G*plus* Adapter 7.5

G*plus* Adapter for Siebel CRM

User's Guide

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Preface

Welcome to the *G*plus *Adapter 7.5 for Siebel CRM User's Guide*. The primary purpose of this guide is to familiarize readers with what the G*plus* Adapter for Siebel CRM makes possible in your contact center environment. Different types of information are presented for different types of users:

- Architecture, design, and technical information is presented for system integrators.
- Desktop interfaces for each media type are included for agents.
- Administration interfaces show agent and telephony configuration using Siebel administration screens.

The G*plus* Adapter 7.5 for Siebel CRM is a software solution that provides seamless integration between Siebel CRM and Genesys 7 solutions. This combination brings together Siebel's leading software applications and Genesys' contact center solutions.

The G*plus* Adapter provides a single point of access to contact information. The Adapter brings together multiple media and channels, and provides access to the power of Siebel software, promoting better contact relationships overall.

More information about the G*plus* Adapter's system requirements, installation, and configuration is provided in the *G*plus *Adapter 7.5 for Siebel CRM Deployment Guide*.

Note: This document is valid only for Genesys Release 7.5 of the G*plus* Adapter product. To see documents created for other releases of this product, please visit the Genesys Technical Support website, or request the Documentation Library CD, which you can order by e-mail from Genesys Order Management at orderman@genesyslab.com.

This chapter includes the following sections:

- Intended Audience, page 8
- Chapter Summaries, page 8
- Document Conventions, page 9
- Related Resources, page 11
- Making Comments on This Document, page 12

Intended Audience

This guide targets these types of users:

- System integrators implementing the G*plus* Adapter for Siebel CRM software in a contact center environment.
- Supervisors and agents using the integrated applications for customer interaction management, resource management, and outbound campaigns.
- Supervisors and managers who wish to manage call lists and outbound campaigns.

This guide may also be helpful to:

- Customers who have purchased G*plus* Adapter for Siebel CRM and want to become familiar with the delivered solution.
- Genesys Partners and value-added resellers.
- Customers using G*plus* Adapter for Siebel CRM for contact center pilot projects.
- Large enterprise customers where G*plus* Adapter for Siebel CRM is used on a divisional or departmental basis.

Chapter Summaries

To help you locate information, the guide begins with a Table of Contents and ends with an Index. The guide contains the following chapters in addition to this Preface:

- Chapter 1, “Introduction,” on page 13, defines G*plus* Adapter for Siebel CRM, lists the required and recommended Genesys and Siebel components, summarizes the Siebel Call Center application, and lists the integrated solution functionality and customer benefits.
- Chapter 2, “Overview,” on page 17, describes the integrated solution, presents an architecture overview, shows the unified login and integrated desktops, discusses e-mail route and Siebel Communication Commands, and summarizes real-time configuration synchronization.
- Chapter 3, “Agent Information,” on page 37, contains diagrams and flows for those people implementing the G*plus* Adapter for Siebel CRM software in a contact center environment.
- Chapter 4, “Administrator’s Information,” on page 81, describes how to perform agent and telephony configuration through Siebel administration screens.
- Chapter 5, “Troubleshooting,” on page 137, provides solutions to some common problems.

Document Conventions

This guide uses the following document conventions:

Words and Terminology

Throughout this document, the Voice, Multimedia, and Media Routing components of the G*plus* Adapter are categorized as "driver-based components," whereas the Configuration Synchronization, Campaign Synchronization, Communication Server, and UCS Gateway components of the G*plus* Adapter are called "server-based components."

Document Version Number

A version number appears at the bottom of the inside front cover of this document. Version numbers change as new information is added to this document. Here is a sample version number:

`75gp_us_slcrm_08-2007_v7.5.001.00`

You will need this number when you are talking with Genesys Technical Support about this product.

Type Styles

Italic

In this document, italic is used for the titles of documents, when a term is being defined, for emphasis, and for mathematical variables.

Examples

- Please consult the *Genesys 7 Migration Guide* for more information.
- *A customary and usual practice* is one that is widely accepted and used within a particular industry or profession.
- Do *not* use this value for this option.
- The formula, $x + 1 = 7$ where x stands for . . .

Monospace Font

A monospace font, which is shown in the following examples, is used for:

- All programming identifiers and GUI elements. This convention includes the *names* of directories, files, folders, configuration objects, paths, scripts, dialog boxes, options, fields, text and list boxes, operational modes, all buttons including radio buttons, check boxes, commands, tabs, CTI events, and error messages; the values of options; logical arguments and command syntax; and code samples.

Examples

- Select the `Show variables on screen` check box.
- Click the `Summation` button.
- In the `Properties` dialog box, enter the value for the host server in your environment.
- In the `Operand` text box, enter your formula.
- Click `OK` to exit the `Properties` dialog box.
- The following table presents the complete set of error messages T-Server® distributes in `EventError` events.
- If you select `true` for the `inbound-bsns-calls` option, all established inbound calls on a local agent are considered business calls.

- For any text the user must manually enter during a configuration or installation procedure:

Example

- Enter `exit` at the command line.

Information About Screen Captures Used in This Document

Screen captures taken from the product GUI (graphical user interface) and used in this document may contain minor errors in spelling, capitalization, or grammar. The text accompanying and explaining the screen captures corrects such errors *except* when such a correction would prevent you from installing, configuring, or successfully using the product. For example, if an option in the Siebel user interface contains a spelling error, then this document may use the name exactly as it appears in that Siebel user interface; such errors are not necessarily corrected in any accompanying text.

Use of Square Brackets

In any logical arguments, commands, and programming syntax presented in this document, square brackets are used to indicate that a particular parametric value is optional. That is, the value is not required to resolve a command, argument, or programming syntax. The customer/user decides whether to supply a value and what that value is. Here is a sample:

```
smcp_server -host [/flags]s
```

Use of Angle Brackets

Angle brackets are used to indicate that a value in a logical argument, command, or programming syntax is required, but that the user must supply the data for the value. Because the value is specific to an individual enterprise—for example, DNs or port numbers—the program cannot predict (that is, program in) what the value is. Here is a sample:

```
smcp_server -host <confighost>
```

Related Resources

For information about G*plus* Adapter for Siebel CRM not covered in this guide, consult these documents:

- *G*plus *Adapter 7.5 for Siebel CRM Deployment Guide*. Lists system requirements and describes how to install and configure G*plus* Adapter.
- *G*plus *Adapter 7.5 for Siebel CRM Developer's Guide*. Describes the API (application programming interface) which you can customize the export of campaigns, campaign contacts, and Do Not Call requests from Siebel to Genesys software. Also describes APIs by which you can customize the integration of e-mail and multimedia activities between Siebel and Genesys software.
- The Release Notes and Product Advisory for this product and associated products, are available on the Genesys Technical Support website at `http://genesyslab.com/support`.
- The *Genesys Technical Publications Glossary,* which ships on the Genesys Documentation Library CD. Provides a fairly comprehensive list of Genesys and CTI terminology and acronyms in this document.
- The *Genesys Migration Guide*, also on the Genesys Documentation Library CD, which contains a documented migration strategy for each software release. Please refer to the applicable portion or contact Genesys Technical Support for additional information.

Information on supported hardware and third-party software is available on the Genesys Technical Support website in the following documents:

- *Genesys Supported Operating Systems and Databases*
- *Genesys Supported Media Interfaces*

Genesys product documentation is available on the:

- Genesys Technical Support website at `http://genesyslab.com/support`.
- Genesys Documentation Library CD, which you can order by e-mail from Genesys Order Management at `orderman@genesyslab.com`.

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You can comment on what you regard as specific errors or omissions, and on the accuracy, organization, subject matter, or completeness of this document. Please limit your comments to the information in this document only and to the way in which the information is presented. Speak to Genesys Technical Support if you have suggestions about the product itself.

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Chapter

1 Introduction

This chapter introduces the G*plus* Adapter for Siebel CRM and discusses the following topics:

- New in This Release (7.5), page 13
- Integrated Solution Functionality, page 15

New in This Release (7.5)

In this 7.5 release of the G*plus* Adapter for Siebel CRM, several enhancements have been implemented.

Overall, the Adapter now supports Siebel 8.0, the latest CRM application suite offering from Oracle on the road to Fusion. The Siebel CRM Adapter 7.5 supports Siebel 8.0 on all components across multiple platforms.

As a part of the Genesys 7.5 release, this Adapter offers new features of Genesys 7.5, such as secured connections between Genesys servers and filter application logs for sensitive information. Genesys highly recommends learning about new Genesys 7.5 features from the relevant 7.5 release documentation.

In addition, please refer to the following new component-specific features:

G*plus* Communication Server for Siebel CRM

- Offers secured connection between the G*plus* Communication Driver and the G*plus* Communication Server.

G*plus* UCS Gateway for Siebel CRM

- Allows the option to start the G*plus* UCS Gateway using Windows services.

Genesys G7 Multimedia

- Chat Transfer
  - Transfer of chat interactions
  - User interface enhancement to support transferring of chat interactions
- Chat Spell Checking
  - Allows agents to perform spell checking on chat responses
- Chat Transcript Sort
  - Chat responses are displayed with the most recent on the bottom of the transcript.

G*plus* Media Routing

- Work Item Transfer
  - User interface enhancement to support transfer of Siebel work items to other agents or queues
- Pull of Work Item from Queue
  - Ability for the agent/supervisors to pull a work item from a queue while it is waiting to be routed
- Cancel or Stop Route Request
  - Ability for the agent/supervisors to cancel or stop a work item from being routed while it is waiting in queue
- Route Requests with G*plus* Communication Server
  - Now uses the Siebel HTTP subsystem to deliver route requests to the G*plus* Communication Server

Voice

- Automatic Network Reconnect
  - In two steps network transfer scenario where the second agent is not available to accept the call, the agent performing the transfer will automatically reconnect with the customer upon expiration of the time out period
- Multiple Active Outbound Campaigns
  - Supports Genesys Outbound ability to allow agent to be involved in multiple active call campaigns at the same time
- T-Server Connection
  - Supports new description of connection to the T-Server
  - Supports secure connection between the Adapter and T-Server
- Filtering of Sensitive Information
  - Supports filtering of sensitive information in UserData, Extensions, and Reasons when writing to application logs

Campaign Synchronization

- Added flexibility to the customization procedure of synchronization data:
  - Possibility to add custom fields with new data types: “float” and “datetime”
  - Possibility to export different field values per record in the same chain depending on the phone type (`contact_info_type`)
  - Possibility to synchronize custom fields from the Campaign List Contact view
  - Possibility to develop customer’s own synchronization procedure based on XML schema, which describes all messages supported by the Campaign Synchronization Component.

  For more information about the new functionality mentioned above, see the *G*plus *Adapter 7.5 for Siebel CRM Developer’s Guide*.
- The Campaign Synchronization Component now supports secure communication with Genesys servers.

Integrated Solution Functionality

The integrated Siebel CRM/Genesys 7 solution delivers the following functionality:

- Enterprise-wide routing over a multi-site, multi-switch contact center environment, connecting callers to the most knowledgeable agent, regardless of agent location, based on customer segmentation, business rules, or service level agreements:

  The Genesys Framework and G*plus* Adapter can support Siebel deployments on more switching platforms than any other CTI vendor.

  Genesys Framework supports multisite and global, multicarrier deployments.

  Genesys has out-of-the-box, validated CTI for major ACD, PBX and IVR products and major operating system platforms and databases.
- High scalability and high availability:

  Supports a high volume of concurrent Siebel CRM users.

  Supports back-up and fail-over servers on Windows, Solaris, and AIX.
- Integration with Siebel Call Center, made possible by the G*plus* Adapter for Siebel CRM:

  Provides a common baseline for reporting on interactions.

  Supports simultaneous interaction management by agents.
- Integration with Siebel eMarketing applications:

  Blended inbound and outbound contact management for efficient campaign management.

Proactive customer contact, such as notifications or new information, to improve customer satisfaction.

- Maximization of agent desktop:

  Intelligent queuing and routing of customer interactions across all media channels, multiple sites and switching platforms to a unified agent desktop, based on enterprise business rules.

  Single view of the customer across the enterprise with a complete interaction history within Siebel eBusiness applications.
- Ability to develop and manage the workforce in real time and ensure proper support levels.
- Enhanced customer intelligence and reporting with a single comprehensive view of all customer interactions collected in enterprise-wide eBusiness applications.
- Easy administration:

  Real-time synchronization of agent profile, and other configuration details between Genesys and Siebel Call Center, minimizes workforce scheduling conflicts by reducing inconsistencies in agent profiles and ensures every customer interaction is managed effectively, regardless of the time of day or customer demand.
- Integrated Joint Customer Support System:

  Siebel Systems and Genesys have implemented a joint support agreement that enables our technical support organizations to efficiently respond to customer Service Requests.

  All service requests are tracked by both organizations to ensure resolution and customer satisfaction.

  Ongoing solution support by Siebel Systems and Genesys that saves customers time and money as new releases are deployed.

Chapter

2 Overview

This chapter briefly explains how the G*plus* Adapter integrates Genesys and Siebel systems. It comments on, and explains the possible differences between different sites where the G*plus* Adapter is deployed. It then provides an introduction to each of the G*plus* Adapter components.

This chapter is divided into the following sections:

- Siebel and Genesys Computer Telephony Integration (CTI), page 17
- About Gplus Adapter Components, page 19
- The Communications (CTI) Toolbar and Controls, page 20
- Siebel Activities, page 21
- Voice Component Features, page 22
- Media Routing, page 26
- Multimedia Component, page 27
- Configuration Synchronization, page 30
- Campaign Synchronization, page 30

In summary, this chapter introduces the G*plus* Adapter, its context, its components, and its features. It emphasizes that you use the Genesys CTI controls embedded in the Siebel Communications toolbar to make use of the G*plus* Adapter features.

Siebel and Genesys Computer Telephony Integration (CTI)

The G*plus* Adapter serves as the intermediary between the Siebel system and the Genesys system, effectively providing a required data and control functions conversion between the Siebel servers and the Genesys servers. As a general rule, the Siebel client application communicates with the Siebel servers, and the G*plus* Adapter communicates with the Genesys Framework servers,

including the T-Server, but the G*plus* Adapter also enables information transfer between the two systems.

To perform the functions mentioned above, the G*plus* Adapter must be fully integrated into the Siebel Call Center application.

Installing the G*plu*s Adapter effectively modifies the Siebel Call Center user interface by adding specific CTI controls. Most of the G*plus* Adapter features and functionality are accessible through the controls that appear in a modified version of the Siebel Communications Toolbar, which is part of the Siebel Call Center application.

Be aware that your desktop may not include all of the CTI controls described in this document. The CTI controls that appears on your desktop reflect the particular selection of G*plus* Adapter components and features that are installed at your site and available on your desktop.

Note: It is possible to access G*plus* Adapter control functions other than through the Toolbar. You can use the Siebel Communication Commands menu (View > Communications) to navigate to some feature controls. You can also configure hot keys, assigning them to frequently used Communications Commands. Finally, you can right-click to obtain context-sensitive commands through local applet menus. However, the Toolbar provides the most obvious representation of the Adapter's CTI controls.

When the G*plus* Adapter is fully integrated into the Siebel Call Center, the resulting contact center functionality includes additional Genesys capabilities and services that extend and enhance the Siebel Call Center functionality.

About the Siebel Call Center

The Siebel Call Center provides comprehensive customer service, support, telesales, and telemarketing capabilities to a contact center organization. Using Siebel CRM Call Center, agents can quickly identify customers, enter and track service issues, access a knowledge base, run marketing campaigns, manage sales opportunities and even post solutions on the web, using a single desktop user interface.

The Siebel Call Center features a zero-footprint, highly interactive web client that requires no software installation and runs directly inside a web browser. The Siebel web client utilizes patent-pending technology to optimize the agent experience and provide high levels of interactivity including partial page refreshes, enabled keyboards, and support for push technology for inbound screen pops.

In addition, the Siebel Call Center includes global time-zone support to allow regionally distributed contact centers to leverage a "Follow the Sun" support model.

About G*plus* Adapter Components

Genesys CTI controls are embedded in the Siebel Communications toolbar, which is part of the Siebel Call Center application.

The G*plus* Adapter for Siebel CRM provides different toolbar buttons and controls depending on the selection of Genesys components and features that are deployed at a site. This is why the selection of buttons and controls available on your desktop may be slightly different than what you see illustrated in this document.

The rest of this chapter provides general information about the components and features that comprise the G*plus* Adapter.

Note: Chapter 3, "Agent Information," on page 37 provides specific information about using the controls and functionality associated with each component and feature. Information is listed under separate headings for each component.

The G*plus* Adapter for Siebel CRM includes the following components and related features:

- Voice Component, which provides basic voice (inbound and outbound voice) processing through Genesys Framework, and offers integration with other Genesys solutions to provide the following features:
  - Outbound Campaign feature (provides Outbound Contact and Campaign functionality)
  - Universal Callback (Voice and Web) feature
  - Expert Contact
- Media Routing Component (provides Siebel eMail functionality)
- Multimedia Component
  - Genesys E-mail feature (provides Genesys E-mail functionality)
  - Chat feature (provides access to chat functionality)
- Configuration Synchronization Component (provides the capability to transfer and synchronize certain elements of Siebel information, such as person/agent data, to the Genesys configuration environment.
- Campaign Synchronization Component (automates the synchronization of campaigns and associated contact lists)

An overview of each of the preceding topics is provided in this chapter.

The Communications (CTI) Toolbar and Controls

This section introduces the Communications CTI Toolbar and controls. As a rule, it is easier to learn what the various icons on your toolbar mean by using your mouse to position the cursor over them, one at a time. A moment after your cursor lands on a toolbar button icon or control, a small text box appears, explaining the purpose of that control.

In general, CTI toolbar buttons and controls can be divided into the following categories:

- Session control
- Basic interaction control
- Multimedia

Interactions control buttons with additional support for:

- Outbound Campaign
- Universal Callback
- Expert Contact

Siebel Toolbar Communication Commands

Siebel Communications Commands can be accessed in the following ways:

- The Communications toolbar with its dynamic reflection of work item states.
- Configurable hot keys, which you can assign to frequently used Communications commands.
- The right mouse button for context-sensitive commands in the local applet menu.
- The `View` > `Communications` menu on the main toolbar (see Figure 1).

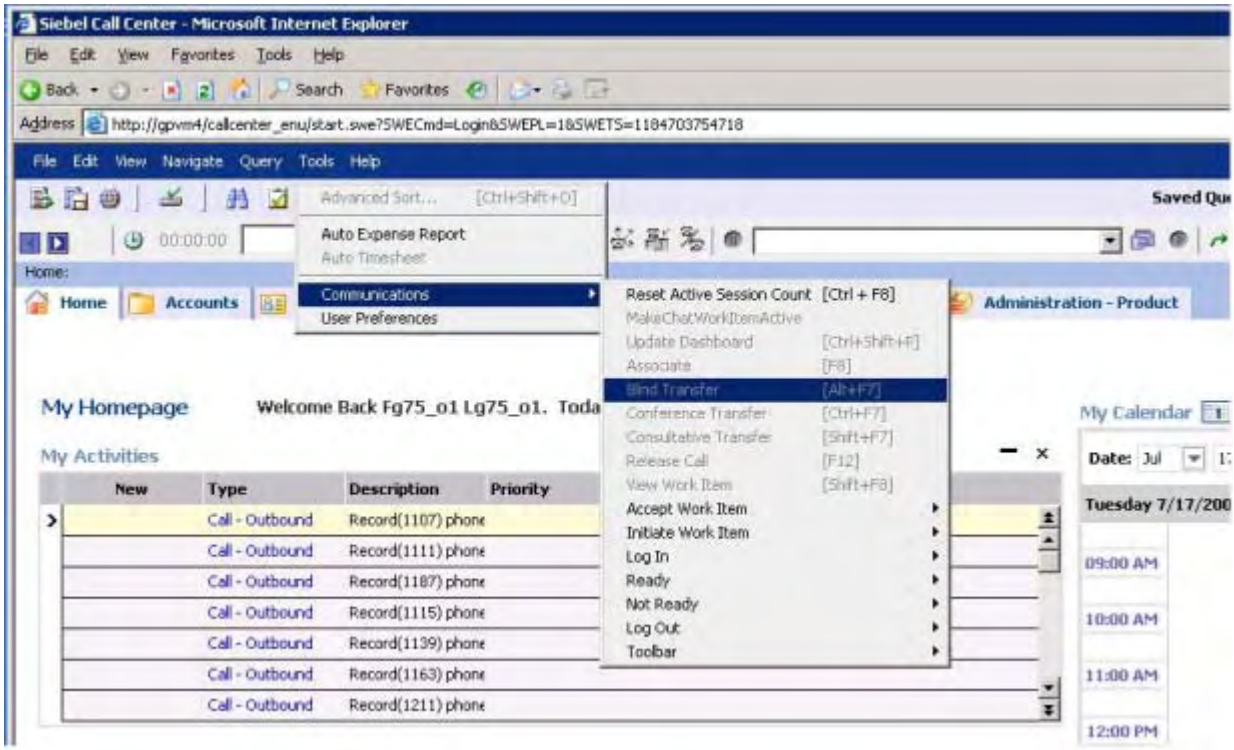

Figure 1: Communication Commands from the View Menu

Note: There are two View buttons: one is in the browser (grey, on the top) and second is in Siebel (blue, inside browser window). An agent clicks the Siebel View menu button.

