles and customary practices of your business area.
- Oracle Interaction Blending

  If you have never used Oracle Interaction Blending, Oracle suggests you attend one or more of the Oracle Interaction Blending training classes available through Oracle University.
- The Oracle Applications graphical user interface.

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

See Other Information Sources for more information about Oracle Applications product information.

How To Use This Guide

This document contains the information you need to understand and use Oracle Interaction Blending.

Chapter 1 describes the Interaction Center product family. It also describes what is new in the current release.

Chapter 2 provides a detailed description of Oracle Interaction Blending.

Chapter 3 describes the system requirements and product dependencies for Oracle Interaction Blending. It also describes how to access the administrative console for Oracle Interaction Blending.

Chapter 4 provides a high-level overview of the implementation task sequence and references to procedures that are performed during the course of an implementation.

Chapter 5 describes task-based procedures for administering Oracle Interaction Blending.

Chapter 6 describes task-based procedures for integrating Oracle Interaction Blending with other products.

Appendix A describes the profile options used in Oracle Interaction Blending.

Appendix B describes the server parameters for the Interaction Blending server.

Documentation Accessibility

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Other Information Sources

You can choose from many sources of information, including online documentation, training, and support services, to increase your knowledge and understanding of Oracle Interaction Blending.

If this guide refers you to other Oracle Applications documentation, use only the Release 11*i* versions of those guides.

Online Documentation

All Oracle Applications documentation is available online (HTML or PDF). Online help patches are available on MetaLink.

Related Documentation

Oracle Interaction Blending shares business and setup information with other Oracle Applications products. Therefore, you may want to refer to other product documentation when you set up and use Oracle Interaction Blending.

You can read the documents online by choosing Library from the expandable menu on your HTML help window, by reading from the Oracle Applications Document Library CD included in your media pack, or by using a Web browser with a URL that your system administrator provides.

If you require printed guides, you can purchase them from the Oracle Store at http://oraclestore.oracle.com.

Documents Related to All Products

Oracle Applications User’s Guide

This guide explains how to enter data, query, run reports, and navigate using the graphical user interface (GUI) available with this release. This guide also includes information on setting user profiles, as well as running and reviewing reports and concurrent processes.

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

Installation and System Administration

Oracle Applications Concepts

This guide provides an introduction to the concepts, features, technology stack, architecture, and terminology for Oracle Applications Release 11*i*. It provides a useful first book to read before an installation of Oracle Applications. This guide also introduces the concepts behind Applications-wide features such as Oracle Business Intelligence System (BIS), languages and character sets, and Self-Service Web Applications.

Installing Oracle Applications

This guide provides instructions for managing the installation of Oracle Applications products. In Release 11*i*, much of the installation process is handled using Oracle Rapid Install, which minimizes the time to install Oracle Applications and the technology stack by automating many of the required steps. This guide contains instructions for using Oracle Rapid Install and lists the tasks you need to perform to finish your installation. You should use this guide in conjunction with individual product user's guides and implementation guides.

Upgrading Oracle Applications

Refer to this guide if you are upgrading your Oracle Applications Release 10.7 or Release 11.0 products to Release 11*i*. This guide describes the upgrade process and lists database and product-specific upgrade tasks. You must be either at Release 10.7 (NCA, SmartClient, or character mode) or Release 11.0, to upgrade to Release 11*i*. You cannot upgrade to Release 11*i* directly from releases prior to 10.7.

Maintaining Oracle Applications

Use this guide to help you run the various AD utilities, such as AutoUpgrade, AutoPatch, AD Administration, AD Controller, AD Relink, License Manager, and others. It contains how-to steps, screenshots, and other information that you need to run the AD utilities. This guide also provides information on maintaining the Oracle applications file system and database.

Oracle Applications System Administrator's Guide

This guide provides planning and reference information for the Oracle Applications System Administrator. It contains information on how to define security, customize menus and online help, and manage concurrent processing.

Oracle Alert User's Guide

This guide explains how to define periodic and event alerts to monitor the status of your Oracle Applications data.

Oracle Applications Developer's Guide

This guide contains the coding standards followed by the Oracle Applications development staff. It describes the Oracle Application Object Library components needed to implement the Oracle Applications user interface described in the *Oracle Applications User Interface Standards for Forms-Based Products*. It also provides information to help you build your custom Oracle9*i* Forms Developer forms so that they integrate with Oracle Applications.

Oracle Applications User Interface Standards for Forms-Based Products

This guide contains the user interface (UI) standards followed by the Oracle Applications development staff. It describes the UI for the Oracle Applications products and how to apply this UI to the design of an application built by using Oracle Forms.

Other Implementation Documentation

Multiple Reporting Currencies in Oracle Applications

This manual details additional steps and setup considerations for implementing the Multiple Reporting Currencies feature.

Multiple Organizations in Oracle Applications

This guide describes how to set up and use the Multiple Organization support feature, so you can define and support different organization structures when running a single installation of Oracle Applications.

Oracle Workflow Guide

This guide explains how to define new workflow business processes as well as customize existing Oracle Applications-embedded workflow processes.You also use this guide to complete the setup steps necessary for any Oracle Applications product that includes workflow-enabled processes.

Oracle Applications Flexfields Guide

This guide provides flexfields planning, setup and reference information. This manual also provides information on creating custom reports on flexfields data.

Oracle eTechnical Reference Manuals

Each eTechnical Reference Manual (eTRM) contains database diagrams and a detailed description of database tables, forms, reports, and programs for a specific Oracle Applications product. This information helps you convert data from your existing applications, integrate Oracle Applications data with non-Oracle applications, and write custom reports for Oracle Applications products. Oracle eTRM is available on Oracle*Metalink*.

Oracle Manufacturing APIs and Open Interfaces Manual

This manual contains up-to-date information about integrating with other Oracle Manufacturing applications and with your other systems. This documentation includes APIs and open interfaces found in Oracle Manufacturing.

Oracle Order Management Suite APIs and Open Interfaces Manual

This manual contains up-to-date information about integrating with other Oracle Manufacturing applications and with your other systems. This documentation includes APIs and open interfaces found in Oracle Order Management Suite.

Oracle Common Application Components Implementation Guide

Many CRM products use components from CRM Application Foundation. Use this guide to correctly implement CRM Application Foundation.

Training and Support

Training

Oracle offers training courses to help you and your staff master Oracle Interaction Blending and reach full productivity quickly. You have a choice of educational environments. You can attend courses offered by Oracle University at any one 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’s 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 Oracle Interaction Blending 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 Oracle8*i* server, and your hardware and software environment.

Oracle*MetaLink*

Oracl*eMetaLink* is your self-service support connection with web, telephone menu, and e-mail alternatives. Oracle supplies these technologies for your convenience, available 24 hours a day, 7 days a week. With Oracl*eMetaLin*k, you can obtain information and advice from technical libraries and forums, download patches, download the latest documentation, look at bug details, and create or update TARs. To use MetaLink, register at (http://metalink.oracle.com).

Alerts: You should check Oracl*eMetaLink* alerts before you begin to install or upgrade any of your Oracle Applications. Navigate to the Alerts page as follows: Technical Libraries/ERP Applications/Applications Installation and Upgrade/Alerts.

Self-Service Toolkit: You may also find information by navigating to the Self-Service Toolkit page as follows: Technical Libraries/ERP Applications/Applications Installation and Upgrade.

Do Not Use Database Tools to Modify Oracle Applications Data

Oracle STRONGLY RECOMMENDS that you never use SQL*Plus, Oracle Data Browser, database triggers, or any other tool to modify Oracle Applications 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 Applications data, you risk destroying the integrity of your data and you lose the ability to audit changes to your data.

Because Oracle Applications tables are interrelated, any change you make using Oracle Applications can update many tables at once. But when you modify Oracle Applications data using anything other than Oracle Applications, 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 Applications.

When you use Oracle Applications to modify your data, Oracle Applications automatically checks that your changes are valid. Oracle Applications 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.

About Oracle

Oracle Corporation develops and markets an integrated line of software products for database management, applications development, decision support, and office automation, as well as Oracle Applications, an integrated suite of more than 160 software modules for financial management, supply chain management, manufacturing, project systems, human resources and customer relationship management.

Oracle products are available for mainframes, minicomputers, personal computers, network computers and personal digital assistants, allowing organizations to integrate different computers, different operating systems, different networks, and even different database management systems, into a single, unified computing and information resource.

Oracle is the world’s leading supplier of software for information management, and the world’s second largest software company. Oracle offers its database, tools, and applications products, along with related consulting, education, and support services, in over 145 countries around the world.

1

Introduction

Topics include:

- Section 1.1, "Oracle Interaction Center Overview"
- Section 1.2, "New in this Release"

1.1 Oracle Interaction Center Overview

Every customer interaction — a telephone call, an e-mail message, or a Web chat conversation — presents an opportunity to win new business or improve customer satisfaction. Oracle Interaction Center supports the management and processing of customer relationship activity across all channels of customer contact.

Oracle Interaction Center integrates with several customer relationship business applications in the Oracle eBusiness Suite. This allows access to centralized customer information and business application functionality.

Oracle Interaction Center consists of several products. The modules relating to inbound telephony and outbound telephony are bundled separately. Oracle Interaction Center products include:

- Section 1.1.1, "Oracle Advanced Inbound Telephony"
- Section 1.1.2, "Oracle Advanced Outbound Telephony"
- Section 1.1.3, "Oracle Customer Interaction History"
- Section 1.1.4, "Oracle Email Center"
- Section 1.1.5, "Oracle Interaction Blending"
- Section 1.1.6, "Oracle Interaction Center Intelligence"
- Section 1.1.7, "Oracle One-to-One Fulfillment"

- Section 1.1.8, "Oracle Scripting"
- Section 1.1.9, "Oracle Universal Work Queue"

See Also

- Section 1.2, "New in this Release"
- Section 1.3, "Modified in this Release"
- Section 1.4, "Obsolete in this Release"

1.1.1 Oracle Advanced Inbound Telephony

Oracle Advanced Inbound Telephony is designed to consistently and effectively handle customer interactions by intelligently routing, queuing and distributing media items. Oracle Advanced Inbound Telephony offers CTI support for market-leading traditional ACD/PBX and IP Telephony platforms, and provides enhanced screen pops on customer data into the Oracle E-Business Suite application. Oracle Advanced Inbound Telephony is fully integrated with Oracle TeleSales, Oracle TeleService and Oracle Collections, thereby minimizing integration time and deployment costs. Oracle Advanced Inbound Telephony also provides the Oracle Telephony Adapter SDK, which can be used to integrate other PBX/ACD and CTI middleware combinations that are not supported by an Oracle telephony adapter.

Oracle Advanced Inbound Telephony is required to telephony enable business applications in the Oracle E-Business Suite. "Telephony-enabled" means that the application can communicate with a telephone system for inbound calls, outbound calls, or both by way of the CTI middleware that handles the messaging between the customer's PBX/ACD and the business application.

The Oracle Advanced Inbound Telephony bundle consists of the following products: Oracle Interaction Center Server Manager, Oracle Universal Work Queue, Oracle Telephony Manager, Oracle Interaction Center Intelligence and Oracle Interaction Blending. Oracle Interaction Center Server Manager is a set of shell scripts and batch files that start, stop and monitor the server processes in an interaction center server group.

See Also

- Section 1.1.2, "Oracle Advanced Outbound Telephony"
- Section 1.1.3, "Oracle Customer Interaction History"
- Section 1.1.4, "Oracle Email Center"

- Section 1.1.5, "Oracle Interaction Blending"
- Section 1.1.6, "Oracle Interaction Center Intelligence"
- Section 1.1.7, "Oracle One-to-One Fulfillment"
- Section 1.1.8, "Oracle Scripting"
- Section 1.1.9, "Oracle Universal Work Queue"

1.1.2 Oracle Advanced Outbound Telephony

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

- A tactical list manager, which determines who to call and when to call them
- An outbound dialing engine, which dials numbers and transfers live contacts to call center agents

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

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

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

See Also

- Section 1.1.1, "Oracle Advanced Inbound Telephony"
- Section 1.1.3, "Oracle Customer Interaction History"
- Section 1.1.4, "Oracle Email Center"

- Section 1.1.5, "Oracle Interaction Blending"
- Section 1.1.6, "Oracle Interaction Center Intelligence"
- Section 1.1.7, "Oracle One-to-One Fulfillment"
- Section 1.1.8, "Oracle Scripting"
- Section 1.1.9, "Oracle Universal Work Queue"

1.1.3 Oracle Customer Interaction History

Oracle Customer Interaction History provides applications with a common framework for capturing and accessing all "interaction" data associated with customer contacts. Oracle Customer Interaction History acts as a central repository and provides a consistent framework for tracking all automated or agent-based customer interactions.