Siebel Activities

Siebel Activities are created when a direct call is made from, or answered on, an agent's desktop; or when either a call or a preview interaction is delivered or originated by a supported Genesys solution such as Routing, Universal Callback, Outbound Contact, Genesys Chat, or Genesys E-mail. An Activity record is not created for internal calls. Activity records are updated dynamically based on an agent's action.

Voice Component Features

The Voice Component includes Basic Voice, Outbound Campaign, Universal Callback, and Expert Contact features. The Voice Component provides the following features:

- Basic Voice (voice calls originated or answered by a contact center agent)
- Outbound campaign (outbound campaign preview interactions and calls)
- Universal Callback (voice and web callback requests and calls automatically dialed by Universal Callback Server)
- Expert Contact.

Basic Voice Feature

The Basic Voice feature is intended for contact centers that primarily work with inbound calls.

Figure 2 shows the Siebel Call Center with the Adapter after the agent logs in, and before a call is received.

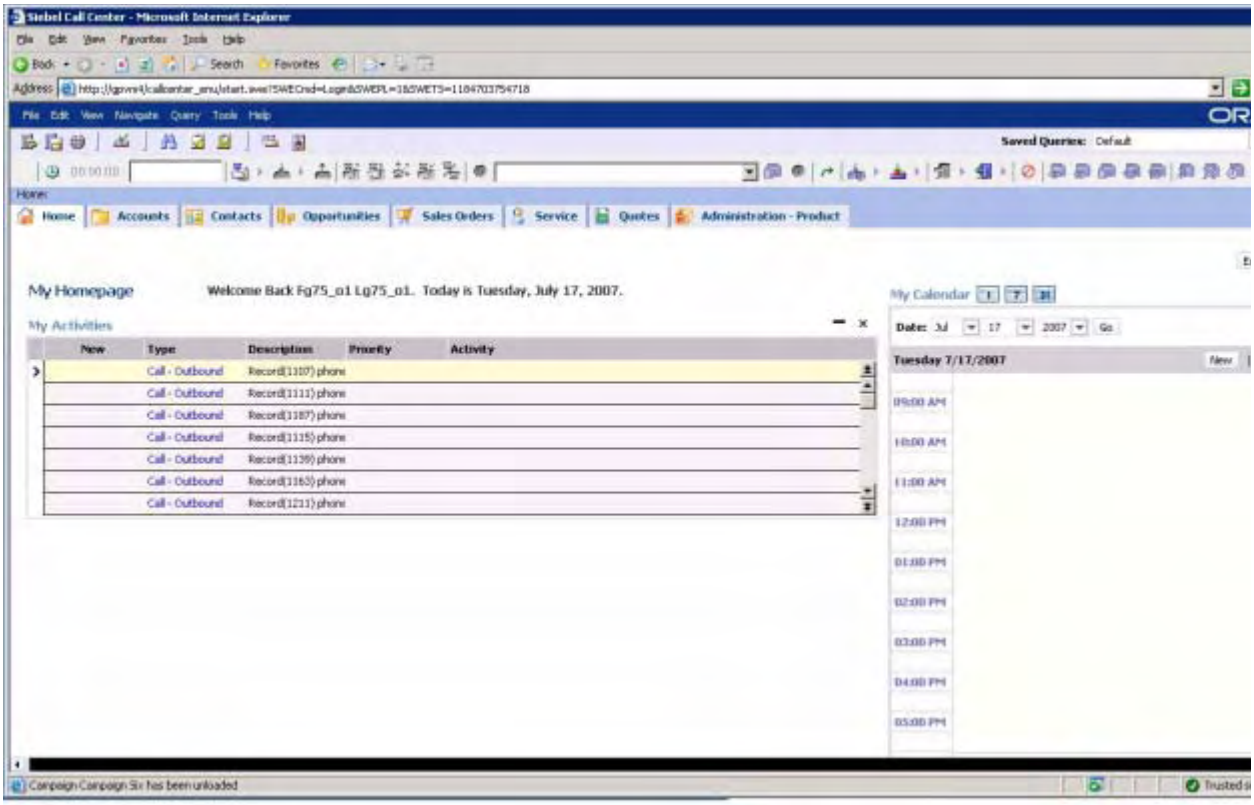

Figure 2: Siebel Call Center After Login but Before Call Received

When a call arrives, the phone rings, a screen pop appears, if configured, and the G*plus* icon blinks on the agent desktop (see Figure 3 on page 23).

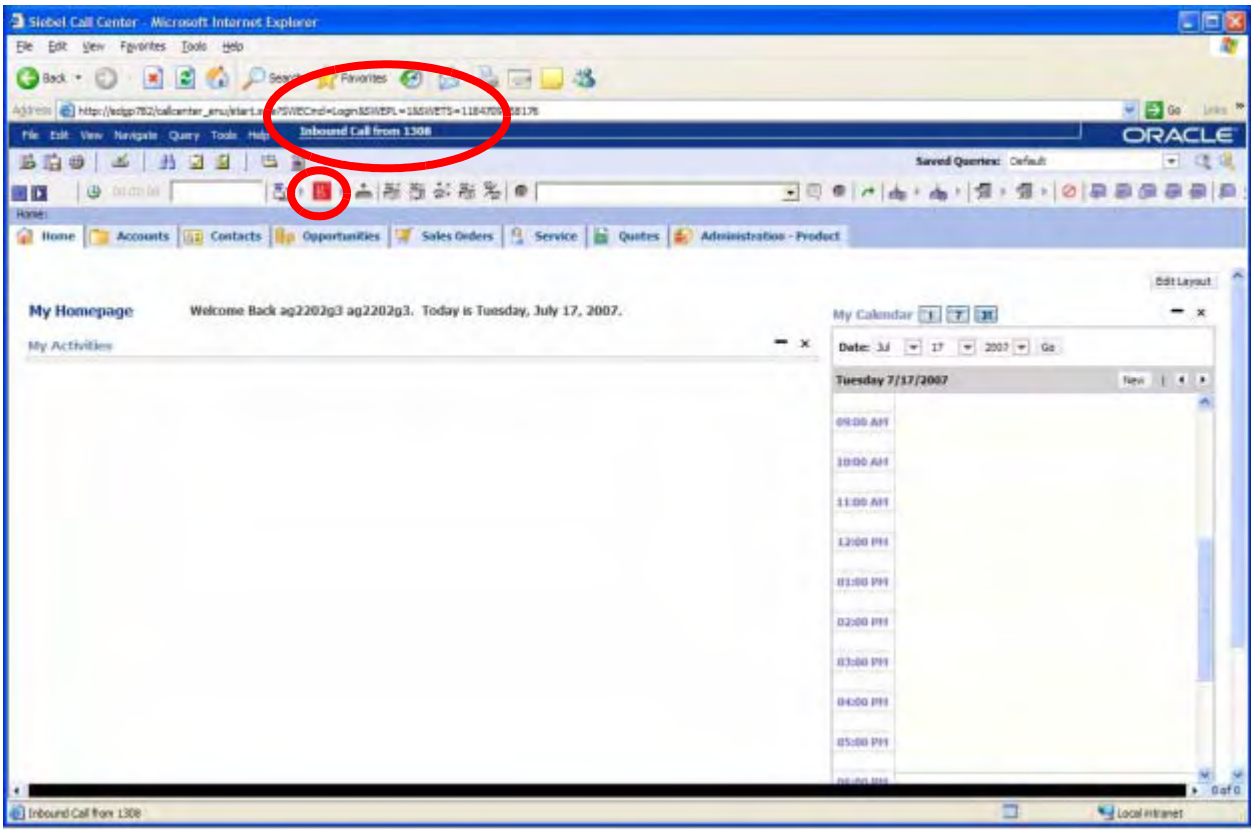

Figure 3: Siebel Call Center, Call Arrived

To answer the call, the agent clicks the blinking icon. This starts the interaction and enables the applicable embedded Genesys voice controls (see Figure 4 on page 24).

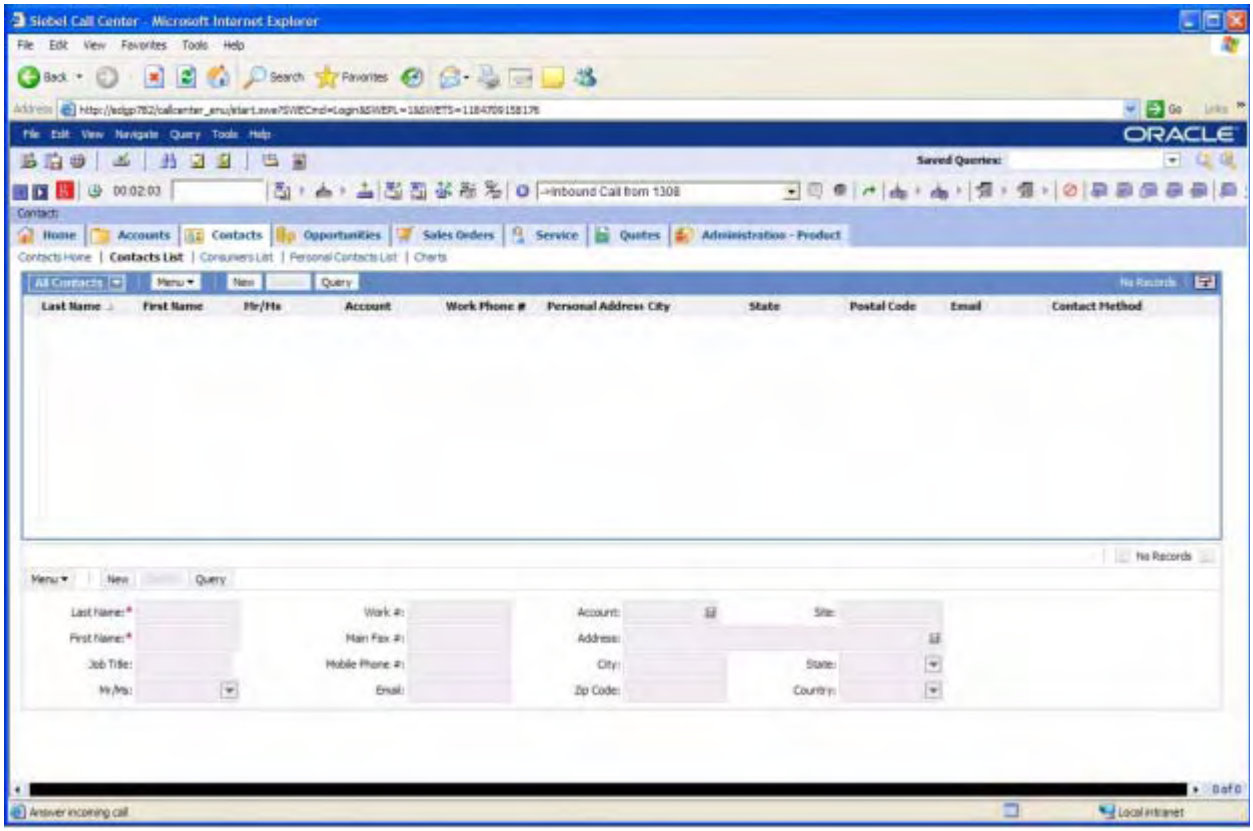

Figure 4: Siebel Call Center, Agent on Call

Outbound Campaign Feature

The Outbound Campaign feature is intended for contact centers that work with Outbound calls. It supports Genesys Outbound Desktop Protocol. The Outbound Campaign feature provides integration of Siebel CRM with the Genesys Outbound Contact 7 system. It functions within the context of the Voice Component and implements the Outbound Contact desktop functionality to facilitate outbound campaign activities.

Each incoming OCS interaction (for example, a Preview record or an outbound phone call) initiates a Campaign Overview screen pop in the Siebel desktop application.

Additionally, Campaign status information is displayed on the Persistent Customer Dashboard.

An extension of the current G*plus* Voice Component enables agents to process outbound calls from OCS.

Universal Callback Feature

The Universal Callback feature is used with the Voice Component to provide Voice and Web Callback functionality. It allows a customer to schedule a call from an agent, and allows the agent or an IVR to help.

For example, with the Universal Callback feature available, a customer speaking with an agent can request that a representative from your company call back at another time. The customer can confirm a phone number and suggest an approximate callback time, and the agent can schedule the call.

Later, at or near the scheduled callback time, the callback information is presented to an agent. Depending on the type of callback supported at your site and the details of the callback request, the Universal Callback system may suggest that a specific agent make the call, or assign the callback task to some group of agents. In the latter case, various options may be available for determining which particular agent processes the callback.

Please refer to the Universal Callback documentation for full details about the capabilities of this feature.

Expert Contact Feature

The Expert Contact feature provides integrated access to functionality of the Genesys Expert Contact solution. In doing so, this feature offers basic CTI functionality to branch office workers, the “experts,” who may not have access to traditional PBX/CTI link environment. in this context, an expert is anyone in an enterprise who can provide a contact (such as a customer, partner, or vendor) with the right level of expertise on a given product, service or process.

An expert does not use Genesys software the same way a traditional contact center agent does. The expert’s location is also an important criteria. An expert can be located anywhere within the extended enterprise, such as back-office, branch office, or even home office. As a consequence, “high end” CTI/telecommunications infrastructure may not be available to the expert. The service provided by the Expert Contact CTI-Less T-Server fulfills the need.

The Genesys Expert Contact solution can also apply intelligence to the routing and transfer of contact interactions. Interactions are routed according to a company's business criteria to the resource best qualified to handle the customer, regardless of location. Depending upon the implementation, call and data transfer capabilities may enable agents to transfer current caller context data (such as the data collected through an IVR) along with the call to the expert anywhere in the enterprise.

The Expert Contact feature, by providing access to the related Genesys Expert Contact Solution, addresses an organization’s needs for enterprise-wide integrated customer care. I

The CTI-less T-Server delivers a crucial part of the Expert Contact functionality. It monitors the expert contact desktop application without any connection to a premise switch. It receives and tracks CTI (link emulation)

messages from the expert desktop. It performs many of the same tasks as other (switch based) T-Servers in that it can:

- Send messages to, or receive messages from, other Genesys server components (such as Stat Server)
- Handle data for current interactions
- Coordinates voice and data delivery to the expert's desktop.

Media Routing

The G*plus* Adapter for Siebel CRM enables you to use Genesys E-mail, Siebel eMail, or both. For information about Genesys E-mail, refer to the e-mail information listed under the "Multimedia Component" section. The following sequence shows the processing of Siebel eMail:

1. The Genesys Universal Router queues inbound Siebel eMails:
   - E-mails are received from the corporate e-mail server and processed via Siebel eMail Response workflows.
   - E-mails are passed to Siebel Smart Answer for context analysis and auto response, if appropriate; otherwise e-mail is passed to Genesys for routing.
   - The Genesys Universal Router Business Service attaches the Siebel eMail activity ID and other key data to a component that issues a route request to Genesys Universal Queue.
2. The Genesys Universal Routing Server (URS) pushes the e-mails to Siebel agents via the Siebel Communications Toolbar's e-mail channel.
   - Routing strategies in URS identify a target agent.
   - Interaction Server sends an invitation event to an agent.
   - Siebel delivers the e-mail. The interaction is pushed to the agent via the G*plus* Adapter.
   - The Siebel Communications toolbar notifies the selected agent that an e-mail has arrived with a flashing icon. See Figure 5.

Figure 5: Incoming E-mail Icon

3. Siebel eMail Response processes the e-mail.
   - Siebel event handlers use the passed activity ID to look up and pop the appropriate Siebel eMail view for processing the agent's reply processing.
   - Siebel outbound workflow processes send the reply out to the corporate e-mail server when the agent is done.

4. The G*plus* Adapter for Siebel CRM updates the interaction status in the Genesys environment.

Note: Genesys recommends that you do not sign into two different computers at the same time using the same sign-in password. You should work on and sign into only one computer at a time.

Multimedia Component

The Multimedia component is a driver that provides Genesys E-mail and chat capabilities, switches control among work items, accepts incoming interactions, and controls related elements of the user interface.

This Multimedia Component section provides information under the following headings:

- Genesys E-Mail
- Genesys Chat

Genesys E-Mail

This section explains how the Adapter handles and processes Genesys E-mail in the Siebel Call Center. It introduces the desktop controls for processing e-mail that is handled by the Genesys Multimedia Solution.

Desktop Controls for Processing Genesys E-Mails

The G*plus* Adapter for Siebel CRM enables agents to process e-mails from Genesys Multimedia. The e-mail view provided by the Adapter includes e-mail specific controls. Figure 6 on page 28 shows the desktop of an agent working on a reply.

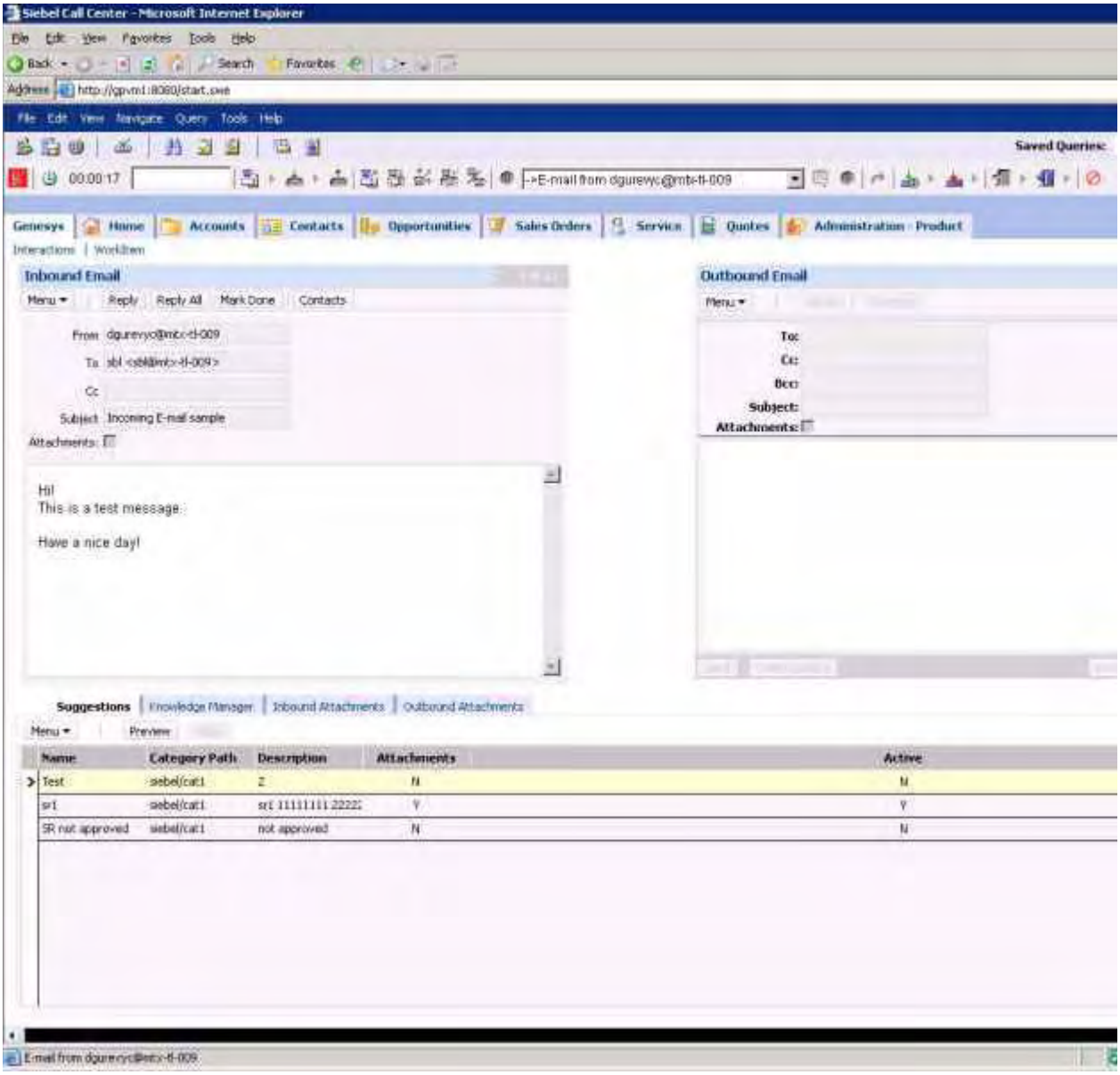

Figure 6: Siebel Call Center for Inbound E-Mail

The desktop interface, shown in Figure 6, uses the following Genesys controls and features:

- Inbound e-mail interaction controls (Reply, ReplyAll, Mark Done [delete]), and toolbar buttons Transfer to Agent, and Transfer to Queue).
- Outbound (reply) e-mail interaction controls (Send, Save&Close, Transfer to Agent, Transfer to Queue, and Delete)
- Knowledge Manager, providing the ability to browse, preview, and apply standard responses from the Genesys Standard Response Library (SRL)

- Suggestions tab, providing the ability to view automatically suggested standard responses and insert them into the reply
- Inbound Attachments view, providing the ability to view attachments of inbound e-mail
- Outbound Attachments view, providing the ability to view and add new attachments to the outbound (reply) e-mail

Genesys Chat

The G*plus* Adapter 7.5 for Siebel CRM enables agents to process Genesys Multimedia Routing Solution chats. The agent can use the Genesys Standard Response Library to enter chat responses. Figure 7 shows the agent's desktop view of a chat interaction.

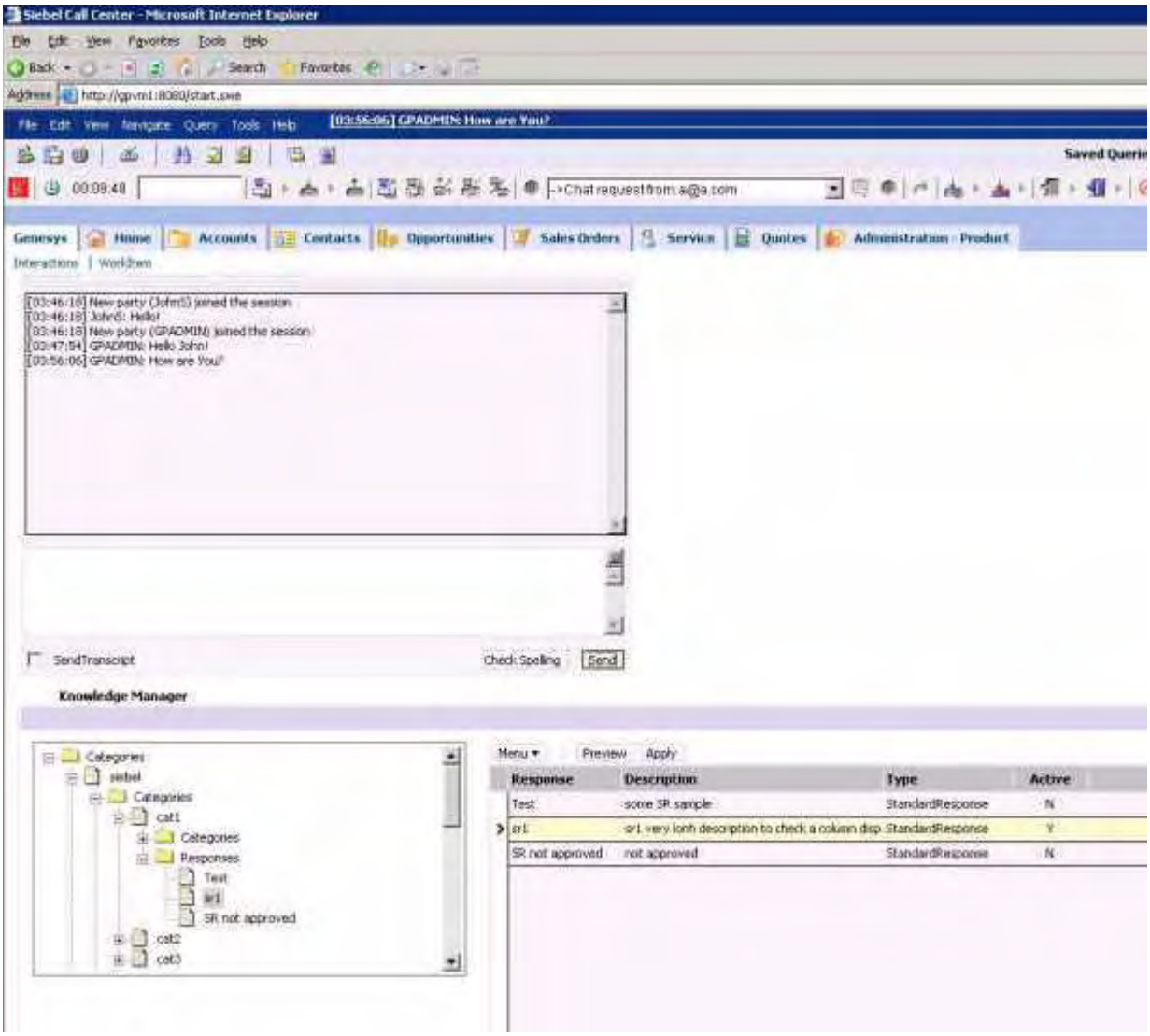

Figure 7: Agent's Chat Screen

Configuration Synchronization

G*plus* Adapter for Siebel CRM enables Siebel configuration changes to be dynamically communicated to Genesys via "listener" services in real time. The specific changes are automatically updated in the Genesys Configuration Layer when detected. Figure 8 shows a diagram of the process.

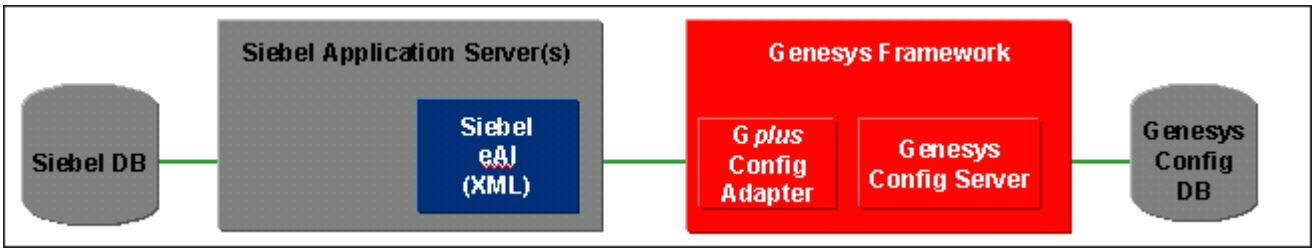

Figure 8: Configuration Synchronization

The configuration information is abstracted from physical data structures. There is no direct database call into Siebel or Genesys.

The design philosophy used for this feature is consistent with the following established data access and update methods:

- Siebel EAI
- Genesys Configuration Management APIs

Note: Currently the synchronization is unidirectional, occurring from the Siebel to the Genesys environment.

For more information about the Siebel interface for updating agent and other configuration data, see Chapter 4, "Administrator's Information," on page 81.

Campaign Synchronization

The Campaign Synchronization Component of the G*plus* Adapter for Siebel CRM provides Siebel users with the ability to export campaigns and campaign-related data from the Siebel to the Genesys environment. For each exported campaign, the component automatically creates a campaign definition in the Genesys Configuration Layer, including Campaign, Calling List, and Table Access objects. In addition, the component creates database tables with calling list records and indexes. The exported information becomes readily available for Genesys Outbound Contact.

When a campaign is exported, the Campaign Synchronization Component automatically copies changes that were made to that campaign in the Siebel environment to the Genesys environment.

Beginning with the 7.2 Release, the component also sends back to Siebel all call results of campaign execution (backward synchronization). In previous releases there was no such functionality.

Note: If you export a campaign from Siebel to Genesys and then change its name in the Siebel Call Center, the name of the campaign is not updated in Genesys. In this scenario, use the following workaround: Before changing the name of an exported campaign, delete the Genesys Campaign Export position from the campaign in Siebel. Next, change the campaign name and export the campaign to the Genesys environment by adding the Genesys Campaign Export position to the campaign. Then, manually remove in Genesys Configuration Manager all the objects corresponding to the old campaign name, which are the old campaign object, old calling list object(s), and old table access object(s).

Note: In Siebel 7.7/7.8/8.0, when the campaign execution option Load Behavior is set to `Add to Existing Wave`, the component does not support the deletion of a list from a campaign. The component deletes the list and all its contacts from the campaign on the Genesys side, while the contacts of the list still remain in the campaign on the Siebel side.

Features

The Campaign Synchronization component provides the following primary features which are described in upcoming sections:

- Real-time Campaign data synchronization from Siebel to Genesys
- Call results synchronization from Genesys to Siebel in Command and Real-Time modes
- Configuration Manager folder assignment based on Siebel User IDs
- Database Access Point assignment based on Siebel User IDs
- Campaign-mapping mode support for Regular and Compatibility modes
- Open synchronization interface
- Configurable list import
- Warm Standby mode support for Genesys Configuration Server
- Warm Standby mode support for Genesys DB Server
- Update of Genesys `Do Not Call` field based on either Customer ID or phone numbers
- Warm Standby mode support

Real-Time Campaign Data Synchronization

The real-time data synchronization feature of the Campaign Synchronization Component automatically updates information between Siebel and Genesys applications as changes to campaigns are made in the Siebel environment. The Campaign Synchronization Component supports this feature by default.

Call Results Synchronization

Call results synchronization is possible in two modes:

- Real-time
- Command

Real-Time Mode

In Real-time mode the Adapter dynamically collects the results of campaign execution from the Outbound Contact Server and sends them as XML messages to Siebel with a time interval which equals the number of milliseconds from the application option `pushDataTimeout`. To enable call results synchronization in Real-time mode, the application option `synchCallResults` must be set to `true`.

Command Mode

In Command mode the Adapter executes a synchronization procedure just one time for all Siebel campaigns which had been exported to Genesys before this procedure began. The Adapter queries the Outbound Contact Server database for Call Results, which belong to such campaigns, and sends these results back to Siebel (an XML message for each campaign) until all campaigns have been processed. This mode may be helpful for obtaining Call Results from campaigns which were previously exported to Genesys but were not synchronized for Call Results in Real-time mode when these campaigns were executed. To start the Adapter in Command mode you must add the new option `-batch` in the Adapter's command line.

Configuration Manager Folder Assignment Based on Mapped Siebel User IDs

During import of a campaign, Configuration Manager objects of different types related to that campaign are created under Configuration Manager folders according to folder assignments. To achieve this, the Campaign Synchronization Component supports the mapping of Siebel User IDs to Genesys Configuration Manager folders. For more information about the mapping, see the *G*plus *Adapter 7.5 for Siebel CRM Deployment Guide.*

Note: To synchronize campaign information using this release of the G*plus* Adapter, you must map the Siebel User IDs (the Login Names) of the *users who created campaigns* in the Siebel environment to the DatabaseAccessPoints, TableAccessFolders, CallingListFolders, and CampaignFolders.

Database Access Point Assignment Based on Siebel User IDs

The Campaign Synchronization Component enables Siebel users to create calling list tables in different databases. This is achieved through the mapping of Siebel User IDs to Database Access Points in the Genesys Configuration Layer. For more information about the mapping, see the *G*plus *Adapter 7.5 for Siebel CRM Deployment Guide.*

Note: To synchronize campaign information using this release of the G*plus* Adapter, you must map the Siebel User IDs (the Login Names) of the *users who created campaigns* in the Siebel environment to the DatabaseAccessPoints, TableAccessFolders, CallingListFolders, and CampaignFolders.

Regular and Compatibility Campaign Mapping Mode Support

The Campaign Synchronization Component supports both Regular Mode and Compatibility Mode.

Regular Mode

For any exported Siebel campaign, the Component creates a corresponding Genesys campaign. If the Siebel campaign has Siebel call lists, corresponding Genesys calling lists are associated with the created Genesys campaign.

Compatibility Mode

For any exported Siebel campaign tree (the top-level Siebel Parent campaign and all its Child campaigns), the Component creates a single Genesys campaign corresponding to the top-level Siebel Parent campaign. All Genesys calling lists created based on Siebel call lists from the top-level Siebel Parent campaign and all its Child campaigns are associated with the created Genesys campaign.

Open Synchronization Interface

The Campaign Synchronization Component exposes its campaign synchronization interface through a Siebel Business Service and XML schema.

The Business Service provides a number of methods to invoke different synchronization functions. Using this interface, you can customize the default campaign-synchronization scenarios provided by the Campaign Synchronization Component or new scenarios can be implemented.

Advanced customers may develop their own synchronization procedure based on XML schema, which describes all messages supported by the Campaign Synchronization Component.

For more information about the open synchronization interface, refer to the *G*plus *Adapter 7.5 for Siebel CRM Developer's Guide*.

Configurable List Import

You can change the way in which the Campaign Synchronization Component maps Siebel fields to Genesys fields when importing calling list records to the Genesys environment changes by configuring List Import functionality of the Campaign Synchronization Component.

For more information about the Configurable List Import, see the *G*plus *Adapter 7.5 for Siebel CRM Developer's Guide.*

Genesys Configuration Server Warm Standby Mode Support

If the Campaign Synchronization Component loses communication with the primary Configuration Server, it tries to connect to the backup Configuration Server. If successful, the Component continues to work with the backup Configuration Server as if it were the primary Configuration Server.

If the component cannot establish communication with the backup Configuration Server (for example, if the backup Configuration Server is not configured or running, or for other reasons), then the Component tries to attempt to reestablish a connection to the primary. Essentially, the Component tries to connect to each server alternately until either connection is established.

The system administrator can configure options for the Configuration Server Warm Standby mode by modifying the `Server Info` > `Backup Server` and `Server Info` > `Reconnect Timeout` properties of the Configuration Server Application object in the Genesys Configuration Layer.

Genesys DB Server Warm Standby Mode Support

If the Campaign Synchronization Component cannot connect to the primary DB Server, it tries to connect to the backup DB Server. If successful, the

Component continues to work with the backup DB Server as if it were the primary DB Server.

If the Component cannot establish communication with the backup DB Server (for example, if the backup DB Server is not properly configured or not running or for other reasons), then the Component tries to establish a connection to the primary DB Server. Essentially, the Component does this by trying to connect to each server alternately until either connection is established.

The system administrator can configure options for the DB Server Warm Standby mode by modifying the `Server Info` > `Backup Server` and `Server Info` > `Reconnect Timeout` properties of the DB Server Application object in the Genesys Configuration Layer.

Update of Genesys Do Not Call Field Based on Either Customer ID or Phone Numbers

The Campaign Synchronization Component can be configured to update the Genesys `Do Not Call` list with either Customer IDs or phone numbers of Siebel Contacts or Prospects marked as `Do Not Call`. For details see the *G*plus *Adapter 7.5 for Siebel CRM Deployment Guide*.

Warm Standby Mode Support

The Campaign Synchronization Component can be configured to support a Backup Server in Warm Standby mode.

For details see the *G*plus *Adapter 7.5 for Siebel CRM Deployment Guide*.

Chapter

3 Agent Information

This chapter provides step-by-step instructions for agents who work with the G*plus* Adapter for Siebel CRM.

This chapter covers the following topics:

- Logging Into the Siebel Server, page 38
- Making Yourself Ready or Not Ready, page 39
- The Voice Component, page 42
- Multimedia Component, page 58
- Media Routing Component, page 75
- Logging Out, page 78

The section titled "The Communications (CTI) Toolbar and Controls" on page 20 of Chapter 2 provides general information about buttons and controls used to perform the steps in this chapter.

As an agent, you will be working with features associated with one or more of the following G*plus* Adapter for Siebel CRM components:

- Voice Component – Incoming/outgoing phone calls, Outbound campaigns, Universal (Voice and Web) callback, Expert Contact
- Media Routing Component – Siebel eMail processing
- G*plus* Multimedia Component – Chat, Co-Browse, and Genesys E-mail

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Note: Many variations are possible in phone and CTI technology, and in the site-specific installations of the Genesys and Siebel products. For this reason, the procedures that you should follow at your site may be different from those presented in this document. The procedures provided here are merely examples. Your organization's System Administrators and Supervisors may define different procedures for you to use.

Logging Into the Siebel Server

Agents typically log in to all of the media defined as standard for their configuration profile.

To start, you must log into the Siebel Server:

1. Enter the following information in the Siebel Login window:
   - your User Name
   - your Password
2. Click `OK`.

Note: If an agent is in the Siebel configuration which is associated with the Adapter, then the agent will also log into the Queue specified by the configuration (ACD group).

The next step is to make yourself Ready.

Note: Genesys recommends that you do not sign into two different computers at the same time using the same sign in password.

Figure 9 shows the screen you see when you log into the Voice Component.

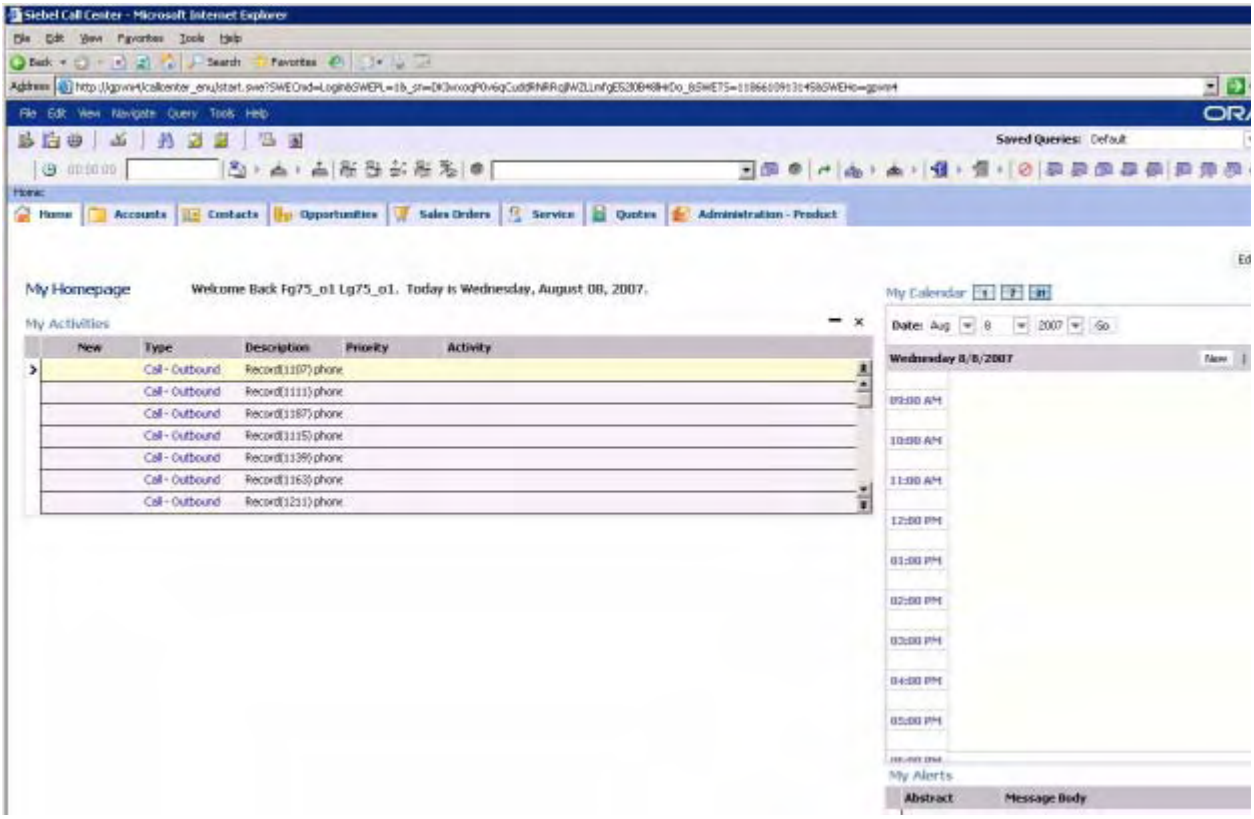

Figure 9: Agent's View of the Siebel Call Center

Notification of Interactions

An interaction occurs when a real person communicates with another real person, or with some message representing a person. A phone conversation between two people is an interaction, and so is a session between a person and an IVR system that asks the person for her social security number. Receiving an e-mail is an interaction.

A screen pop or a blinking icon provides a notification, which is how the desktop tells you that a (potential) new incoming interaction is ready for your attention. The screen pop may identify the type of interaction as, for example, an e-mail, or chat.

You are notified about all incoming interactions on `EventRinging` (Voice) or `OpenMediaInvited` (Genesys E-Mail, Chat, Siebel eMail, and other open media items). You receive notifications in Predictive and Progressive dialing modes.

Before you can start receiving notifications, you must make yourself Ready, as described in the next section.

Making Yourself Ready or Not Ready

After you log in, you must make yourself Ready to use some or all types of media before you can start accepting interactions. Depending on your work at the Contact Center, you may want to select particular types of interactions to be ready for, or select types not to be ready for.