Applications record interactions through the Oracle Customer Interaction History framework itself, or through other applications that use Oracle Customer Interaction History. This information can be accessed by using the Oracle Customer Interaction History user interface, by using the user interface of an application that is integrated with Oracle Customer Interaction History, or by calling the Oracle Customer Interaction History APIs.

See Also

- Section 1.1.1, "Oracle Advanced Inbound Telephony"
- Section 1.1.2, "Oracle Advanced Outbound Telephony"
- Section 1.1.4, "Oracle Email Center"
- Section 1.1.5, "Oracle Interaction Blending"
- Section 1.1.6, "Oracle Interaction Center Intelligence"
- Section 1.1.7, "Oracle One-to-One Fulfillment"
- Section 1.1.8, "Oracle Scripting"
- Section 1.1.9, "Oracle Universal Work Queue"

1.1.4 Oracle Email Center

Oracle Email Center is a comprehensive solution for managing high volumes of inbound and outbound e-mails. Oracle Email Center reduces the cost per email interaction by automatically replying to certain email inquiries as well as routing others to a skilled set of agents and providing them with a full featured console with cross application functionality.

Oracle Email Center increases customer satisfaction and reduces customer attrition by providing quick, accurate and consistent responses. It also increases agent's efficiency through the use of a full featured, Email Center agent console thereby reducing agent turnover.

An easy-to-use graphical user interface called the Self Service Administration console enables the administrator to configure the system, define processing rules and publish business data, while the Supervisor console enables the supervisor to manage email queues and balance workload. In addition, Oracle Interaction Center Intelligence provides a comprehensive set of reports that enable directors and managers to track email activity and relate it to business events. Through its integration with other Oracle E-Business applications, Email Center provides its agents with cross-application functionality and at the same time provides a utility called Message Component to the business applications for viewing, composing and responding to email messages.

See Also

- Section 1.1.1, "Oracle Advanced Inbound Telephony"
- Section 1.1.2, "Oracle Advanced Outbound Telephony"
- Section 1.1.3, "Oracle Customer Interaction History"
- Section 1.1.5, "Oracle Interaction Blending"
- Section 1.1.6, "Oracle Interaction Center Intelligence"
- Section 1.1.7, "Oracle One-to-One Fulfillment"
- Section 1.1.8, "Oracle Scripting"
- Section 1.1.9, "Oracle Universal Work Queue"

1.1.5 Oracle Interaction Blending

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

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

See Also

- Section 1.1.1, "Oracle Advanced Inbound Telephony"
- Section 1.1.2, "Oracle Advanced Outbound Telephony"
- Section 1.1.3, "Oracle Customer Interaction History"
- Section 1.1.4, "Oracle Email Center"
- Section 1.1.6, "Oracle Interaction Center Intelligence"
- Section 1.1.7, "Oracle One-to-One Fulfillment"
- Section 1.1.8, "Oracle Scripting"
- Section 1.1.9, "Oracle Universal Work Queue"

1.1.6 Oracle Interaction Center Intelligence

Oracle Interaction Center Intelligence is a Web-based reporting solution that provides intelligent reports that facilitate day-to-day operational and long-term strategic decisions.

The data is presented to the user in a easy-to-use portal format. This format gives the user a unified, role-based, and easily customized view of Interaction Center information. Data presented includes session information, agent productivity metrics and key performance indicators (e.g., speed to answer and abandon rate).

Oracle Interaction Center Intelligence is built on an Oracle proprietary Java-based technology stack (Oracle CRM Foundation, also known as JTT) and a three-tier architecture:

- The first tier consists of the front end (client) which presents the application through an Oracle Applications-compliant Web browser.
- The middle tier is comprised of the Apache Web server and application server, which included as part of the installation of Oracle Applications release 11*i*.
- The third tier represents the database, which is comprised of an Oracle 8*i* or 9*i* database.

See Also

- Section 1.1.1, "Oracle Advanced Inbound Telephony"
- Section 1.1.2, "Oracle Advanced Outbound Telephony"
- Section 1.1.3, "Oracle Customer Interaction History"

- Section 1.1.4, "Oracle Email Center"
- Section 1.1.5, "Oracle Interaction Blending"
- Section 1.1.7, "Oracle One-to-One Fulfillment"
- Section 1.1.8, "Oracle Scripting"
- Section 1.1.9, "Oracle Universal Work Queue"

1.1.7 Oracle One-to-One Fulfillment

Oracle One-to-One Fulfillment provides Oracle E-Business Suite applications with a centralized mechanism for managing fulfillment. Fulfillment is the process of compiling and distributing information to customers.

Oracle One-to-One Fulfillment consists of an API, a server, an administration user interface called the Administration Console, and an agent interface used by Oracle Sales Online. The Oracle One-to-One Fulfillment API is used by the E-Business Suite applications to initiate a request for fulfillment processing. The fulfillment request identifies the agent or server, the content, and the channel. The Oracle One-to-One Fulfillment server processes the request. It compiles the personalized content and determines the recipients of e-mail, fax, print and physical collateral.

Each business application has a unique interface for making a fulfillment request on behalf of one or more parties. Examples of outbound correspondence in E-Business Suite include:

- Notification letters
- Dunning letters
- Lease terms
- Product information
- Survey e-mail invitations

Sales and marketing collateral

See Also

- Section 1.1.1, "Oracle Advanced Inbound Telephony"
- Section 1.1.2, "Oracle Advanced Outbound Telephony"
- Section 1.1.3, "Oracle Customer Interaction History"
- Section 1.1.4, "Oracle Email Center"

- Section 1.1.5, "Oracle Interaction Blending"
- Section 1.1.6, "Oracle Interaction Center Intelligence"
- Section 1.1.8, "Oracle Scripting"
- Section 1.1.9, "Oracle Universal Work Queue"

1.1.8 Oracle Scripting

Oracle Scripting provides enterprises with scripts which guide customers, agents and employees through decision flows based on a series of questions and answers. Scripts can be used for a variety of purposes: as traditional interaction center scripts that guide agents through collection of information and provide proactive alerts; as Web-based surveys for customers, prospects, and employees; and as self-service Web scripts that integrate with enterprise Web pages and provide a mechanism to guide Web customers through decision processes. Oracle Scripting is composed of several components: Script Author, the Scripting Engine, the Scripting Administration console, and the Survey Administration console.