The information in this section is provided under the following headings:

- Make Ready/Not Ready Controls, page 39
- Making Yourself Ready to Use Media, page 40
- Making Yourself Not Ready, page 41

Make Ready/Not Ready Controls

The Toolbar includes the all-inclusive Make Ready button, and also a set of ready buttons for each different type of media.

The easiest approach is to select the Ready button to make yourself Ready. See Figure 12. Click this button to make yourself Ready to all types of media defined by the Agent profiles for the particular Siebel configuration.

Figure 10: Ready Button

For a more specific approach, use the media type buttons. From left to right the buttons in the Figure 11 represent voice, Genesys E-mail, Chat, and Siebel eMail.

Figure 11: Media Type Buttons

There are other Media Type group buttons. By positioning your cursor over an "arrow" next to the group button, you can expand it to reveal its sub-buttons. Table 1 lists the different Media Type buttons, and emphasizes the relationship between the group buttons and their sub-buttons.

Table 1: Buttons by Media Type

Group Button	Corresponding Sub-Buttons			
Login to All Channels	Login to Voice	Login to Multimedia		
Logout from All Channels	Logout from Voice	Logout from Multimedia		
Ready for All Channels	Ready for Voice Calls	Ready for E-mail	Ready for Chat	Ready for Siebel eMail
Accept incoming work item	Answer Call	Answer Incoming Interaction		
Initiate work item	Make Call	Send E-mail		Send Siebel eMail

Making Yourself Ready to Use Media

Select the Ready button to make yourself Ready. See Figure 12.
The interaction dialog box displays.

Figure 12: Ready Button

To make yourself Ready:

1. Select what you want to be ready for, as follows:
   - Click the Ready button (see Figure 12 on page 40). The Ready button makes you `Ready for all channels.`

     Or

- In the Media Type buttons expansion with sub-buttons, you can select a specific media type to make yourself Ready for that media type. For example, in Figure 13, the `Set ready for Email` is selected.

Figure 13: Set Ready Interaction Types

Note: The interaction types in grey are not available to you. If you are supposed to be available for an interaction type that displays as grey, see your system administrator.

The available interaction types are as follows:

- Phone (includes Universal Callback)
- Genesys E-mail
- Genesys Chat
- Co-browse

Now you are ready to accept interactions. If you are working with more than one type of media, selecting the Ready button will make you Ready for all media types assigned to you.

Making Yourself Not Ready

To make yourself Not Ready:

1. *For all media channels*, click the Not Ready button, (see Figure 14 on page 41).
   A dialog box opens (see Figure 15 on page 42) in which you can enter a reason for your Not Ready status *for all media channels*.
2. In the Media Type buttons expansion with sub-buttons for the `NotReady` state, you can select a specific media type to set to the `NotReady` state for the particular media type.

Figure 14: Not Ready Button

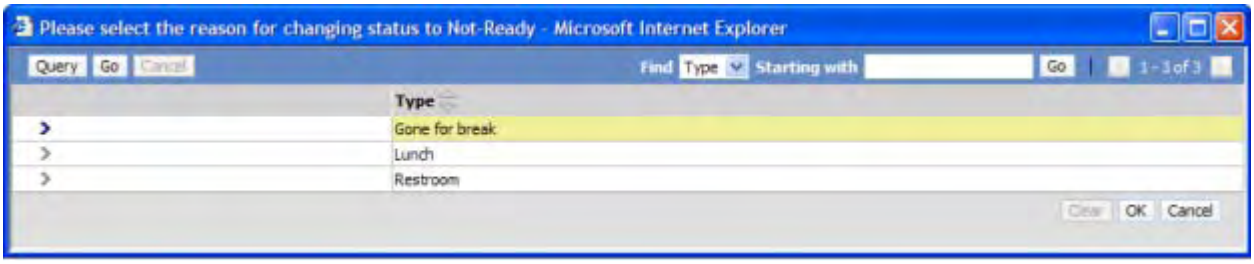

Figure 15: Reason Code for Changing Status to Not Ready

Note: For information about Not Ready reason codes, see Siebel documentation.

The Voice Component

When you work with inbound or outbound phone calls you are using the Voice Component. The voice component includes several features:

- Basic Voice
- Outbound Campaign
- Universal Callback
- Expert Contact

Step-by-step instructions for working with each of these features are provided below.

Not all desktops have all features. Your desktop may have some or all of the buttons and controls mentioned in this section. If a feature is not installed, then your desktop will not have the controls needed to use the feature or the control will be disabled (grayed) and you will not be able to perform the procedures associated with that feature. Your System Administrator or Supervisor can identify the components and features that you have.

After you sign in and log on to the Voice Component you will see the screen shown in Figure 9 on page 38. This image shows the Siebel Call Center with the Adapter after you log in, but before a call is received.

The Basic Voice Feature

When you work with inbound or outbound phone calls you are using the Basic Voice feature. Additional features may also be involved. (For example, outbound calls that involve campaign information or controls may involve the Outbound Campaign feature as well.) The Basic Voice feature provides the commonly used telephone functions, while other Voice Component features

provide more advanced options. The Basic Voice feature supports the following procedures:

- Basic Voice Controls
- Answering an Incoming Phone Call
- Making a Call
- Putting a Call on Hold
- Retrieving a Call Put on Hold
- Transferring a Call
- Adding a Conference
- Setting Forward
- Cancelling Forward
- Hanging Up

Each of these procedures is described below. All of these procedures assume that you are in the Ready state. See “Making Yourself Ready or Not Ready” on page 39 for details.

Basic Voice Controls

Basic Voice controls are standard Siebel Call center buttons and are supplied as a part of standard installation. See the Siebel Call Center Administration Guide and User Guide for detailed information. The Communication Toolbar provides the following Basic Voice buttons, which function as described:

 `Make call:` Initiates new interaction, voice call, e-mail, or other supported media type.

 `Answer call:` Answers incoming interaction request.

 `Hold:` Puts work item on hold.

 `Resume:` Resumes work item (for example, a work item put on hold).

 `Hang up:` Hangs up work item.

 `Conference:` Makes a consult call to establish a conference.

 `One step mute transfer:` Initiates mute (or blind) transfer.

 `Two step consultative transfer:` Initiates a consult call to start a consultative transfer.

 `Set Forward / Cancel Forward:` Sets or cancels a call forwarding request.

Answering an Incoming Phone Call

To answer an incoming phone call:

1. Click the blinking phone icon. This starts the interaction and enables the applicable embedded Genesys voice controls.

   In the Work Item window, the caller's name and information displays and you hear the customer on the line.

2. Once you accept a phone call, you can do one of the following:
   a. Transfer the call or initiate a conference (see also the section below, "About Transfer and Conference Calls")
   b. Put the call on Hold
   c. End the Call
3. To end the call, save any customer information and click the `Hang up` button.

You will be made available to take a new call.

Making a Call

To make a call:

- Enter the DN and click the `Make Call` button.

Putting a Call on Hold and Retrieving it from Hold

To put a call on hold:

- Click the `Hold` button.

To retrieve a call from hold:

- Click the `Resume` button.

About Transfer and Conference Calls

On the Siebel CRM Communications Toolbar, there is one button for toggling between TransferInit and TransferComplete, and another button for toggling between ConferenceInit and ConferenceComplete. In both cases, a single button is mapped to two device commands, and that button allows you to select one device command or the other, but not both at the same time.

Transferring a Call

You can perform two types of call transfers, as explained below:

- One-step ("mute" or "blind") transfers, in which you enter or select the number to which the call should be transferred, and then click the button "Blind transfer to ...".

- Two-step transfers, in which you connect the first caller to another party (as in a consultative call) and then disconnect yourself.

Details about these two types of transfers are provided below.

One-Step Transfers

For a one-step transfer:

- Enter or select the number to which the call should be transferred, and then click the button `Blind transfer to`.

Two-Step Transfers

For a two-step transfer:

1. Click the `Consultative Transfer to` button.
2. After the initial interaction has been established, and after a Consult call has been established and the initial conversation with the other consulting party is over, click the `Complete transfer` button or the `Hang up` button.

Conferencing

To initiate a two-step conference:

1. Click the `Conference Transfer to` button.
2. After the initial interaction has been established, and after a Consult call has been established and the initial conversation with the other consulting party is over, click the `Complete conference` button.

Hanging Up

To disconnect from the work item:

- Click the `Hang up` button.

Set Forward / Cancel Forward

To forward a call:

- Enter the forwarding extension and click the `Set Forward` button. Calls will be forwarded to this DN.

To cancel forwarding of a call:

- Enter the forwarding extension and click the `Cancel Forward` button. Calls will be received on the agent's DN.

The Outbound Campaign Feature

The Outbound Campaign feature is meant for Call Centers with a large volume of outbound traffic.

To make a simple outbound call, like the call you can make from any phone, use the procedure described in the section titled “Making a Call” on page 44.

When making calls associated with an outbound campaign, the G*plus* Adapter’s Outbound Campaign feature provides you with additional options, as described under the following headings:

- Outbound Campaign Controls
- Working with an Outbound Call in Progressive or Predictive Dialing Mode
- Working with an Outbound Call in ASM Mode
- Working with an Outbound Call in Preview Dialing Mode
- Accepting and Rejecting Preview Interaction Requests

Note: These Outbound Campaign options use a particular set of Communications Toolbar buttons and controls that transmit commands to the Genesys Outbound Contact Server (OCS). The OCS assists you in processing outbound campaign calls.

Note: Genesys does not recommend one step (mute or blind) transfers working with outbound OCS calls, because if the agent on the receiving side works with customer records, then the record for the one step transferred call will be stored in the Genesys OCS database with the status of a Current Call and will be marked as Processed, and the transferred record will became a new active record.

About the Dialing Modes Available When Using This Feature

The Outbound Campaign feature provides three different dialing modes: Preview, Predictive, and Progressive.

In Preview mode, an agent previews the calling list record on a Preview screen and manually selects the outbound call to be dialed.

The Progressive and Predictive modes are different, and utilize OCS automatic dialing capabilities.

In Progressive mode, a call is placed when an agent is available, that is, after the agent’s status changes to Ready.

In Predictive mode, the automatic dialer tries to predict agent availability and places calls in advance based on calculations that predict agent availability.

To minimize the number of lost predictive calls during a mass log-out (such as occurs at the end of a shift, or equivalent), a Controlled Logout option is available. It enables the G*plus* Adapter to obtain from OCS an estimated time

until Logout. When this time expires, the Adapter automatically executes the Logout process, enabling the Predictive algorithm to complete dialing in-advance calls until the appropriate time. The Controlled Logout option enforces constraints that prevent an agent from logging out until a certain time. The details are explained below, under the heading “Controlled Logout Option” on page 48.

Purpose

The Preview dialing mode is recommended for low-volume, high-value campaigns (see sample in Figure 16 on page 48).

Predictive dialing mode automatically dials calls from a calling list and predicts agent availability. It is recommended for high-volume, low-value campaigns.

Progressive dialing mode automatically dials calls from a calling list only when an agent is available. It is recommended for high-volume, high-value campaigns.

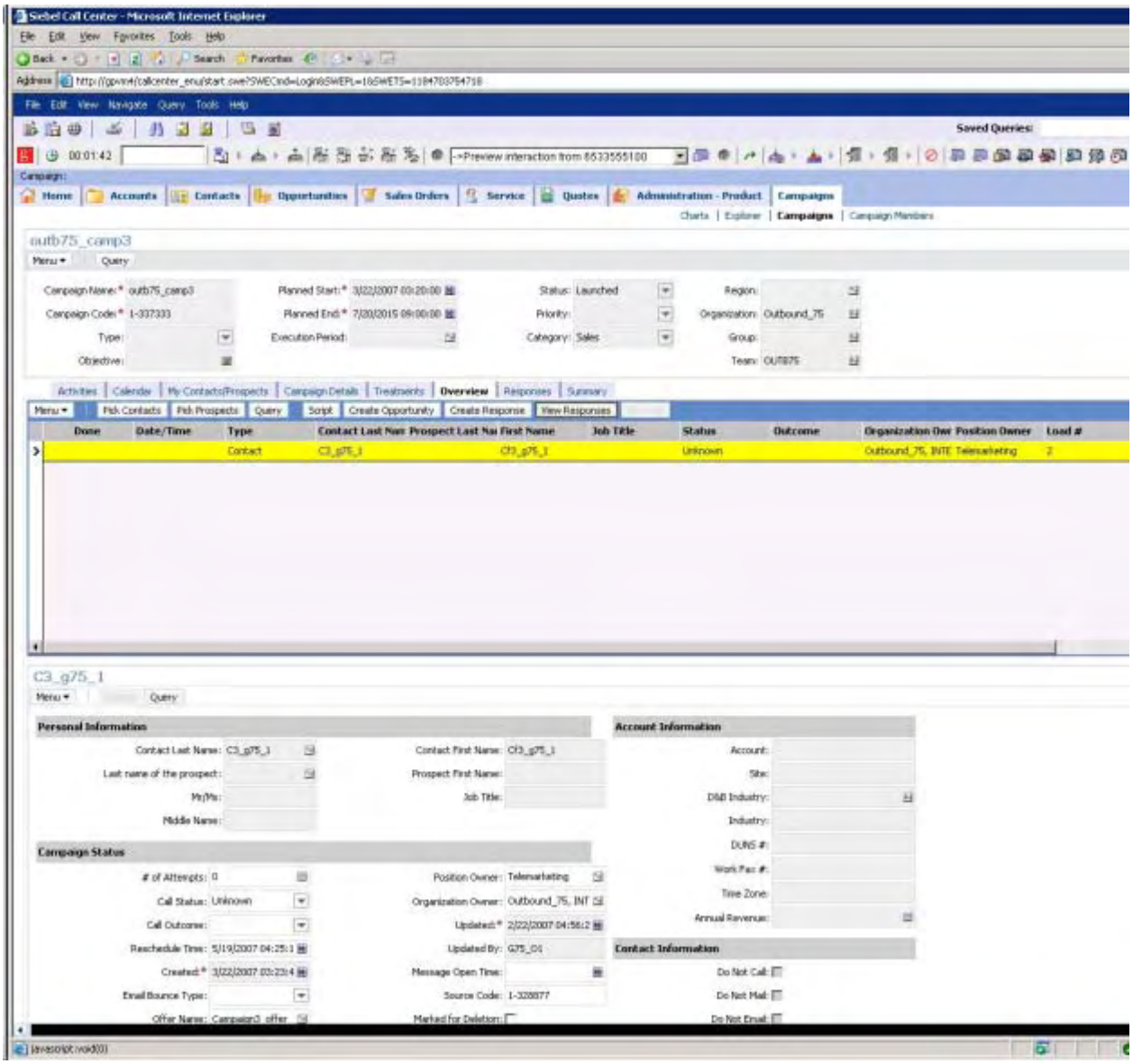

Figure 16: Preview Dialing Mode

Controlled Logout Option

When using OCS, the controlled logout option is available. This option enforces constraints that prevent an agent from logging out until certain conditions have been met. The details are explained below.

In Predictive Dialing mode, OCS can dial more calls than there are agents available in the group. The predictive dialing algorithm does real-time pacing calculations based on continuously sampled values of various parameters, including the number of available agents logged in within the sample group. For more information about the Predictive Dialing mode, see the *Outbound Contact 7 Getting Started Guide*.

When using Outbound Contact 7 with the G*plus* Adapter Outbound Campaign feature, and working in predictive dialing mode with the controlled logout option in force, you will experience the following circumstances and rules:

Due to the nature of the Predictive dialing mode, an agent cannot necessarily log out immediately, that is, by simply clicking the logout button. In this scenario, if the agent clicks the logout button, then a message appears in the top of the that agent's window area, displaying the number of seconds left until logout; for example, "You have 120 seconds before logout." This message displays for a few seconds and then disappears. If the agent wants to check the number of seconds before logout again, the agent can click on the logout icon and the current number of seconds until logout is displayed. The agent continues to receives interactions until he or she is completely logged out.

When the agent is completely logged out, that is, when the time for logout is reached, the logout icon becomes unavailable. Until that time, the agent continues to receive interactions.

If the logout time arrives while the agent is handling an interaction, the agent will not be automatically logged out until the interaction is completed.

When the agent logs out, a pop-up message appears. allowing the agent to select the reason for logout.

Refer to your System Administrator for details. The G*plus* Adapter Deployment Guide contains setup details that provide additional information.

Outbound Campaign Controls

The Communication Toolbar provides a set of Outbound Campaign buttons and controls, which function as described below. Because these communicate with the Outbound Contact Server (OCS), they are sometimes called the OCS Controls.

Note: Outbound Campaign Controls are also available in the Campaign Contact Details applet.

Figure 17 shows the Outbound Campaign toolbar and its buttons. The toolbar includes the `Mark Phone DoNotCall` and the `Record Cancel` buttons, which are described in the next section.

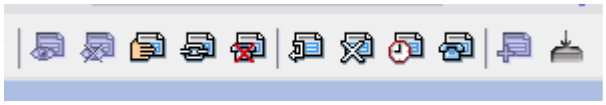

Figure 17: Controls for the Outbound Campaign functions

`Start Preview`: Starts the preview dialing mode session. This button is enabled after an agent has logged into Genesys, when the Outbound contact Server (OCS) is running, and the Campaign is loaded and started.

The Preview Mode Over and Request Record buttons also become enabled.

`Stop Preview/Preview Mode Over`: Finish the preview dialing mode session. This button is enabled after the Preview session is started. Note that the agent can not finish a Preview session until there are records on the agent's desktop.

`Request Record`: Sends a request to OCS for a new record. Upon delivery of the record to an agents desktop, a Siebel pop-up screen appears with customer information, and record-handling buttons on the Communication toolbar become active.

`Request Chain Record`: Sends request to OCS to deliver the rest of the chain (if it exists). Because a chain represents different phone numbers for the same Siebel contact (for example, home phone #, work phone #, and so forth), the same contact screen remains active. Each chained record creates a new item in the Work Items list. Switching between work items inside the same chain does not cause the contact screen to be refreshed.

`Reject Interaction`: Rejects record back to OCS server for further distribution to other agents. You can only reject a record if not operations have been performed on that record.

`Cancel Interaction`: Marks the record Canceled and removes it from the desktop. The Contact record will not be delivered to any agent for calling during current campaign. Note that this operation cancels the current contact and chain (if delivered).

`Mark record Do Not Call`: Marks the contact record as Do Not Call and removes it from your desktop. After marking, the Contact’s record is included in the Do Not Call list and will not be called again for any campaign. This operation marks the contact and the rest of chain as Do Not Call (DNC) such that the contact will not be used in any future campaigns. Several configuration options exist: Mark Phone DNC, Mark Record DNC, Mark Contact DNC based on customer ID. The *G*plus *Adapter Deployment Guide* contains detailed information about DNC administration.

`Mark Reschedule Interaction`: Updates the Outbound Contact Server database with selected time to receive a callback and reschedule type – Campaign or Personal. Campaign or Personal type should be selected from the popup window. Time should be selected on the Contact/Prospect Details View in the field Reschedule Time.

`Interaction Processed:` Completes work with the Contact record and removes it from the Work Items list on the Communications Toolbar. Clicking this button notifies OCS that operations with the current contact records have been completed and that a record of the final information must be permanently stored in the OCS database. This button removes the contact record and the rest of the chain from the Work items list on the Communications toolbar. If more records exist in the Work Items list, the agent's desktop screen refreshes and displays a pop-up contact screen for current record.

`Note:` You can transfer calls and set up conference call for Outbound Campaign calls. For basic information about Transfers and Conferences, refer to "About Transfer and Conference Calls" on page 44.

Contact/Prospect Details View

Changes to the following fields on the Contact/Prospect Details Applet view are updated or used for updates in the Genesys OCS database and the Siebel database:

- # of Attempts: The number of attempts made for a call record is sent to Outbound Contact Server as an UpdateCallStatus command attribute GSW_CALL_STATUS. Refer to Figure 18, below. Be aware that the OCS field showing the number of attempts is updated only while Preview Dialing Mode is running. While in Progressive/Predictive Modes, the G*plus* Adapter sends updates, but they are ignored by OCS (in compliance with OCS design specifications). For more information on this attribute, see the *Outbound Contact 7 Reference Guide*.
- Call Status: The status of a call sent to OCS as UpdateCallStatus command attribute GSW_CALL_STATUS. For more information on this attribute, see the *Outbound Contact 7 Reference Guide*.
- Outcome: The outcome of your interaction that you selected from the drop-down box. The value is stored only in the Siebel database.
- Reschedule Time: The rescheduled time you selected to receive a callback, which is sent to Outbound Contact Server as an attribute of the RescheduleRecord command.

Figure 18 shows the Number of Attempts dialog box.