Script Author is the development tool with which customized business requirements are translated into miniature programs known as "scripts." Each implementation of Oracle Scripting employs at least one customized script built by Oracle Consulting, consulting partners, or the enterprise. There are various ways in which scripts can be employed to gather or distribute data for an enterprise. For example, a script can serve to unify an agent’s desktop by integrating aspects of various applications, or as a survey questionnaire to solicit specific information from the sample or target population. Script Author offers two ways to create a script; a graphical layout tool and a Script Wizard component.

The Scripting Engine is responsible for displaying the script to the end user, interpreting the end user’s responses to questions and answers, and processing custom code developed in support of the script. The Scripting Engine includes two interfaces (one for agents, and one for executing a script using a Web browser). Any script executed in the Web interface requires survey campaign administration.

The Scripting Administration console provides the user interface with which script developers can launch Script Author as a Java applet, and script administrators can administer Oracle Scripting files, as well as generate, view and analyze a panel footprint report.

The Survey Administration console provides the user interface with which survey administrators establish and maintain survey campaign information, define and manage survey deployments, and view responses from data received.

See Also

- Section 1.1.1, "Oracle Advanced Inbound Telephony"
- Section 1.1.2, "Oracle Advanced Outbound Telephony"
- Section 1.1.3, "Oracle Customer Interaction History"
- Section 1.1.4, "Oracle Email Center"
- Section 1.1.5, "Oracle Interaction Blending"
- Section 1.1.6, "Oracle Interaction Center Intelligence"
- Section 1.1.7, "Oracle One-to-One Fulfillment"
- Section 1.1.9, "Oracle Universal Work Queue"

1.1.9 Oracle Universal Work Queue

Oracle Universal Work Queue provides one click access to work. It brings media queues, prioritized application work queues, work items and messages together in a single access point. Applications integrate with Oracle Universal Work Queue to enable customer channels and to centralize access to application work items. Customer channels deliver media (inbound telephone calls, outbound telephone calls, web callbacks, web collaboration requests and e-mail) to applications through Oracle Universal Work Queue. Applications generate work items (e.g., service requests, leads, opportunities, tasks) and distribute them through assignment, queues and work pools. Oracle Universal Work Queue provides the unifying link between media queues, prioritized application work queues, application work items and Oracle E-Business applications.

See Also

- Section 1.1.1, "Oracle Advanced Inbound Telephony"
- Section 1.1.2, "Oracle Advanced Outbound Telephony"
- Section 1.1.3, "Oracle Customer Interaction History"
- Section 1.1.4, "Oracle Email Center"
- Section 1.1.5, "Oracle Interaction Blending"
- Section 1.1.6, "Oracle Interaction Center Intelligence"
- Section 1.1.7, "Oracle One-to-One Fulfillment"
- Section 1.1.8, "Oracle Scripting"

1.2 New in this Release

The following features are new in this release.

- Service Plan Templates
- Regional Service Plans

See Also

- Section 1.1, "Oracle Interaction Center Overview"
- Section 1.3, "Modified in this Release"
- Section 1.4, "Obsolete in this Release"

1.2.1 Service Plan Templates

You can use an existing, user-defined, service plan as a template for a new service plan. This feature copies service level assignments only. It does not copy contact channel assignment or regional service plans.

1.2.2 Regional Service Plans

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

1.3 Modified in this Release

The following features are modified in this release.

- Service Levels
- Service Plans
- Oracle Interaction Blending Administration Console

See Also

- Section 1.1, "Oracle Interaction Center Overview"
- Section 1.2, "New in this Release"
- Section 1.4, "Obsolete in this Release"

1.3.1 Service Levels

Service levels define the goals for servicing contact channels. In previous releases, this was called a service plans.

1.3.2 Service Plans

Service plans specify the desired level of service for a particular time of day. In previous releases, this was called a service category.

1.3.3 Oracle Interaction Blending Administration Console

The Oracle Interaction Blending administration console has been integrated with Call Center HTML Administration. The new Blending tab allows you to set up service levels and service plans. Use the Call Center HTML Administration responsibility to access the Oracle Interaction Blending administration console.

1.4 Obsolete in this Release

The following features are obsolete in the release.

- Interaction Blending Administrator Responsibility

See Also

- Section 1.1, "Oracle Interaction Center Overview"
- Section 1.2, "New in this Release"
- Section 1.3, "Modified in this Release"

1.4.1 Interaction Blending Administrator Responsibility

The Interaction Blending Administrator responsibility is obsolete. Use the Call Center HTML Administration responsibility to access to Oracle Interaction Blending administration console. The Oracle Interaction Blending administration console appears as a Blending tab in Call Center HTML Administration.

1.4.2 Blending Service Tab

The Blending server is obsolete. Oracle Interaction Blending server are managed in the ISCM tab of Call Center HTML Administration. Use the Call Center HTML Administration responsibility to access to Call Center HTML Administration.

1.4.3 Service Categories

Service categories have been replaced with service plans. Service plans specify the desired level of service for a particular time of day.

2

Detailed Product Description

This chapter described the concepts required to understand implementation and administration tasks. Topics include:

- Section 2.1, "Oracle Interaction Blending Overview"
- Section 2.2, "Concepts"

2.1 Oracle Interaction Blending Overview

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

Use the ICSM tab in the Call Center HTML Administration console to set up and manage server groups. Use the Blending tab to define service levels for inbound contact channels (inbound telephony and web callbacks) and outbound contact channels (outbound telephony).

2.2 Concepts

Topics include:

- Section 2.2.1, "Service Plan"
- Section 2.2.2, "Service Level"

2.2.1 Service Plan

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

There are two types of services plans: inbound and outbound. Inbound service plans are applied to one or more inbound contact channels (classifications). Outbound service plans are applied to one or more outbound contact channels (campaigns). Service plans are also applied to a specific media type (for example inbound telephony or web callbacks). Oracle Interaction Blending server delivers media to agents assigned to the contact channels according to the service levels set in the service plan.

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

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

Regional Service Plans

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

See Also

Section 5.1, "Interaction Blending Service Levels"

2.2.2 Service Level

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

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

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

Inbound Service Level Example

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

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

Outbound Service Level Example

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

- Hourly Rate: 550
- Minimum Agents: 5

See Also

Section 5.1, "Interaction Blending Service Levels"

3

Before You Begin

This chapter describes the system requirements and product dependencies for Oracle Interaction Blending. It also describes how to access the administrative console for Oracle Interaction Blending.

Topics include:

- Section 3.1, "Mandatory Dependencies"
- Section 3.2, "Related Documentation"
- Section 3.3, "Installing Oracle Interaction Blending"
- Section 3.4, "Accessing Oracle Interaction Blending"

3.1 Mandatory Dependencies

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

- Oracle Advanced Inbound Telephony
- Oracle Advanced Outbound Telephony
- Oracle Universal Work Queue

Oracle Advanced Inbound Telephony

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

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

Oracle Advanced Outbound Telephony

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

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

Oracle Universal Work Queue

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

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

3.2 Related Documentation

The latest product documentation is available on Oracle*MetaLink* at http://metalink.oracle.com.

3.3 Installing Oracle Interaction Blending

You have the following options for installing Oracle Interaction Blending:

- Oracle Applications Rapid Install

  The Rapid Install is intended for customers who are installing Oracle Applications for the first time or upgrading to Release 11i from to Release 11.0 or Release 10.7. It contains the family packs or product minipacks for all products in Oracle Applications.

  The Rapid Install is provided on CD-ROMs and is available from Oracle Store at http://oraclestore.oracle.com. For information about installing Oracle Applications using Rapid Install, see *Installing Oracle Applications*. For information about upgrading Oracle Applications using Rapid Install, see *Upgrading Oracle Applications*.

- Oracle Applications Maintenance Pack

The Maintenance Pack is intended for customers who have already installed Oracle Applications Release 11i. It contains the family packs or product minipacks for all products in Oracle Applications.

The Maintenance Pack is provided as a patch and is available on Oracle*MetaLink* at http://metalink.oracle.com. For information about upgrading Oracle Applications Release 11i using the Maintenance Pack, see Maintenance Pack Release Instructions on Oracle*MetaLink* at http://metalink.oracle.com.

- Oracle Interaction Center Family Pack

  The Oracle Interaction Center Family Pack are intended for customers who have already installed or upgraded to Oracle Applications Release 11i and wish to upgrade only Oracle Interaction Center. The family pack is cumulative and contains only the minipacks for products in the Oracle Interaction Center family.

  > **Note:** Oracle Interaction Center products integrate with other products in Oracle Applications. Therefore, you may have to install family packs, product minipacks, or individual product patches for other products before installing the Oracle Interaction Center Family Pack.

  The Oracle Interaction Center Family Pack is provided as a patch and is available on OracleMetaLink at http://metalink.oracle.com. The readme and patch list for the Oracle Interaction Center Family Pack are available on OracleMetaLink at http://metalink.oracle.com.

3.4 Accessing Oracle Interaction Blending

The product interfaces are accessed by providing the Uniform Resource Locator (URL) for the environment in an Oracle Applications 11i-compliant Web browser and navigating to the hyperlink for the login page for the specific technology stack. You can also provide the URL for the specific login page. This URL is referred to as your login URL.

Oracle Applications URL Use this URL to navigate to the E-Business Home Page URL or the CRM Home page URL.

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

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

CRM Home Page URL This URL is sometimes referred to as the Apache or JTF login URL. Use this URL to open the login page for HTML-based applications.

`http://<host>:<port>/OA_HTML/jtflogin.jsp`

E-Business Home Page URL: This URL is sometimes referred to as the Self-Service Web Applications or SSWA login URL. Use this URL to open the login window for Oracle Applications via the E-Business Home Page. You can access Forms-based or HTML-based applications from the Personal Home Page.

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

3.4.1 User Accounts

An application user is an authorized user of Oracle Applications and is uniquely identified by a username. After the user account has been defined, the application user can sign on to Oracle Applications at the E-Business Home Page or CRM Home Page login.

Note: Oracle Applications is installed with a system defined username and password.

- Username: sysadmin
- Password: sysadmin

An application user enters a username along with a password to sign on to Oracle Applications. The password assigned by the system administrator is temporary. When signing on for the first time, the application user will be prompted to change the password. Access to specific functionality and data will be determined by the responsibilities assigned to your user account.

3.4.2 Responsibilities

A system administrator assigns one or more responsibilities to an application user. A responsibility is a level of authority that allows a user to access specific functionality and data in Oracle Applications. Oracle Applications is installed with predefined responsibilities. A system administrator can modify a predefined responsibility or create custom responsibilities.

The following table describes the predefined responsibilities that are used to implement Oracle Interaction Blending.

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

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

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

4

Implementation Tasks

There are a number of procedures which must be completed in order to implement Oracle Interaction Blending. This chapter provides a high-level overview of the implementation task sequence and references to procedures that are performed during the course of an implementation.

Topics include:

- Section 4.1, "Implementation Task Sequence"
- Section 4.2, "Defining an Administrator"

4.1 Implementation Task Sequence

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

Step	Required	Description	Responsibility
1	Yes	**Create an Oracle Interaction Blending administrator.** You will use this user account to perform the remaining steps. See: Section 4.2, "Defining an Administrator"	System Administrator

Step	Required	Description	Responsibility
2	Yes, for inbound service plans	**For inbound service plans, create inbound contact channels (classifications).** Contact channels are assigned to service plans. See: *Oracle Advanced Inbound Telephony Implementation Guide*	Call Center HTML Administration
3	Yes, for outbound service plans	**For outbound service plans, create outbound contact channels (campaigns).** Contact channels are assigned to service plans. See: *Oracle Advanced Outbound Telephony Implementation Guide*	Call Center HTML Administration
4	Yes	**Add an Interaction Blending server to an interaction center server group.** See: *Oracle Interaction Center Server Manager Implementation Guide*	Call Center HTML Administration
5	Yes, for active blending (not required for passive blending)	**Enable active mode for the Oracle Telephony Manager server in the server group.** See: *Oracle Advanced Inbound Telephony Implementation Guide*	Call Center HTML Administration
6	Yes	**Create service levels.** See: Section 5.1.1, "Creating an Inbound Service Level" or Section 5.1.2, "Creating an Outbound Service Level"	Call Center HTML Administration
7	Yes	**Create a service plan.** See: Section 5.2.1, "Creating an Inbound Service Plan" or Section 5.2.2, "Creating an Outbound Service Plan"	Call Center HTML Administration
8	No	**Add a regional plan to the service plan.** See: Section 5.2.8, "Adding a Regional Plan"	Call Center HTML Administration
9	Yes	**Configure Oracle Universal Work Queue profile options for Oracle Interaction Blending.** See: Appendix A, "Profile Options"	System Administrator

See Also

- Section 4.2, "Defining an Administrator"

4.2 Defining an Administrator

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

Login

E-Business Home Page

Responsibility

System Administrator

Prerequisites

None

Steps

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

   The User window appears.