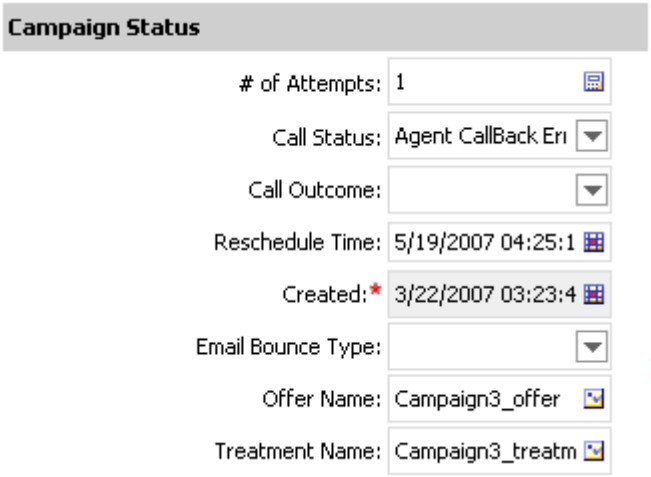

Figure 18: Number of Attempts Dialog Box

Working with an Outbound Call in Progressive or Predictive Dialing Mode

If you are working with outbound campaign calls, whether you are working in Predictive or Progressive Dialing mode, follow these steps to process an outbound campaign call:

1. Click the Ready button to make yourself Ready for the call.

   The OCS dials a call for you. When the call connects, the OCS transfers it to you, and the drop-down box in your Communications Toolbar displays the customer's phone number.

2. Click on the `Accept Phone` button to accept the call.

   If the customer record includes a chain, both records in the chain display.

   > `Note:` You can have a maximum of two chained records per customer.

   At this point, you can use a Call Result command to process the call. See "Using Call Result Commands" on page 54 for details. The following options are available to you:

   a. Transfer or conference (see also "About Transfer and Conference Calls" on page 44 for related information)
   b. Update record
   c. Schedule a Callback (personal or campaign)
   d. Add to Do Not Call list

3. To complete the call, select Update record to save the customer's information.
4. After you end your conversation with the customer, click `Ready`.

You are ready to take the next call.

Working with an Outbound Call in ASM Mode

If you are working with Outbound Campaign calls in ASM Dialing mode, follow these steps to process an Outbound Campaign call:

1. Click `Ready` to make yourself Ready for the call.

   The OCS dials a call for you.

2. Click `Accept Phone` to accept the call.

   After call is established, OCS dials Contact. When the call connects, the OCS transfers it to you, and the drop-down box in your Communications Toolbar displays the customer's phone number. Further workflow does not differ from working in Predictive or Progressive Dialing modes.

   If the customer record includes a chain, both records in the chain display.

   > `Note:` You can have a maximum of two chained records per customer.

3. At this point, you can use a Call Result command to process the call.

   See "Using Call Result Commands" on page 54 for details. The following options are available to you:

   a. Transfer or conference (see also "About Transfer and Conference Calls" on page 44 for related information).

   b. Update record

   c. Schedule a Callback (personal or campaign)

   d. Add to `Do Not Call` list

4. To complete the call, select `Update record` to save the customer's information.

5. After you end your conversation with the customer, click `Ready`.

You are ready to take the next call.

Working with an Outbound Call in Preview Dialing Mode

1. Click the `Preview Dialing Mode Start` button.

2. Click the `Preview Record Request` button.

3. Click the `Make Call` button on the Contact/Prospect Details applet. The OCS dials the call for you.

4. Click on the `Accept Phone` button to accept the call.

5. The following options are available to you (for descriptions of these options, see "Using Call Result Commands" on page 54):

   a. Transfer or conference (see also "About Transfer and Conference Calls" on page 44 for related information)
   b. Update record
   c. Schedule a new Call time (personal or campaign)
   d. Add to Do Not Call list

6. To finish the call:
   - Select Update record to save the customer's information.

You are ready to take the next call.

Accepting and Rejecting Preview Interaction Requests

An incoming preview interaction request creates a new work item on the Siebel Communication toolbar, and the "Accept incoming interaction" button starts blinking.

- To reject the interaction, press the active Reject button.

Using Call Result Commands

You can apply one of the following call result commands to a call to make a record of the way you processed that call, or to specify how the call or related callback should be processed:

- `Transfer:` Transfers or conferences the record. You can automatically switch between Conference and Transfer options. For example, consider a scenario in which you are talking with a customer and initiate a transfer call to a colleague using the TransferInit command. After clicking Transfer, you decide it may be helpful to remain on the call. In this case, you can click the Conference command and join the phone call.
- `Schedule a Callback:` To reschedule a call. When you reschedule a callback, you have the choice of selecting one of these callback types:
  - `Personal:` Reschedules a call and has the call delivered to you when the callback occurs.
  - `Campaign:` The default value for a record. This reschedules a call and has that call delivered to any agent in the campaign group when the callback occurs.

    In the current configuration, it is possible to select both types (Personal and Campaign) simultaneously by selecting the check box next to each type. However, you should only select one reschedule type per record.
- `Add to Do Not Call List:` To assign a customer to the Do Not Call list. When added to this list, the customer will not receive any new calls.
- `Process Records with the Same Call Result:` When processing records with the same call result, you can press the key combination Ctrl+S, and the record will be saved. This record will be updated in the Genesys Outbound Contact Server with the same call result.

These Call Result commands involve Outbound Contact Server (OCS) functions. For more information about call results, see the Genesys *Outbound Contact 7 Deployment Guide.*

Descriptions of Treatment Types

A treatment type is used to tell Outbound Contact Server how to respond to an unsuccessful call result (a call that does not reach the intended party). When you process a record, you have the choice of selecting one of two treatment types for unsuccessful call results:

- Personal
- Campaign

Select only one treatment type for each record.

Universal Callback Feature

Working with Universal Callback

This section presents simple scenarios that show different ways of working with the Universal Callback Server from the Siebel application.

To use the functionality of the Universal Callback Server (UCB) -enabled Siebel Call Center, you must create a callback request from either the Siebel desktop or the IVR side. After creating the callback request, the next step is to make an agent ready and wait for a callback request to be distributed from the voice callback queue.

Figure 19: Universal Callback Toolbar Buttons

Following are examples of how to work with Universal Callback.

- Initiate Callback call (in Callback Preview mode)
  - After the Callback interaction is delivered to agent and the Contact screen displayed, click the `Make Call` button on the Toolbar. This will initiate a call to the number, which was specified in the `VCB_CONTACT` key.
  - To initiate Callback to a different number,
    - Enter a new phone in the Phone field on the Toolbar

    or
    - Select and highlight any text on the agent's desktop and press `Initiate Callback`. These options will initiate a call to the selected number.

- Add callback (see Figure 20 on page 56):
  - Create a new Activity record
  - Set type to `Call`
  - Set `Priority`
    - Set to `ASAP`

    or
    - Set to other than `ASAP` and also set `Due` time
  - Specify the Routing Point
  - Save the record
  - Select `Home` or `Work` Phone number on the Contact Applet
  - Click the `Add` button
  - On the status line the message `"Callback to phone number 4151234567 has been added"` will be displayed.

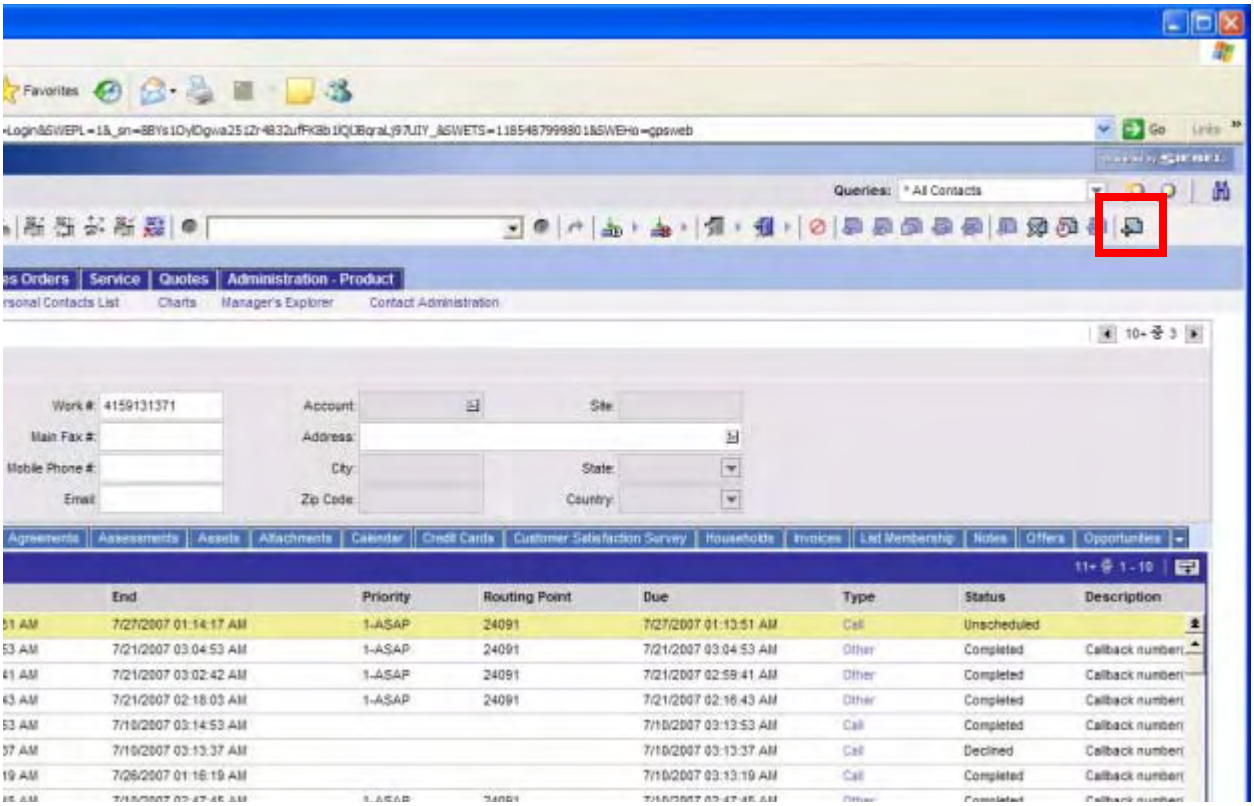

Figure 20: Add Callback

- Cancel Callback:
  - Locate Callback record
  - Click Cancel button
  - On the status line the message "Callback to phone number 4151234567 has been cancelled" will be displayed.
- Reschedule Callback:
  - Locate Callback record
  - Set “Due” time
  - Change Priority to non “ASAP”
  - Save record
  - Click Reschedule button
  - On the status line the message "Callback to phone number 4151234567 has been rescheduled" will be displayed.

Expert Contact Feature

Expert Contact Feature Controls

On/Off call button

Working with Expert Contact

Following is an example of how to work with Expert Contact interactions.

1. Log in as an Agent and select the Ready button.
2. Press the On Call button on the Siebel Communication toolbar.

   A new incoming call from an Unknown recipient will appear in the Work Items list on the Toolbar. Proceed with the call as if it were an incoming call so Genesys can track the call. From this point onward, use the same checking process applied to the Basic Voice feature, with the exception of testing of the confirm-status option.
3. If the Confirm-status option is implemented, then a pop-up window should appear after the defined time-out period. That is, if an expert is on the call after the length of time set by the timer, a dialog box appears asking if the expert is still on the call and if the agent wants to continue.
4. To use the Preview-interaction option (Preview mod)e installation when Preview mode is turned ON:
   - When an agent receives an incoming call, a new work item, Preview Request, is created on the Siebel Communication Toolbar, and the Accept Incoming Interaction button starts blinking. To accept the interaction, press the blinking button and use standard procedures for the call. Newly created call will reuse existing work item.

- If the Siebel preview-bell option is implemented, then you can use it by sending a interaction to an expert. A sound amy be played when the preview interaction dialog box appears.

5. If the Preview mode is set to OFF, then the Agent's work flow options are exactly the same as in the Basic Voice feature. The agent can place outbound calls, receive incoming calls, and make transfers.

Confirm Status Option

If an expert forgets to use the desktop to indicate that she has completed a call, the Confirm Status option provides a reminder. More specifically, if the confirm-status option in the CTI-Less T-Server configuration object is set to true and its associated timer setting value is defined, then if an expert is on the call after the length of time set by the timer, a dialog box appears. The dialog box asks the expert if she is still on the call and if she wants to continue. This option addresses the possibility that an expert might forget to indicate that the call was completed after the call was actually released.

Multimedia Component

The Multimedia Component provides E-mail and Chat features. This section describes how to use these features.

Access to multimedia functionality is available through the Siebel toolbar controls and controls on media-specific views (Chat, E-mail). These are described below.

Controlling Agent Status

Multimedia Login/Logout

Multimedia login buttons are shown in Figure 21. Multimedia logout buttons are shown in Figure 22.

Figure 21: Multimedia Login Buttons

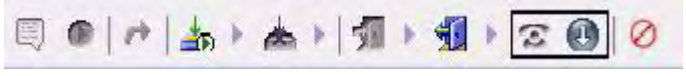

Figure 22: Multimedia Logout Buttons

Ready/Not Ready Per Media Basis

Group buttons are provided to make the agent Ready or Not Ready for all channels. To set the agent Ready *per channel*, use individual buttons. Refer to Figure 23.

Figure 23: Ready/Not Ready Buttons

Working with Genesys E-mail

G*plus* Siebel Multimedia E-mail allows handling of e-mail interactions. Typical scenarios for handling e-mail interactions include:

- Receiving Genesys E-mail
- Replying to Genesys E-mail

Receiving Genesys E-mail

To be able to receive inbound interaction of Genesys E-mail, the agent should log in to Siebel and make himself/herself Ready for the Genesys E-mail channel.

When a new inbound e-mail interaction arrives, Genesys Multimedia routes the e-mail to the agent. The agent sees a flashing icon and the status line displays that a new e-mail interaction has arrived.

The agent clicks the `Accept` button to start work with the interaction. After the interaction is accepted, the new workitem appears in the list and the Adapter automatically shows the content of the e-mail (see Figure 24 on page 60).

Note: If the e-mail body is larger then 16KB, the entire original message body will be saved as an attachment, and a note that the body was attached is displayed. For example: `Message is too large... whole content is attached as EmailBody.htm`. The administrator can configure this note as desired.

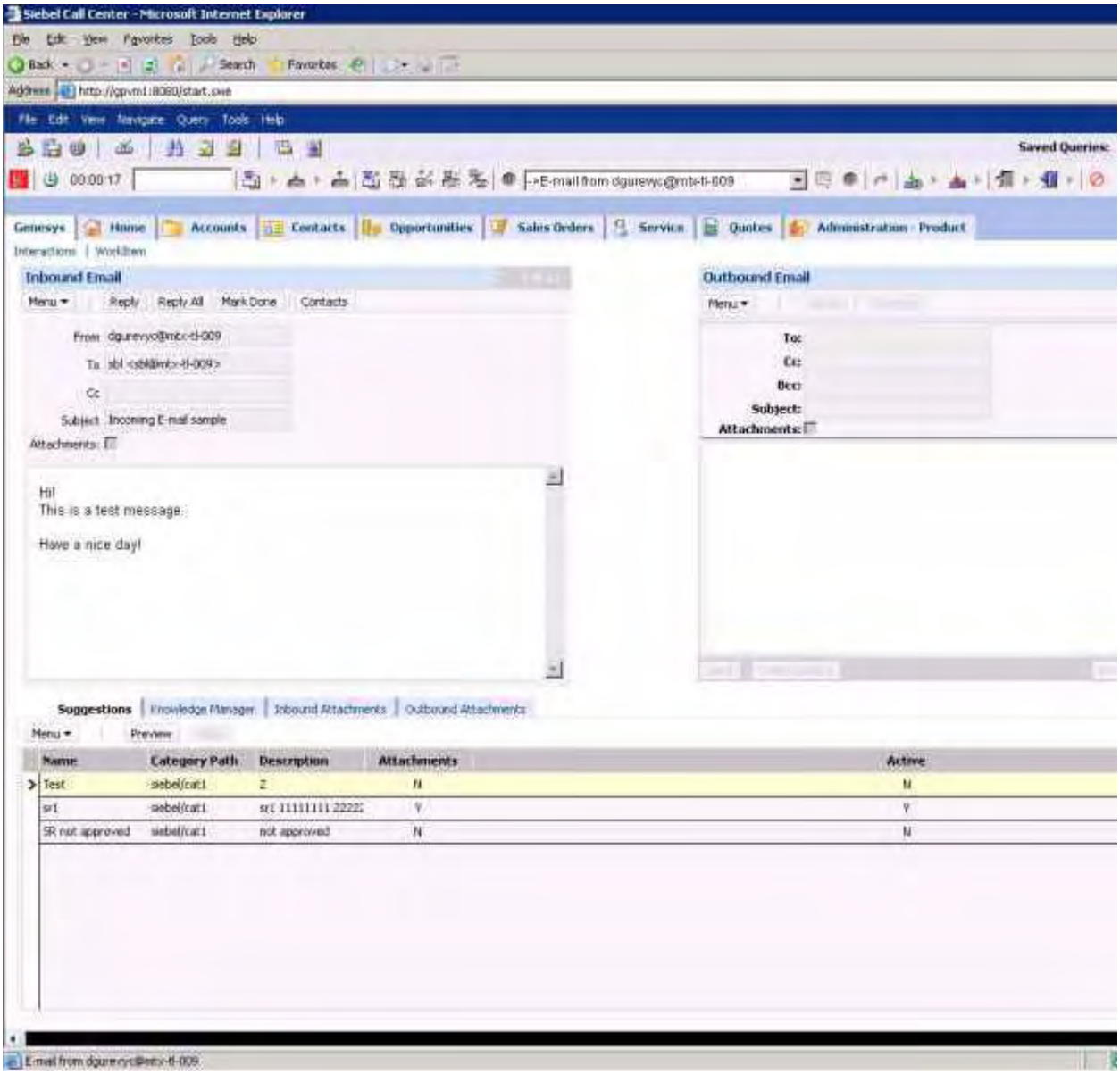

Figure 24: Receiving Genesys E-Mail

At this time, agent can perform the following actions:

- Transfer the inbound e-mail directly to another agent
- Transfer the inbound e-mail to another queue, so that another agent group can process the interaction
- Mark the interaction as Done
- Reply to the accepted e-mail (see “Replying to Genesys E-mail” on page 61).

Replying to Genesys E-mail

The agent clicks the `Reply` or `Reply All` button to create a reply for the inbound e-mail. At this time, the inbound interaction will be marked Done and a new outbound e-mail interaction will be created.

The reply interaction will be created as a child interaction of the inbound. Screen navigation will be automatically performed by the Adapter. On this screen, both the inbound and outbound interactions will be displayed as shown in Figure 25. E-mail formatting (HTML or plain text) of created e-mail depends on the format of the inbound e-mail. If the inbound e-mail is plain text, the reply will be created as plain text. If the inbound e-mail is HTML, the reply will be created as HTML e-mail.

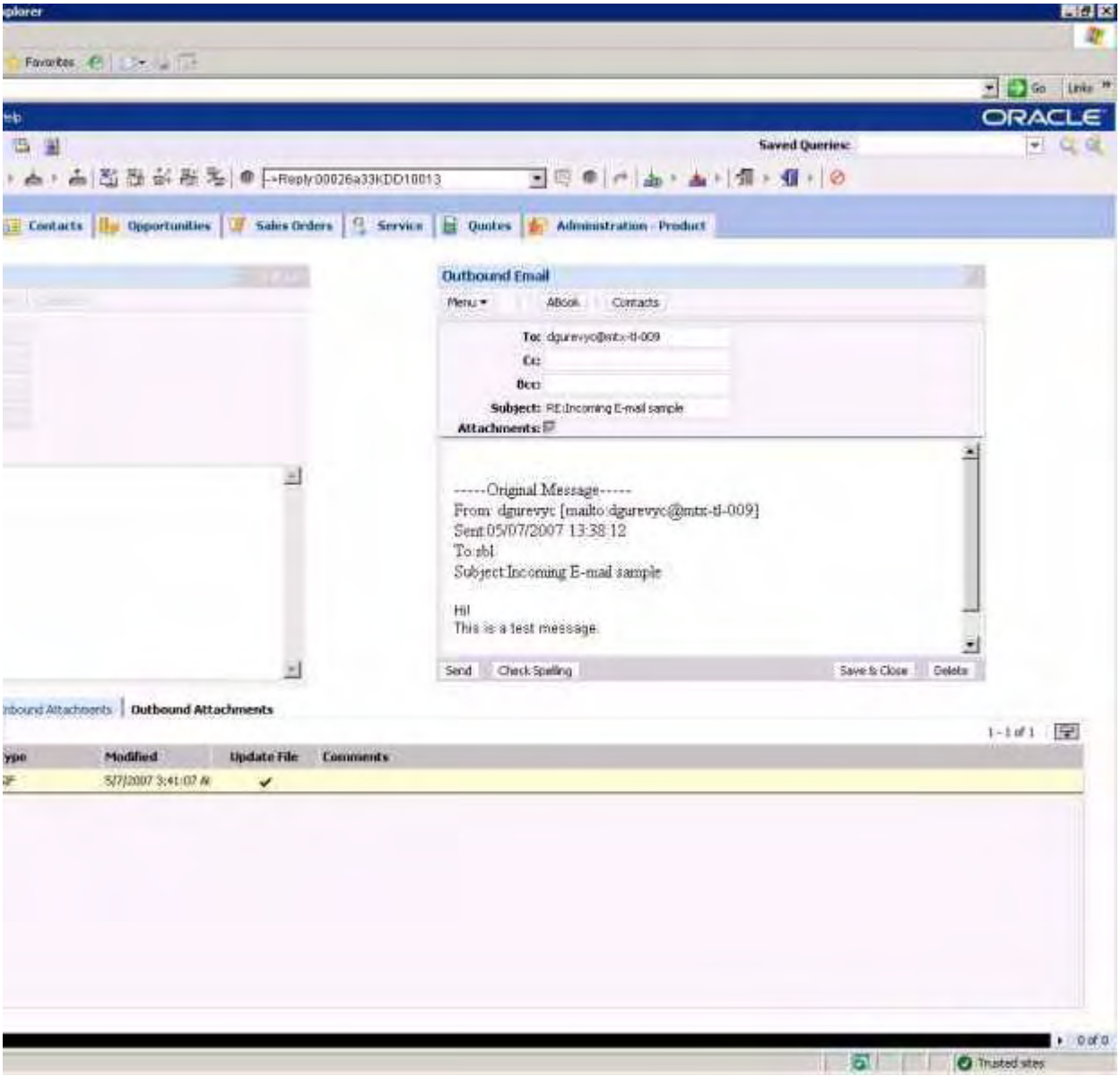

Figure 25: Replying to Genesys E-Mail

The initial content of the outbound interaction will contain a copy of the inbound interaction content. (In the event that the total size of the generated initial content exceeds a system limit of 16,000 bytes, only the heading information about the original inbound interaction, with a short note that the administrator can configure, will be provided. In such a case, it is necessary to copy the essential part of the original e-mail into the reply.)

The Cc and To lines also will be filled depending on which action (`Reply` or `Reply All`) was requested.

In this mode, the agent can attach files, edit To (Cc) manually, or use a popup screen with a list of contacts. The agent can check spelling using a standard Siebel spell checker. At the bottom of the screen there is a tab that provides access to the list of attachments.

Actions available to the agent for an outbound e-mail interaction include:

- Transfer prepared outbound reply to another agent to continue processing
- Transfer prepared outbound reply to queue to continue processing by another agent group
- Send e-mail reply
- Save the interaction to continue processing at a later time
- Delete the interaction

When the agent saves the interaction, the interaction is placed into the MCR workbin. Available workbins are configured using the List Of Values, where the Name field defines Siebel's name for the workbin and Value is the name of the workbin in Genesys. Only personal workbins are supported.

Using Workbins

The agent can save an outbound reply to postpone interaction processing. The Adapter prompts the agent to choose a workbin in which the interaction will be stored, as shown in Figure 26.

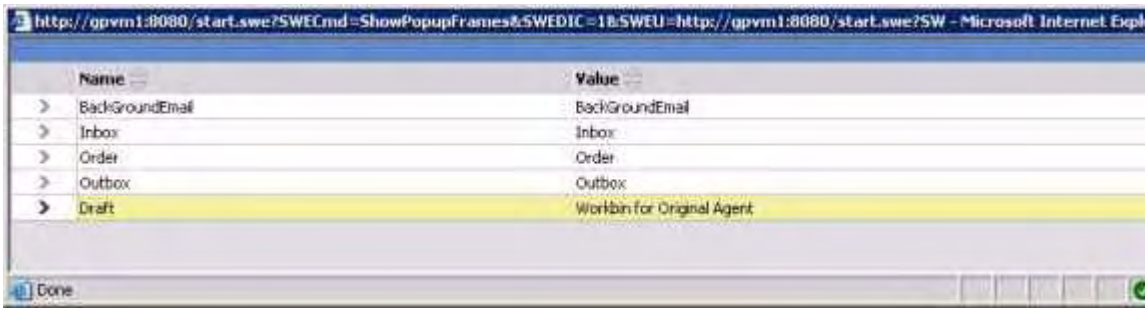

Figure 26: Workbin List

The agent can open a saved interaction at any time to continue processing, as shown in Figure 27 on page 63.

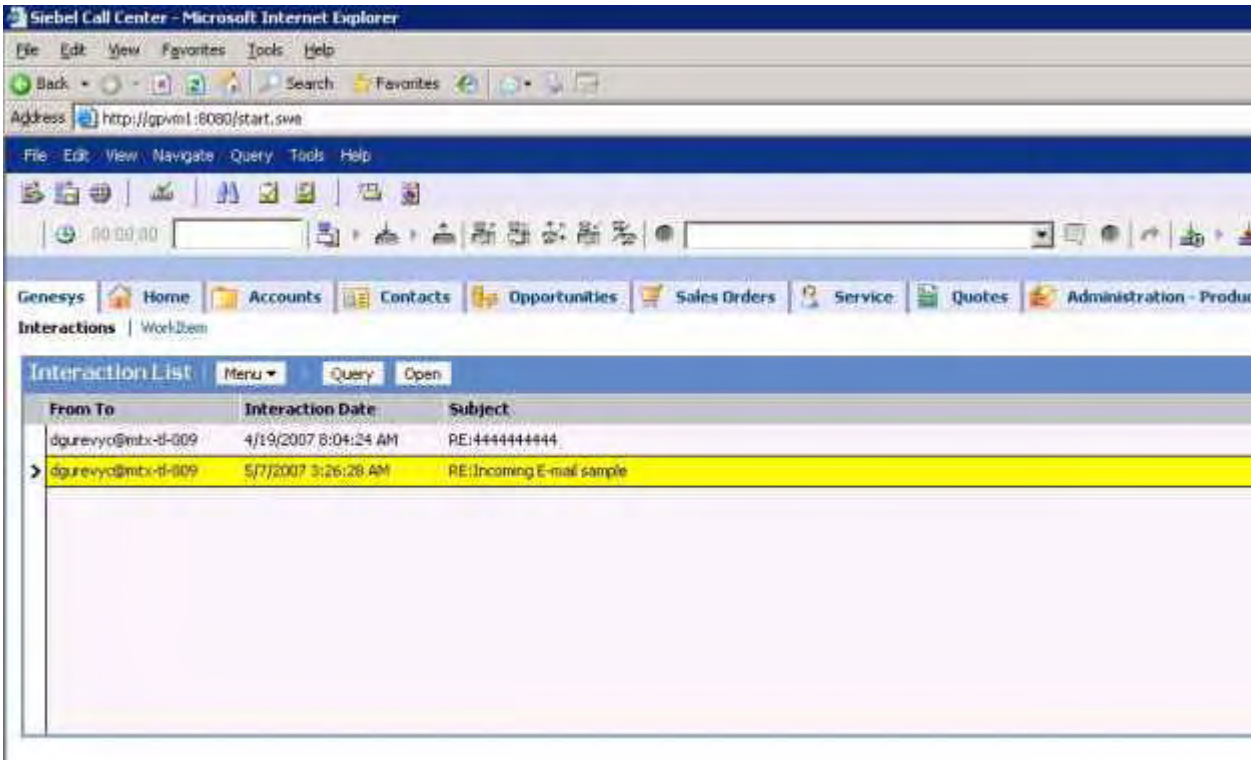

Figure 27: Interaction List

Interactions can be edited by other applications. When the agent opens an interaction, it will always display its most recent content.

Working with Chat

The G*plus* Siebel Multimedia Chat client allows handling chat sessions originated from Genesys-compatible chat clients.

A sample scenario is provided below:

1. Client connects to chat service from a Genesys-compatible chat application (see Figure 28).

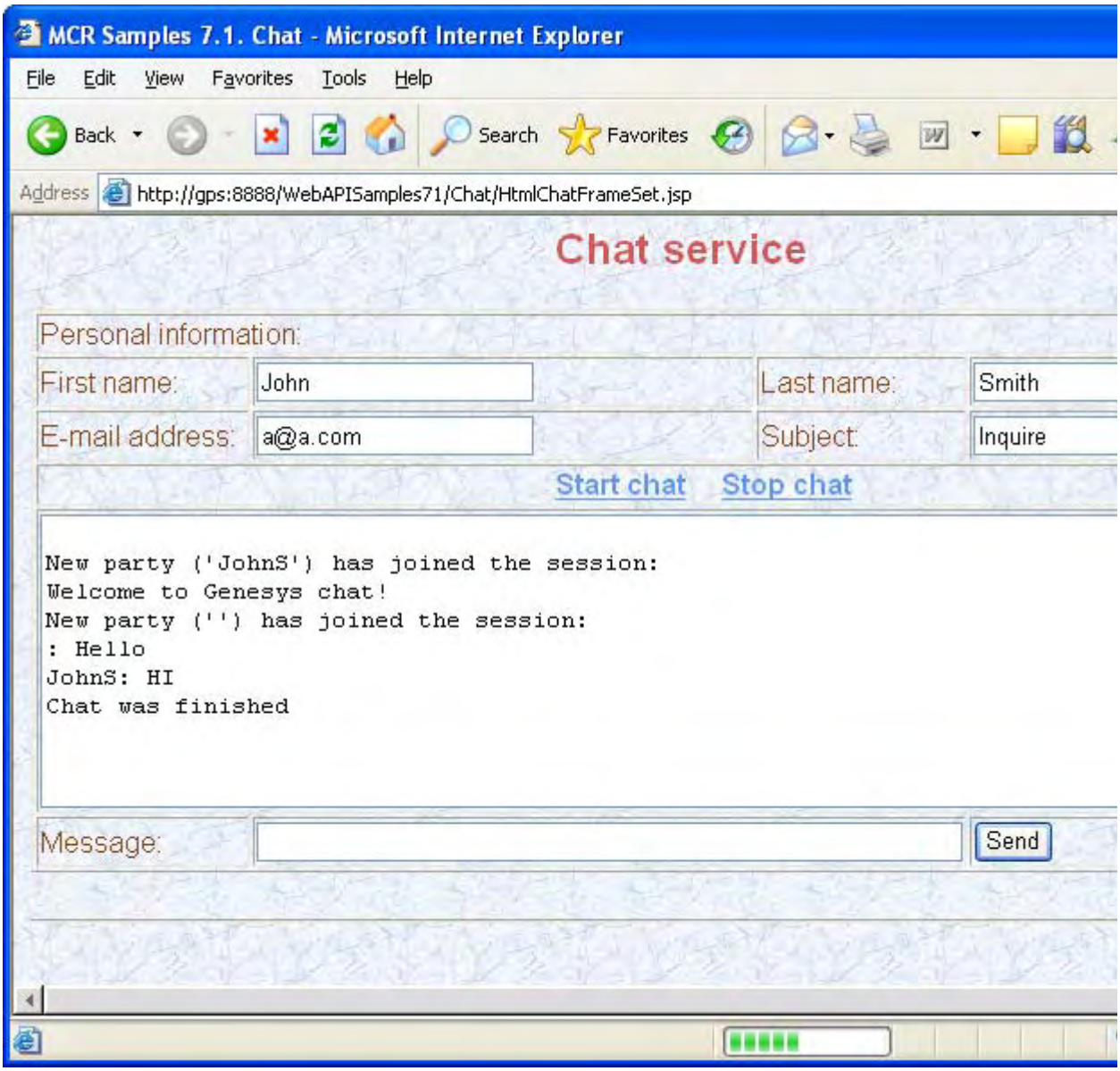

Figure 28: Client Connects to Chat Service

2. Agent logs in and makes himself/herself `Ready`. A Chat request is distributed to the agent. (see Figure 29).

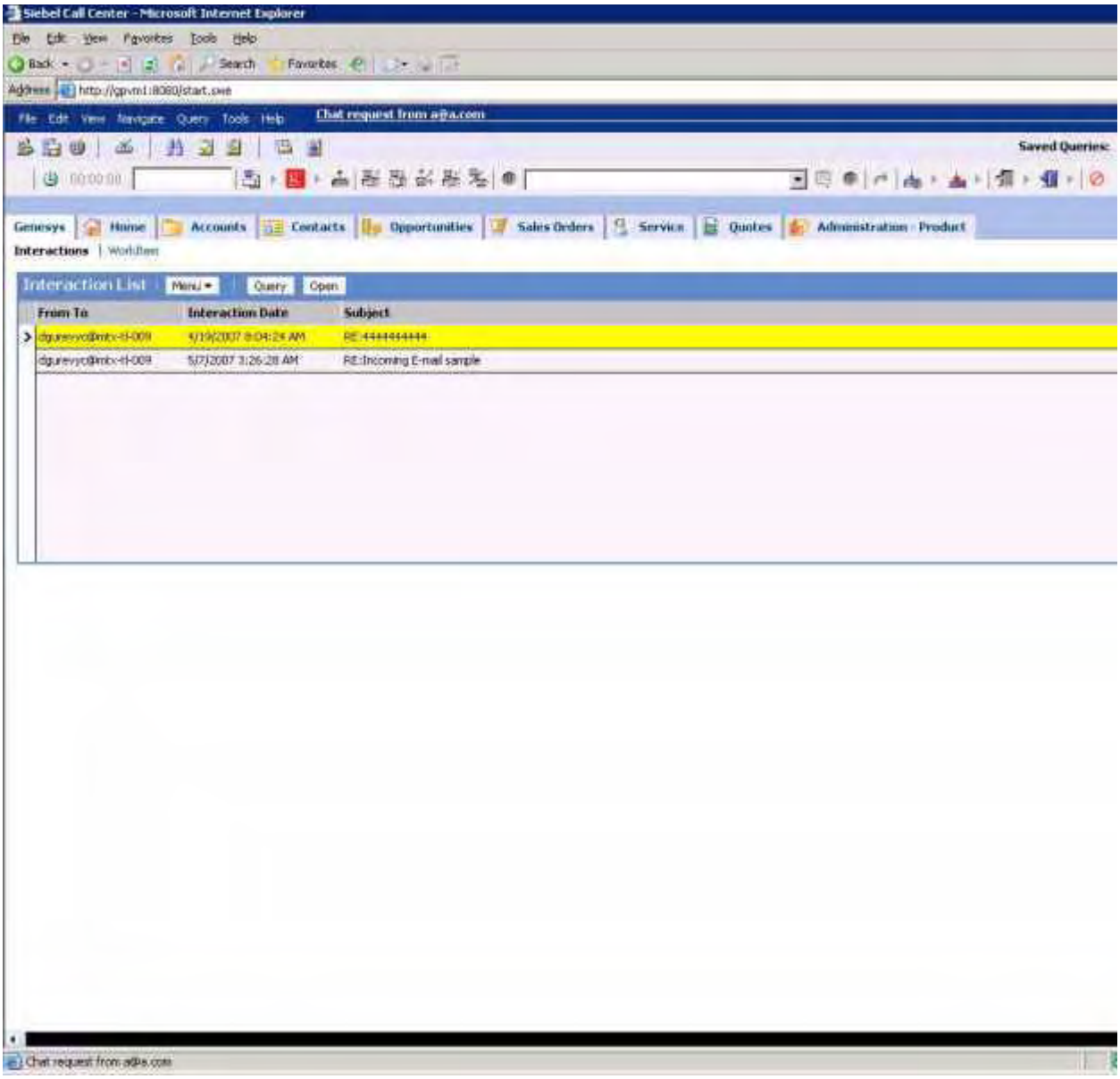

Figure 29: Agent Receives Chat Request

3. The agent clicks the `Accept` button to accept the interaction and open the Genesys Multimedia chat screen with Knowledge Manager and Standard Response Library (SRL). (See Figure 30).

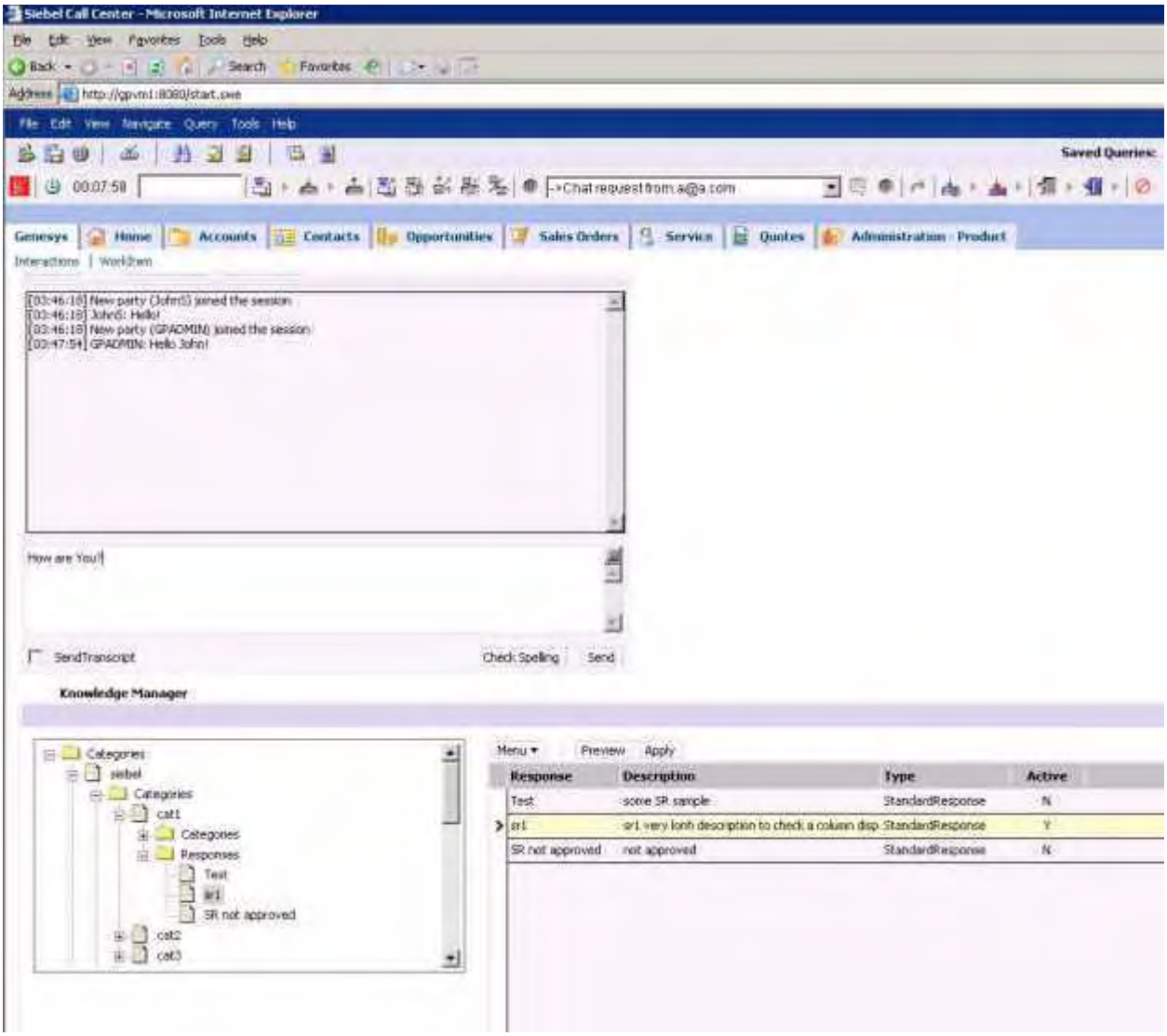

Figure 30: Chat Screen Opens

4. The agent and client send messages to each other to conduct a chat session (see Figure 31). While typing a message the agent can check spelling using a standard Siebel spell checker. Newer messages appear on the bottom of the chat window by default. The administrator can configure the chat transcript direction as desired.