   Use the following guidelines to define Oracle Applications user names:

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

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

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

   Use the following guidelines to define Oracle Applications passwords:

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

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

   The cursor remains in the Password field.

4. Enter the password again to verify it.
5. If you want to use this account to submit concurrent programs for Oracle Interaction Blending, then select an employee to associate with this user account from the Person field.
6. In the Responsibilities tab, add the following responsibilities:

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

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

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

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

   You may close the Users window.

See Also

- Section 4.1, "Implementation Task Sequence"

5

Administration Tasks

This chapter describes task-based procedures for administering Oracle Interaction Blending. Topics include:

- Section 5.1, "Interaction Blending Service Levels"
- Section 5.2, "Interaction Blending Service Plans"

5.1 Interaction Blending Service Levels

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

Tasks

You can perform the following tasks:

- Section 5.1.1, "Creating an Inbound Service Level"
- Section 5.1.2, "Creating an Outbound Service Level"
- Section 5.1.3, "Updating a Service Level"
- Section 5.1.4, "Removing a Service Level"

Concepts

- Service Level
- Service Plan

See Also

- Section 5.2, "Interaction Blending Service Plans"

5.1.1 Creating an Inbound Service Level

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

Login

Oracle HTML Applications

Responsibility

Call Center HTML Administration

Prerequisites

None

Steps

1. Click the Blending tab.

   The Service Plans page appears.

2. Click the Service Levels subtab.

   The Service Levels page appears.

3. Click **Create Service Level.**

   The Create Service Level page appears.

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

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

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

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

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

7. Click **Continue**.

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

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

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

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

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

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

11. Click **Submit**.

See Also

- Section 5.1.2, "Creating an Outbound Service Level"
- Section 5.1.3, "Updating a Service Level"
- Section 5.1.4, "Removing a Service Level"

5.1.2 Creating an Outbound Service Level

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

Login

Oracle HTML Applications

Responsibility

Call Center HTML Administration

Prerequisites

None

Steps

1. Click the Blending tab.

   The Service Plans page appears.

2. Click the Service Levels subtab.

   The Service Levels page appears.

3. Click **Create Service Level.**

The Create Service Level page appears.

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

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

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

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

6. In the Direction field, select **Outbound**.
7. Click **Continue**.
8. In the Hourly Rate field, enter the target number of outbound contact attempts in a hour.
9. In the Minimum Agents field, enter the minimum number of agents that must be available to attempt outbound contact when meeting this service level.

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

10. Click **Submit**.

See Also

- Section 5.1.1, "Creating an Inbound Service Level"
- Section 5.1.3, "Updating a Service Level"
- Section 5.1.4, "Removing a Service Level"

5.1.3 Updating a Service Level

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

Use this procedure to update a service level.

Login

Oracle HTML Applications

Responsibility

Call Center HTML Administration

Prerequisites

None

Steps

1. Click the Blending tab.

   The Service Plans page appears.

2. Click the Service Levels subtab.

   The Service Levels page appears.

3. Click a Service Level Name hyperlink.

   The Service Level Details page appears.

4. Modify the appropriate fields.
5. Click **Apply**.

See Also

- Section 5.1.1, "Creating an Inbound Service Level"
- Section 5.1.2, "Creating an Outbound Service Level"
- Section 5.1.4, "Removing a Service Level"

5.1.4 Removing a Service Level

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

Login

Oracle HTML Applications

Responsibility

Call Center HTML Administration

Prerequisites

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

Steps

1. Click the Blending tab.

   The Service Plans page appears.

2. Select the Service Levels subtab.

   The Service Levels page appears.

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

4. Click **Apply**.

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

See Also

- Section 5.1.1, "Creating an Inbound Service Level"
- Section 5.1.2, "Creating an Outbound Service Level"
- Section 5.1.3, "Updating a Service Level"

5.2 Interaction Blending Service Plans

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

Tasks

You can perform the following tasks:

- Section 5.2.1, "Creating an Inbound Service Plan"
- Section 5.2.2, "Creating an Outbound Service Plan"
- Section 5.2.3, "Updating Service Level Assignments"
- Section 5.2.4, "Updating a Contact Channel Assignments"
- Section 5.2.5, "Adding a Plan Exception"
- Section 5.2.6, "Updating a Plan Exception"
- Section 5.2.7, "Removing a Service Plan"

- Section 5.2.8, "Adding a Regional Plan"
- Section 5.2.9, "Updating a Regional Plan"
- Section 5.2.10, "Removing a Regional Plan"

Concepts

- Service Plan
- Service Level

See Also

- Section 5.1, "Interaction Blending Service Levels"

5.2.1 Creating an Inbound Service Plan

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

Login

Oracle HTML Applications

Responsibility

Call Center HTML Administration

Prerequisites

None

Steps

1. Click the Blending tab.

   The Service Plans page appears.

2. Click **Create Service Plan.**

   The Create Service Plan page appears.

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

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

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

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

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

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

6. In the Media Type field, select a media type.

   You have the following options:

   - Inbound Telephony
   - Web Callback

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

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

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

8. Click **Continue**.

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

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

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

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

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

      The week view displays the assigned service level.

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

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

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

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

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

       A day view appears with the assigned service levels. To assign additional service levels, see Updating a Plan Exception.

11. Click **Continue**.

The Create Service Plan Assignment page appears.

12. Assign inbound contact channels to the service plan.
13. Click **Submit**.

See Also

- Section 5.2.2, "Creating an Outbound Service Plan"
- Section 5.2.3, "Updating Service Level Assignments"
- Section 5.2.4, "Updating a Contact Channel Assignments"
- Section 5.2.5, "Adding a Plan Exception"
- Section 5.2.6, "Updating a Plan Exception"
- Section 5.2.7, "Removing a Service Plan"
- Section 5.2.8, "Adding a Regional Plan"
- Section 5.2.9, "Updating a Regional Plan"
- Section 5.2.10, "Removing a Regional Plan"

5.2.2 Creating an Outbound Service Plan

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

Login

Oracle HTML Applications

Responsibility

Call Center HTML Administration

Prerequisites

None

Steps

1. Click the Blending tab.

   The Service Plans page appears.

2. Click **Create Service Plan.**

The Create Service Plan page appears.

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

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

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

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

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

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

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

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

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

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

8. Click **Continue**.

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

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

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

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

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

      The week view displays the assigned service level.

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

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

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

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

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

A day view appears with the assigned service levels. To assign additional service levels, see Updating a Plan Exception.

11. Click **Continue**.

    The Create Service Plan Assignment page appears.

12. Assign outbound contact channels to the service plan.
13. Click **Submit**.

See Also

- Section 5.2.1, "Creating an Inbound Service Plan"
- Section 5.2.3, "Updating Service Level Assignments"
- Section 5.2.4, "Updating a Contact Channel Assignments"
- Section 5.2.5, "Adding a Plan Exception"
- Section 5.2.6, "Updating a Plan Exception"
- Section 5.2.7, "Removing a Service Plan"
- Section 5.2.8, "Adding a Regional Plan"
- Section 5.2.9, "Updating a Regional Plan"
- Section 5.2.10, "Removing a Regional Plan"

5.2.3 Updating Service Level Assignments

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

Login

Oracle HTML Applications

Responsibility

Call Center HTML Administration

Prerequisites

None

Steps

1. Click the Blending tab.

The Service Plans page appears.

2. Click a Service Plan Name hyperlink.

   The Service Plan Overview page appears.

3. In the side panel, click **Service Plan Details**.
4. Modify the service level assignments.
5. Click **Apply**.

See Also

- Section 5.2.1, "Creating an Inbound Service Plan"
- Section 5.2.2, "Creating an Outbound Service Plan"
- Section 5.2.4, "Updating a Contact Channel Assignments"
- Section 5.2.5, "Adding a Plan Exception"
- Section 5.2.6, "Updating a Plan Exception"
- Section 5.2.7, "Removing a Service Plan"
- Section 5.2.8, "Adding a Regional Plan"
- Section 5.2.9, "Updating a Regional Plan"
- Section 5.2.10, "Removing a Regional Plan"

5.2.4 Updating a Contact Channel Assignments

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

Login

Oracle HTML Applications

Responsibility

Call Center HTML Administration

Prerequisites

None

Steps

1. Click the Blending tab.

The Service Plans page appears.

2. Click a Service Plan Name hyperlink.

   The Service Plan Overview page appears.

3. Modify the contact channel assignments.
4. Click **Apply**.

See Also

- Section 5.2.1, "Creating an Inbound Service Plan"
- Section 5.2.2, "Creating an Outbound Service Plan"
- Section 5.2.3, "Updating Service Level Assignments"
- Section 5.2.5, "Adding a Plan Exception"
- Section 5.2.6, "Updating a Plan Exception"
- Section 5.2.7, "Removing a Service Plan"
- Section 5.2.8, "Adding a Regional Plan"
- Section 5.2.9, "Updating a Regional Plan"
- Section 5.2.10, "Removing a Regional Plan"

5.2.5 Adding a Plan Exception

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

Login

Oracle HTML Applications

Responsibility

Call Center HTML Administration

Prerequisites

None

Steps

1. Click the Blending tab.

The Service Plans page appears.

2. Click a Service Plan Name hyperlink.

   The Service Plan Overview page appears.

3. In the side panel, click **Service Plan Details**.
4. In the Specific/Exception Dates area, in the Add field, type or select a date.
5. In the Time Range field, select a start and end time of the time interval to which the service level will be assigned.
6. From the Level of Service list, select a service level and then click **Set**.

   A day view appears with the assigned service levels.

7. Click **Apply**.

   The Service Plan Details page refreshes.

8. In the Specific/Exception Dates area, from the Select list, select the exception date.
9. To assign additional service levels to the exception date, repeat the following steps:
   a. In the Time Range field, select a start and end time of the time interval to which the service level will be assigned.
   b. From the Level of Service list, select a service level and then click **Set**.
10. Click **Apply**.

See Also

- Section 5.2.1, "Creating an Inbound Service Plan"
- Section 5.2.2, "Creating an Outbound Service Plan"
- Section 5.2.3, "Updating Service Level Assignments"
- Section 5.2.4, "Updating a Contact Channel Assignments"
- Section 5.2.6, "Updating a Plan Exception"
- Section 5.2.7, "Removing a Service Plan"
- Section 5.2.8, "Adding a Regional Plan"
- Section 5.2.9, "Updating a Regional Plan"
- Section 5.2.10, "Removing a Regional Plan"

5.2.6 Updating a Plan Exception

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

Login

Oracle HTML Applications

Responsibility

Call Center HTML Administration

Prerequisites

None

Steps

1. Click the Blending tab.

   The Service Plans page appears.

2. Click a Service Plan Name hyperlink.

   The Service Plan Overview page appears.

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

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

   A day view appears with the assigned service levels.

5. To update the service level assignments, repeat the following steps:

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

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

6. Click **Apply**.

See Also

- Section 5.2.1, "Creating an Inbound Service Plan"
- Section 5.2.2, "Creating an Outbound Service Plan"
- Section 5.2.3, "Updating Service Level Assignments"
- Section 5.2.4, "Updating a Contact Channel Assignments"

- Section 5.2.5, "Adding a Plan Exception"
- Section 5.2.7, "Removing a Service Plan"
- Section 5.2.8, "Adding a Regional Plan"
- Section 5.2.9, "Updating a Regional Plan"
- Section 5.2.10, "Removing a Regional Plan"

5.2.7 Removing a Service Plan

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

Login

Oracle HTML Applications

Responsibility

Call Center HTML Administration

Prerequisites

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

Steps

1. Click the Blending tab.

   The Service Plans page appears.

2. Select the Remove box for the service plan that you want to delete.
3. Click **Apply**.

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

See Also

- Section 5.2.1, "Creating an Inbound Service Plan"
- Section 5.2.2, "Creating an Outbound Service Plan"
- Section 5.2.3, "Updating Service Level Assignments"

- Section 5.2.4, "Updating a Contact Channel Assignments"
- Section 5.2.5, "Adding a Plan Exception"
- Section 5.2.6, "Updating a Plan Exception"
- Section 5.2.8, "Adding a Regional Plan"
- Section 5.2.9, "Updating a Regional Plan"
- Section 5.2.10, "Removing a Regional Plan"

5.2.8 Adding a Regional Plan

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

Login

Oracle HTML Applications

Responsibility

Call Center HTML Administration

Prerequisites

Create a service plan.