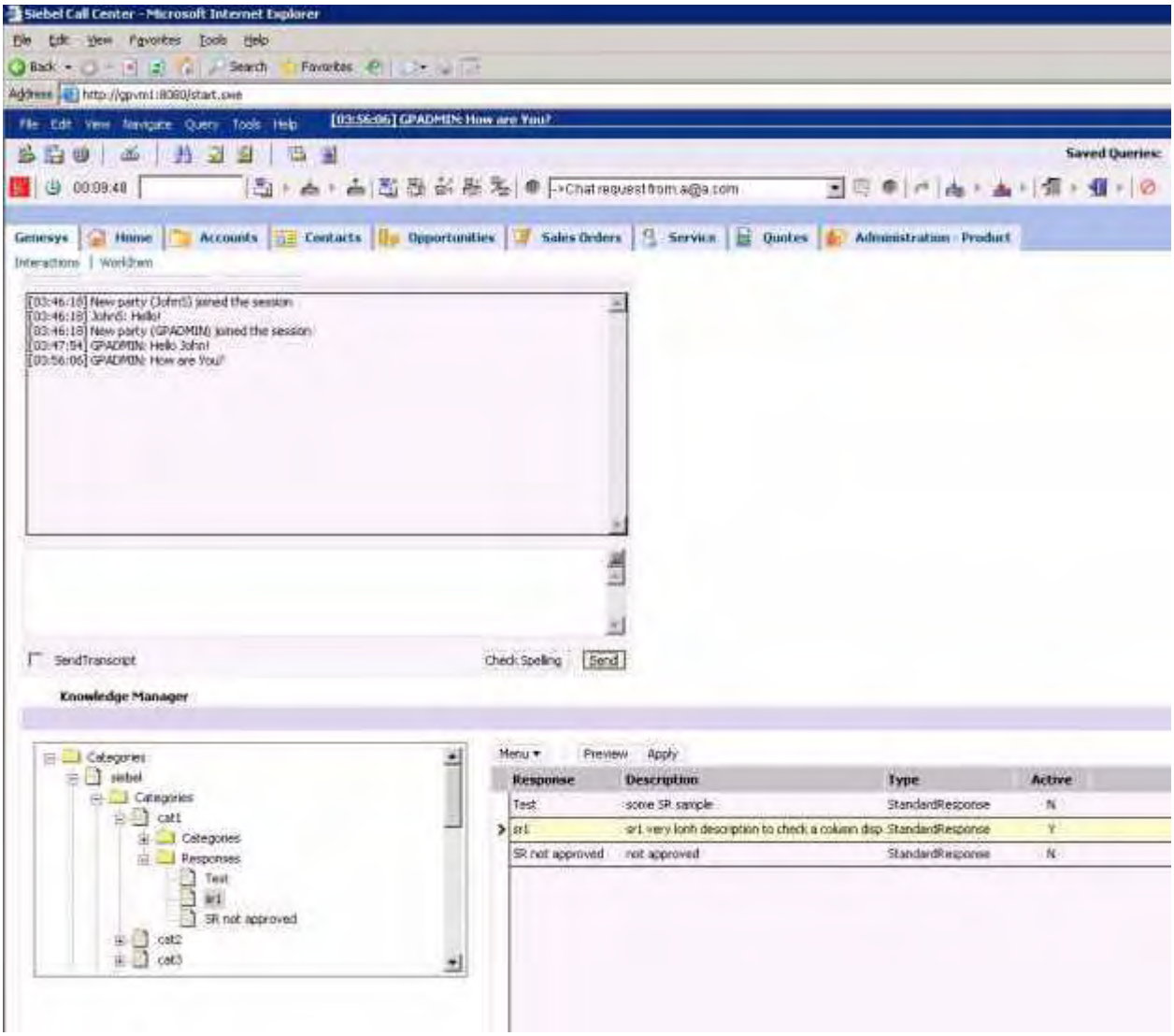

Figure 31: Chat Session Proceeds

5. If a chat message comes when the appropriate chat interaction is *not* active, a special toolbar button becomes active and "blinking" (see Figure 32 on page 68). This button allows the agent to quickly make the appropriate chat session active.

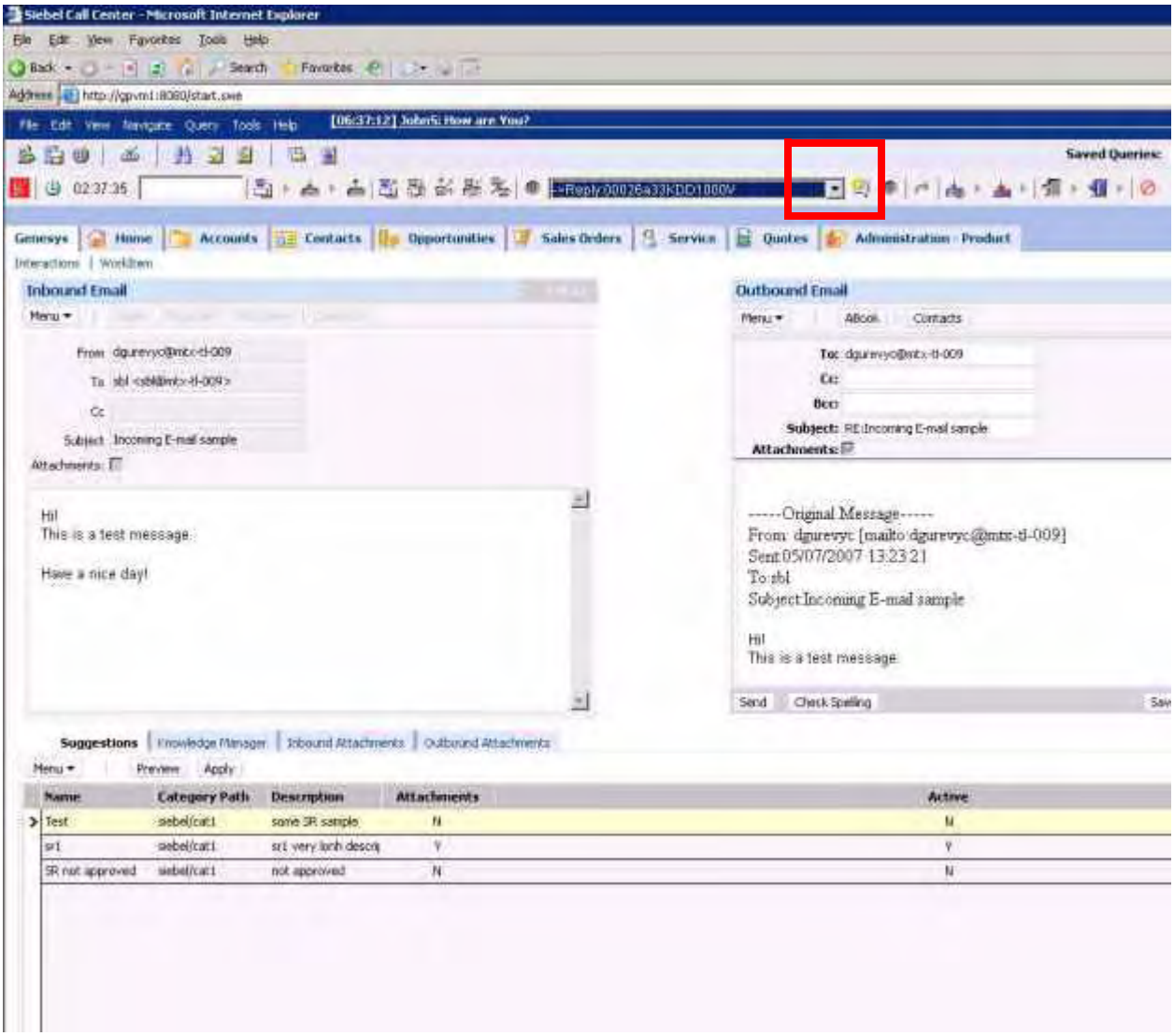

Figure 32: Make Appropriate Chat Session Active

Also, the agent can perform the following actions:

- Transfer the chat session directly to another agent
- Transfer the chat session to another queue, so that another agent group can process the interaction

6. Another party may leave the chat session, or an agent can explicitly leave the chat session using the `Leave Chat` button. After the chat session becomes offline, the agent can look at the transcript and perform some post-processing activities (see Figure 33).

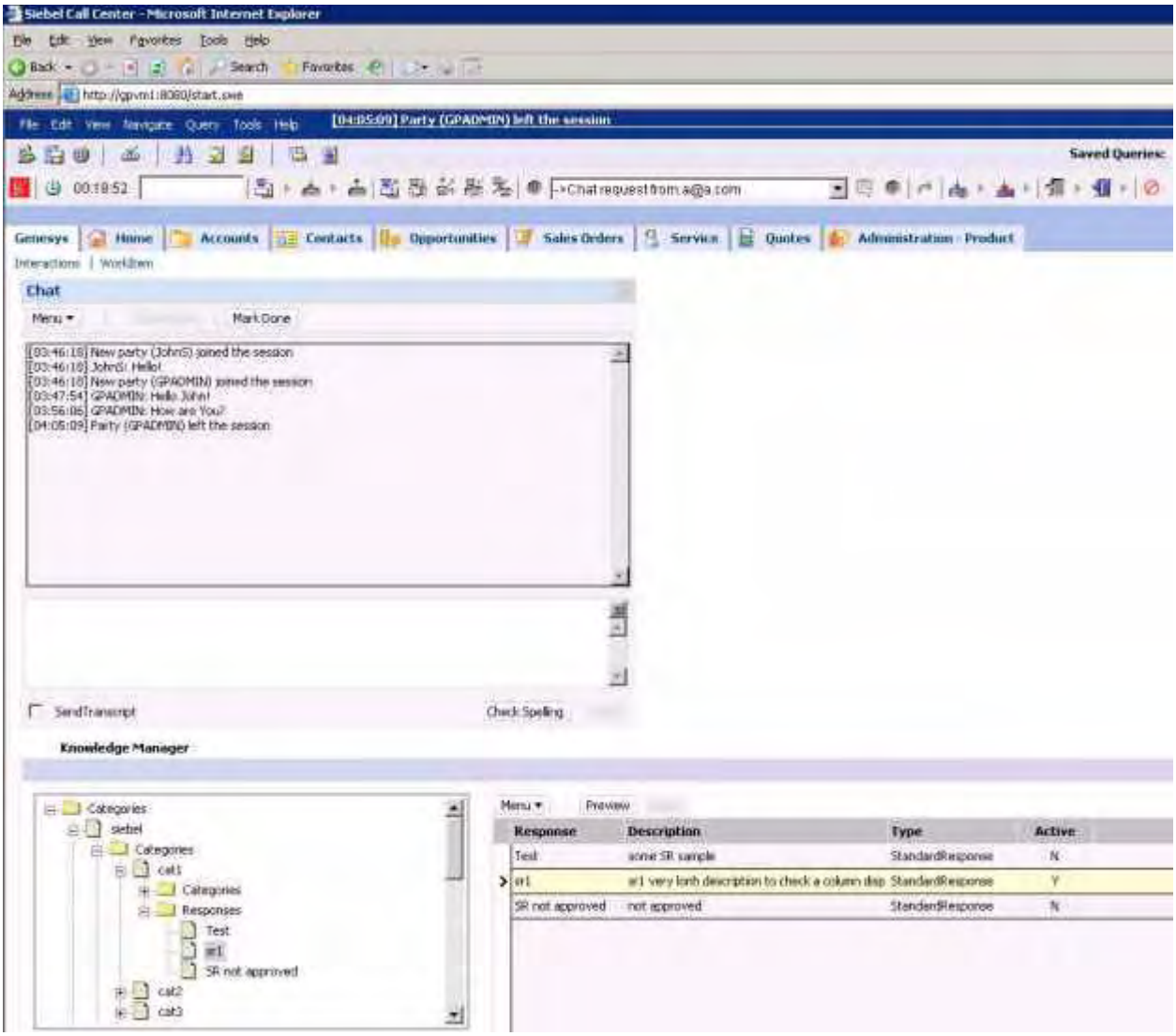

Figure 33: Chat Session Concludes

7. To completely remove the chat interaction from the desktop, the agent must use the `Mark Done` button. Please note that it is possible to configure the transcript function such that the transcript will never be sent to the customer, or will automatically be sent to the customer regardless of the state of the `Send Transcript` check box. Please consult your administrator about these configuration preferences.

Transferring Genesys E-Mail and Chat Interactions

Whenever the agent works with a Genesys interaction (Inbound and Outbound E-mail or Chat) the agent can transfer it directly to another agent or to another queue. To do this:

1. Click the `Transfer` button on the Communication toolbar (see Figure 34).

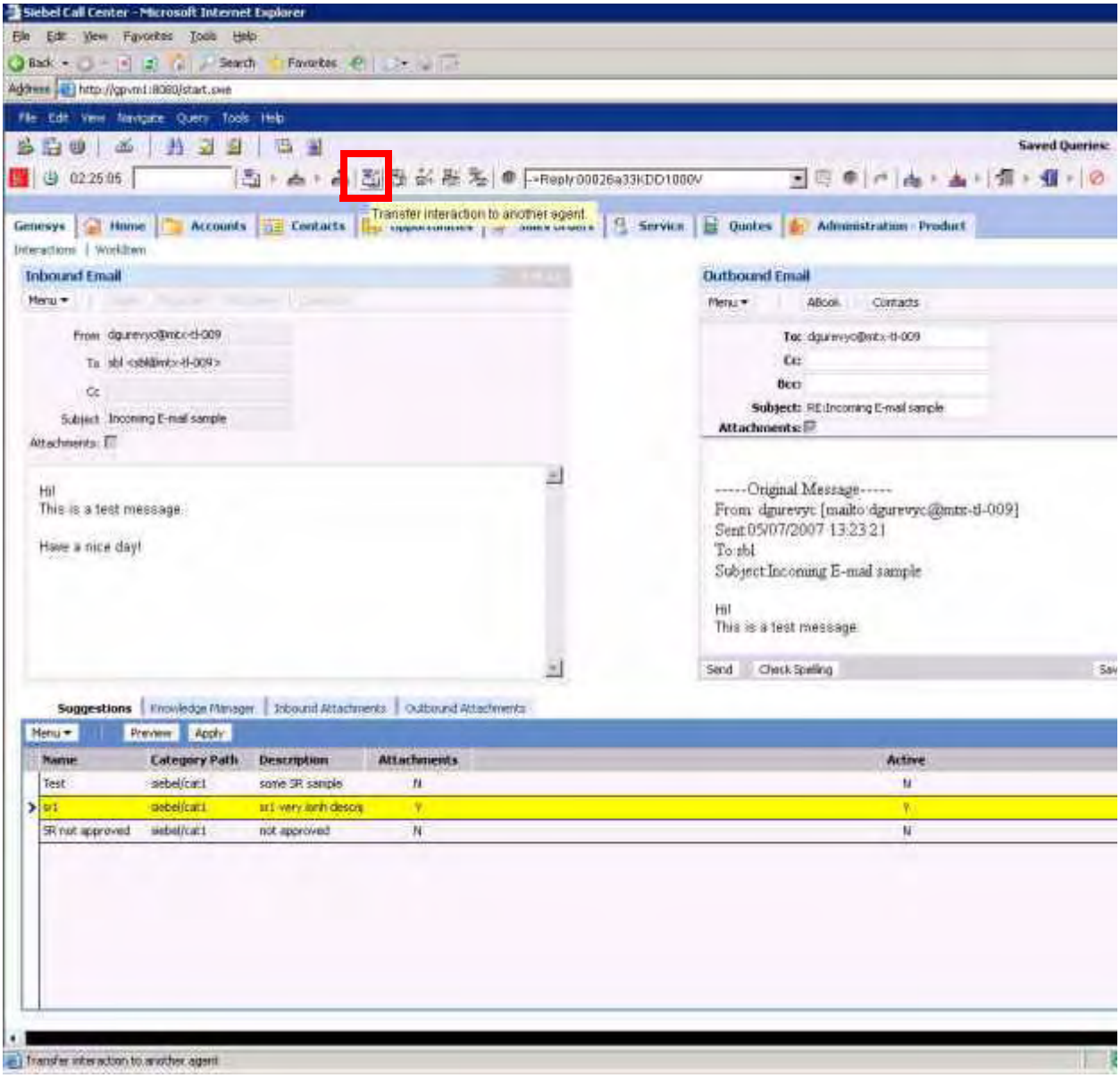

Figure 34: Transfer E-Mail or Chat

After you click the Transfer button, the applet for transferring an interaction to an agent appears (see Figure 35).

This applet allows you to choose an agent to transfer to, and also switches to the applet for transferring an interaction to a queue (see Figure 36). The applet for transferring an interaction to a queue allows switching to the applet for transferring to an agent as well.

Figure 35: Transferring an Interaction to an Agent

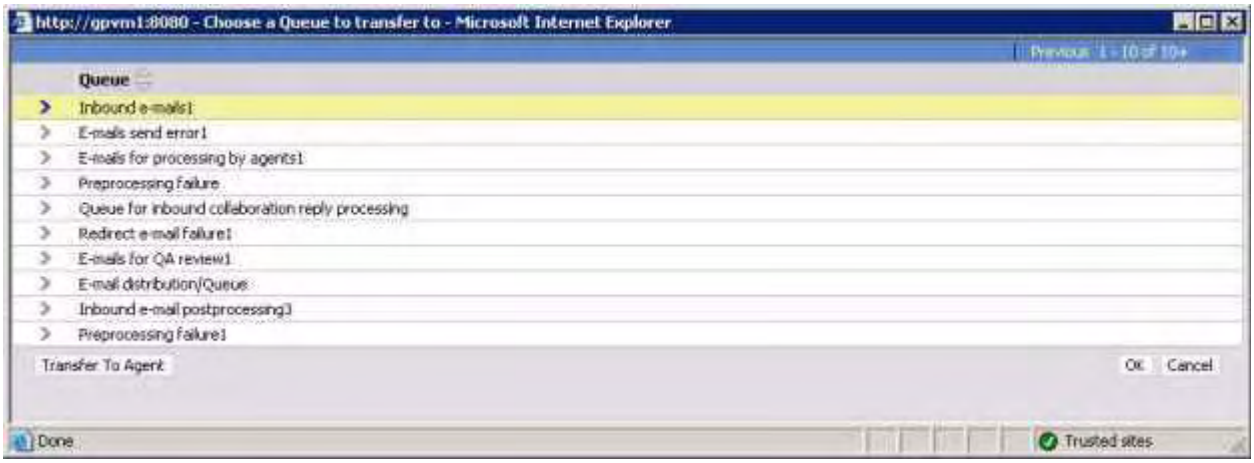

Figure 36: Transferring an Interaction to a Queue

Working with Multiple Interactions Using Genesys Standard Response Library

Standard response preview is available for inbound and outbound E-mail interactions and for Chat interactions.

When an outbound E-mail interaction or Chat interaction is active, the Apply button is enabled. It allows inserting a rendered body of a standard response into the head of the outbound e-mail's body or into the head of the new chat message.

Because the Standard Response Library (SRL) has a hierarchical structure, the Knowledge Manager tab contains a tree control which allows navigation through categories and subcategories. For each category and subcategory, a list of standard responses is provided as shown in Figure 37 on page 72.

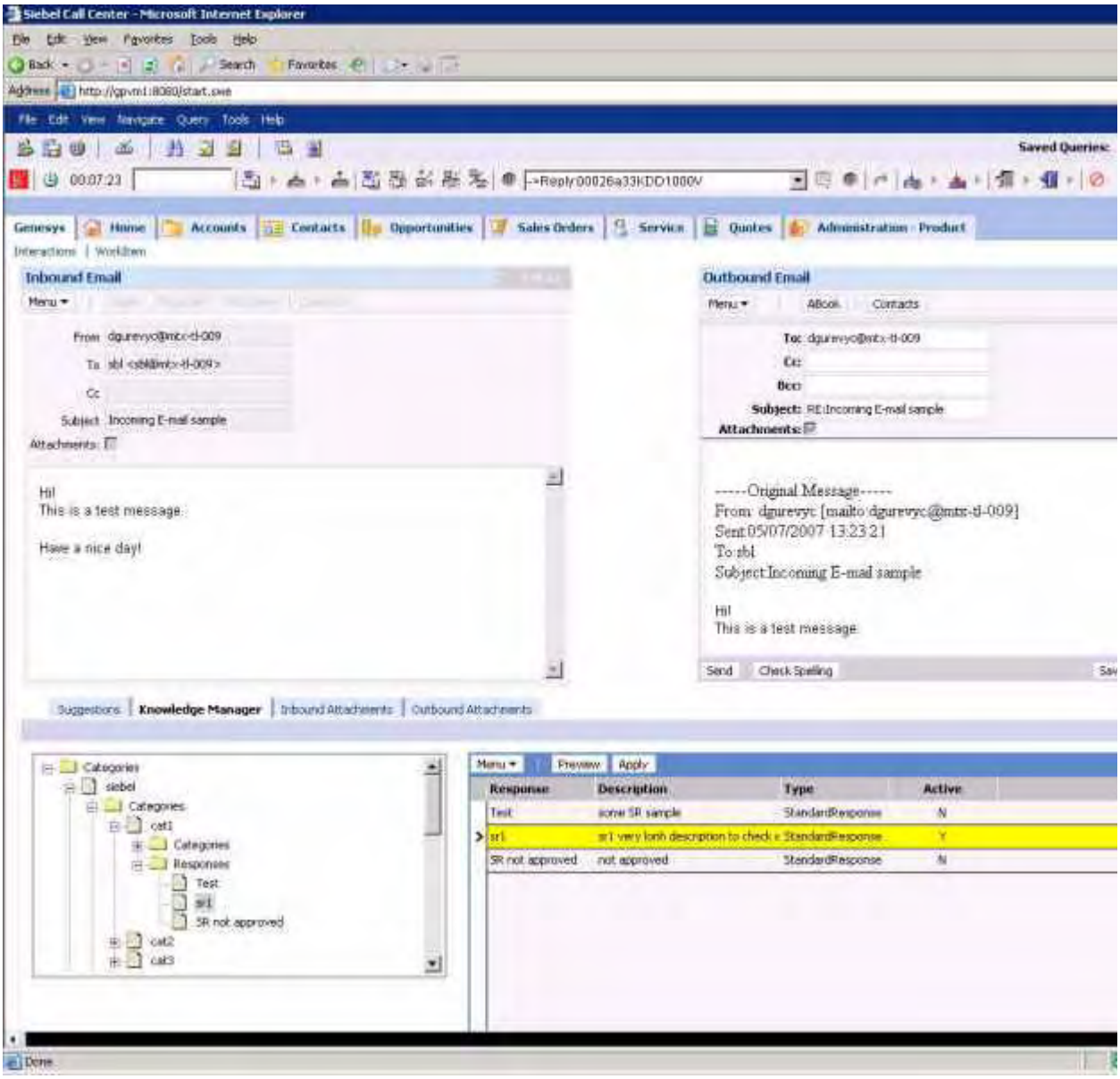

Figure 37: Standard Response Library - Knowledge Manager Tab

When a response is selected, the user can see its content as it is stored in the SRL (not rendered).