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

Steps

1. Click the Blending tab.

   The Service Plans page appears.

2. Click a Service Plan Name hyperlink.

   The Service Plan Overview page appears.

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

   The Regional Plans page appears.

4. Click **Create Regional Plan**.

   The Create Regional Plan page appears.

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

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

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

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

7. Click **Continue**.

   The Create Regional Plan Details page appears.

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

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

10. In the Time Range field, enter the start and end time for the regional plan.

11. In the Level of Service field, select the service level for the plan.

12. Click **Set**.

13. Click **Continue**.

    The Group Assignment page appears.

14. In the Available Groups column, select the group or groups that you want to assign to the service plan.

15. Click **Submit**.

See Also

- Section 5.2.1, "Creating an Inbound Service Plan"
- Section 5.2.2, "Creating an Outbound Service Plan"
- Section 5.2.3, "Updating Service Level Assignments"
- Section 5.2.4, "Updating a Contact Channel Assignments"
- Section 5.2.5, "Adding a Plan Exception"
- Section 5.2.6, "Updating a Plan Exception"
- Section 5.2.7, "Removing a Service Plan"
- Section 5.2.9, "Updating a Regional Plan"
- Section 5.2.10, "Removing a Regional Plan"

5.2.9 Updating a Regional Plan

Use this procedure to update a regional plan.

Login

Oracle HTML Applications

Responsibility

Call Center HTML Administration

Prerequisites

None

Steps

1. Click the Blending tab.

   The Service Plans page appears.

2. In the Regional Customization column, select a regional plan and then click **Go**.

   The Regional Plan Details page appears.

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

See Also

- Section 5.2.1, "Creating an Inbound Service Plan"
- Section 5.2.2, "Creating an Outbound Service Plan"
- Section 5.2.3, "Updating Service Level Assignments"
- Section 5.2.4, "Updating a Contact Channel Assignments"
- Section 5.2.5, "Adding a Plan Exception"
- Section 5.2.6, "Updating a Plan Exception"
- Section 5.2.7, "Removing a Service Plan"
- Section 5.2.8, "Adding a Regional Plan"

- Section 5.2.10, "Removing a Regional Plan"

5.2.10 Removing a Regional Plan

Use this procedure to delete a regional plan.

Login

Oracle HTML Applications

Responsibility

Call Center HTML Administration

Prerequisites

None

Steps

1. Click the Blending tab.

   The Service Plans page appears.

2. Click a Service Plan Name hyperlink.

   The Service Plan Overview page appears.

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

   The Regional Plans page appears.

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

See Also

- Section 5.2.1, "Creating an Inbound Service Plan"
- Section 5.2.2, "Creating an Outbound Service Plan"
- Section 5.2.3, "Updating Service Level Assignments"
- Section 5.2.4, "Updating a Contact Channel Assignments"
- Section 5.2.5, "Adding a Plan Exception"
- Section 5.2.6, "Updating a Plan Exception"
- Section 5.2.7, "Removing a Service Plan"

- Section 5.2.8, "Adding a Regional Plan"
- Section 5.2.9, "Updating a Regional Plan"

A

Profile Options

This appendix provides a listing of the system profile options used by Oracle Interaction Blending.

Topics include:

- Section A.1, Setting System Profile Options
- Section A.2, Blending Profile Options

A.1 Setting System Profile Options

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

Login

E-Business Home Page

Responsibility

System Administrator

Prerequisites

- Review *Oracle Applications Systems Administrator's Guide*.

Steps

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

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

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

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

3. If you want to display profile options both with and without values, select the Profiles with No Values box.
4. If you want to display profile options that include a specific character string, enter the string in the Profile field.

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

   The System Profile Values window appears.
6. Set the values for the profile options at one or more levels.

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

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

A.2 Blending Profile Options

Each profile option description includes the following information:

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

Profile options include:

- IEU: Blending Style
- IEU: Blending: Timeout
- IEU: Queue Order: Blended

A.2.1 IEU: Blending Style

Note: This profile option applies to media work.

Use this Oracle Universal Work Queue profile option to enable the blending of media work. A Blended node appears in the Universal Work Queue work selector. When an agent requests work from the Blended node, Oracle Interaction Blending will deliver any media type for which the agent is enabled (e.g., inbound telephony, web callbacks, or outbound telephony), according to the service levels set for the service plan.

Required

No

Personal Profile Levels

Update	View
Yes	No

System Profile Levels

Site	Application	Responsibility	User
Yes	Yes	Yes	Yes

Profile Settings

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

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

Default Value

Not Blended

A.2.2 IEU: Blending: Timeout

Note: This profile option applies to media work.

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

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

Required

No

Personal Profile Levels

Update	View
No	No

System Profile Levels

Site	Application	Responsibility	User
Yes	Yes	Yes	Yes

Profile Settings

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

Default Value

No

A.2.3 IEU: Queue Order: Blended

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

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

Required

No

Personal Profile Levels

Update	View
Yes	No

System Profile Levels

Site	Application	Responsibility	User
Yes	Yes	Yes	Yes

Profile Settings

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

Default Value

Not applicable

B

Server Parameters

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

For information about how to manage interaction center servers, including setting server parameters, see *Oracle Interaction Center Server Manager Implementation Guide*.

Topics include:

- Interaction Blending Server Parameters
- Interaction Blending Advanced Server Settings

B.1 Interaction Blending Server Parameters

Server parameters for Oracle Interaction Blending include:

- Agent Migration Dampening Factor
- Agent Status Check Interval (Sec.)
- Campaign Status Check Interval (Sec.)
- DB Connection Status Check Interval (Sec.)
- Service Category Calculation Interval (Sec.)

B.1.1 Agent Migration Dampening Factor

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

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

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

B.1.2 Agent Status Check Interval (Sec.)

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

B.1.3 Campaign Status Check Interval (Sec.)

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

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

B.1.4 DB Connection Status Check Interval (Sec.)

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

B.1.5 Service Category Calculation Interval (Sec.)

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

B.2 Interaction Blending Advanced Server Settings

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

- Java Options
- Server Arguments

B.2.1 Java Options

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

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

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

B.2.2 Server Arguments

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

Type	**Value**
string	-trace all -log