The Apply button renders the response using the interaction context to substitute field codes, and inserts text into outbound e-mail. If the agent wants to preview the rendered standard response before inserting, the agent should use the Preview button instead.

The Preview button shows a rendered response including field codes if any. A sample is shown in Figure 38 on page 73.

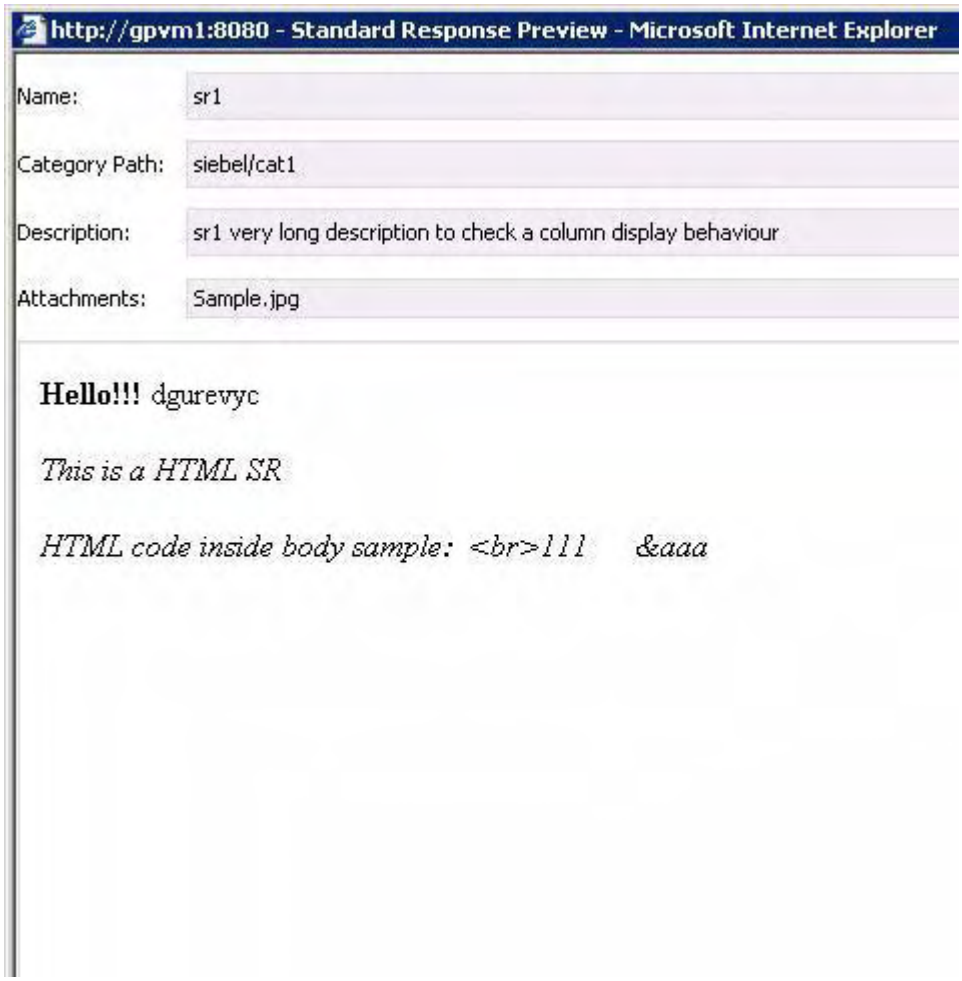

Figure 38: Standard Response Preview Sample

Standard response preview is available for both inbound and outbound interactions.

When an outbound interaction is active, the Apply button is enabled. It allows inserting a rendered body of a standard response into the head of the outbound e-mail's body.

The usual copy-paste method is allowed at any time.

At the same time, the Suggestions tab allows the user to look through standard responses which are suggested for an active interaction. Suggested responses are listed in a table form in this tab as shown in Figure 39. The Preview and Apply buttons are also available here to preview or insert any chosen response.

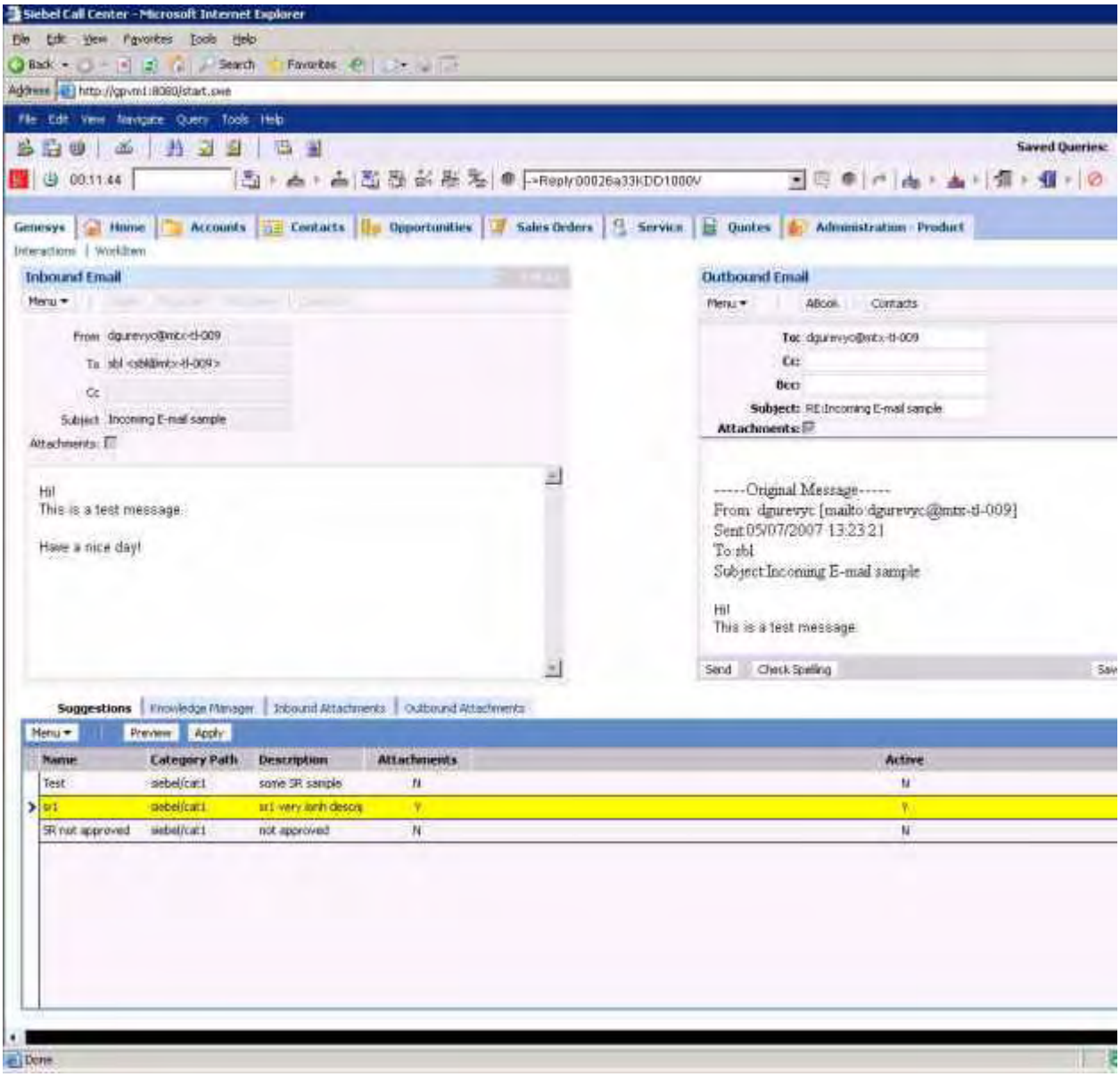

Figure 39: Standard Response Library - Suggestions Tab

Media Routing Component

Desktop Controls for Processing Siebel eMail

The desktop controls used by agents to process Siebel eMails are similar to other e-mail processing programs. See a description of desktop controls for Siebel eMail processing below.

The G*plus* Media Routing Component for Siebel may be used for routing any type of interactions, but as installed, it does not provide any agent interface for this. Siebel administrator customization is required. Please consult your Siebel administrator about desktop controls for particular types of interaction processing. Usually, Login, Logout, and Accept buttons are common for any interaction type, if they are not customized differently by your Siebel administrator.

Accepting E-Mail Messages

When a new e-mail message arrives, the icon shown in Figure 40 blinks, and a notification message displays. To accept the new e-mail message, click the Accept button. The view for the new interaction displays.

Figure 40: Incoming E-Mail Icon

Note: An agent should not accept a new e-mail message until finished processing the current e-mail message.

Sign Off from the Media Routing Component

To log out of the Adapter, click the Agent Sign Off button (see Figure 41 on page 76). This will log you out from all media types you are currently logged into.

Working with E-Mail

Following are examples of how to work with e-mail. The basic controls are standard Siebel controls.

Logging Into the Media Routing Component

To log into the Media Routing Component, first make yourself Ready, then select the E-mail button. Refer to the instructions for "Making Yourself Ready or Not Ready" on page 39. After you have logged into a media type, the toolbar changes back to how it appears in Figure 41 on page 76; only now, the Agent sign off button is available.

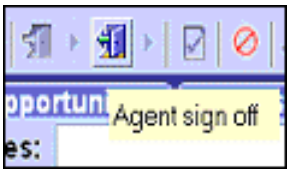

Figure 41: Agent Sign Off Button

Responding to E-Mail Interactions

1. Click Ready before you can accept any new interactions.
   You are notified of a new e-mail message.

   Click the flashing icon shown in Figure 42 to accept the incoming e-mail message.
   The Communications Tab displays and the customer information appears on the screen.

Figure 42: Incoming Genesys Interaction Icon

2. Click `Reply` to reply to the sender and type a response in the text area.
3. If you need to add an attachment, click the `Attach` button and locate the document you want to attach.
4. Click `Send` to send the message. You can also save your message as a draft, or click `Cancel` to cancel the reply message.
5. Click `Done`.

Now you are ready to accept the next e-mail interaction.

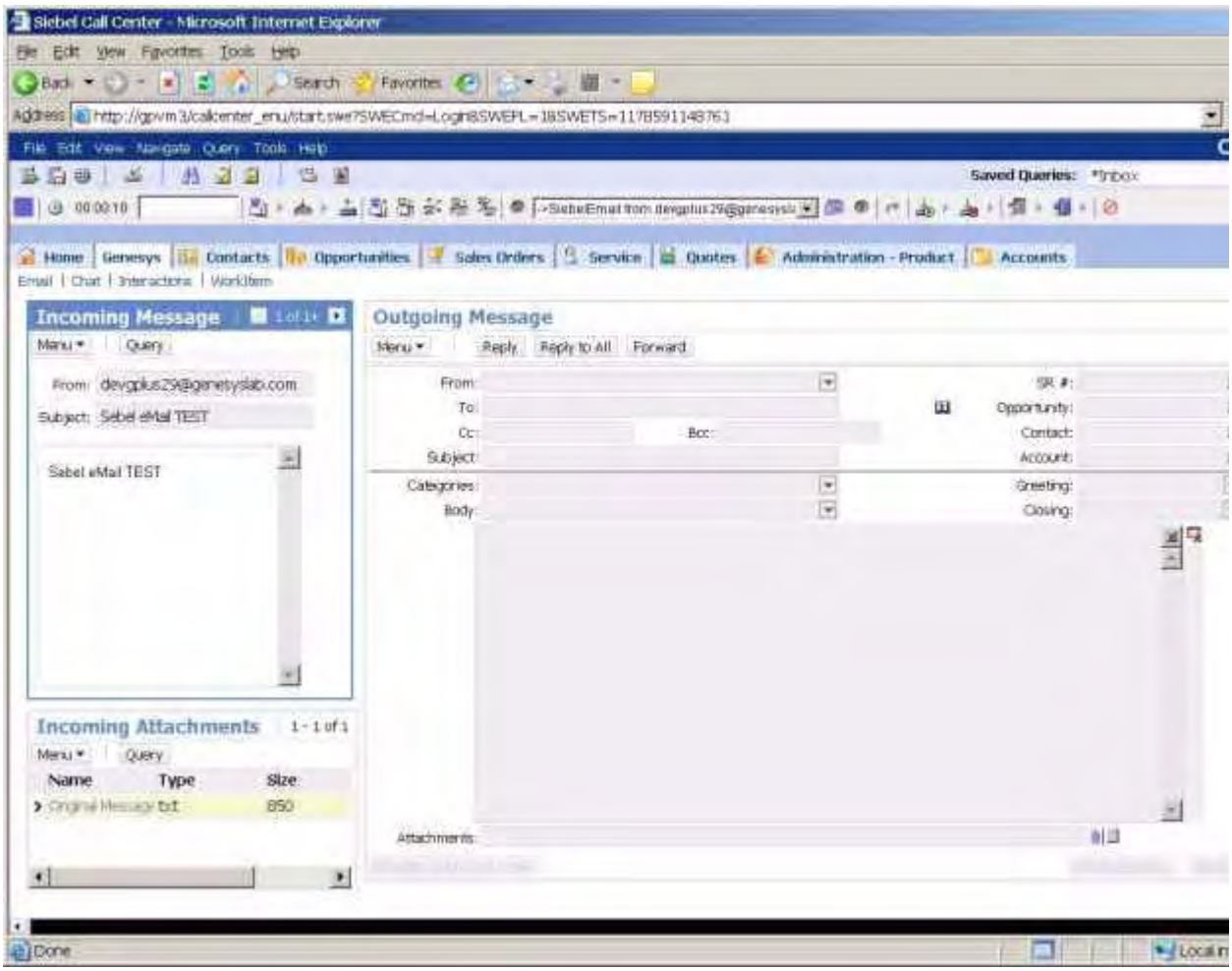

Figure 43: Siebel eMail Interaction

The View for Siebel eMail is a default, standard Siebel view. In addition to standard buttons, the agent may use toolbar buttons to release and transfer a Siebel eMail interaction.

To transfer a Siebel eMail interaction:

- Click a Transfer button as shown in Figure 44.

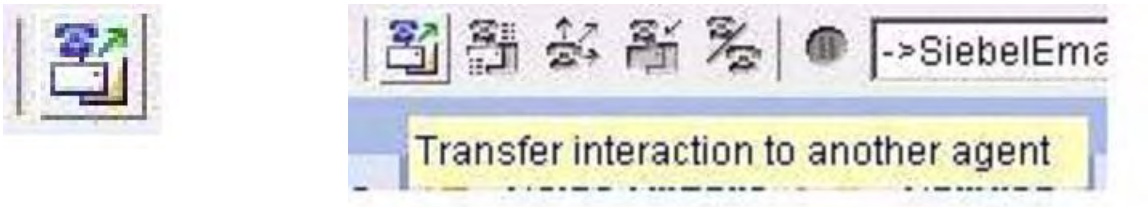

Figure 44: Transfer Button

After you click the Transfer button, a popup window with agents list will appear. You may choose an agent to transfer to and click OK, or switch to

a queue transferring window by clicking the Transfer to Agent button on the popup window. Refer to Figure 35 and Figure 36 on page 71.

For instructions on how to pull an interaction or to cancel a route request to stop its processing, please consult with your Siebel Administrator, as this functionality is a required customer site customization.

Working with Background E-Mail

To view background e-mails, click the Genesys view tab and select the Email Folders view. You will see a list of interactions as shown in Figure 45 on page 78. Select an interaction and click the `Open` button. The view with the selected e-mail interaction will open, and you can work with it as with ordinary e-mail.

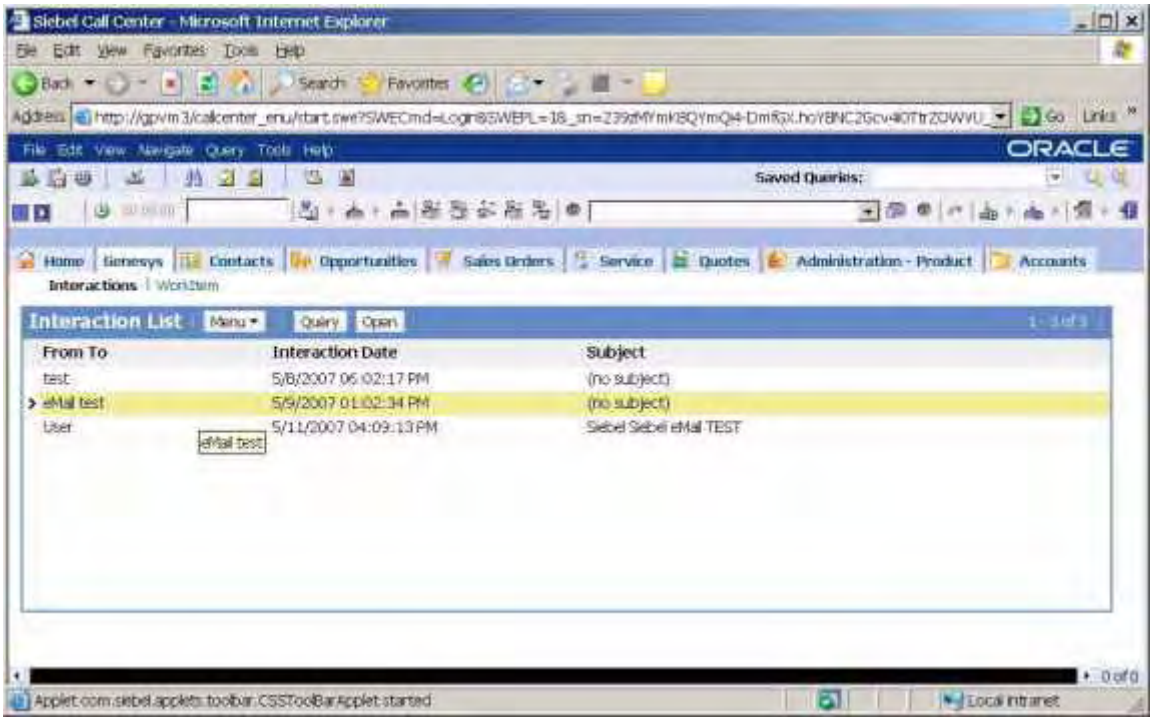

Figure 45: Background Interactions

Logging Out

To log out, after you have finished with a call, follow these steps:

1. Click the Not Ready button.

   This will put you in the Not Ready mode, and no interactions will be sent to you.

2. Select a Not Ready reason code.

You see the estimated time of your logout if you are working in Predictive Dialing mode.

Your administrator can set the Logout control LogOutControl option in the `.def` file to `true` to enable this estimated logout time functionality in Predictive Dialing mode. For more information about the LogOutControl option, see the *G*plus *Adapter 7.5 for Siebel CRM Deployment Guide.*

Note: If you are assigned to take outbound calls, you cannot log out if Outbound Contact Server has already requested a dialer to make an outbound call.

3. If you are in the DND (Do Not Disturb) state, please change your DND status before logging out.

Avoid logging out while in DND status. If you are in DND status and log out from Siebel CRM, when you log in to Siebel7 again you may still be in DND state but the Do Not Disturb button may indicate that you are not.

Note: Ask your system administrator or supervisor to recommend a procedure for cancelling DND if the button doesn't reflect your actual state.

Automatic Log Out in Predictive Dialing Mode

Automatic log out occurs under the following circumstances:

- If your estimated time expires.
- If the outbound call is processed.

In Case of Unsuccessful Log Out

If you receive an unsuccessful log out message, you are provided with a reason. In this scenario, contact your supervisor or system administrator and provide him or her with the reason you received.

Chapter

4 Administrator's Information

This chapter includes information for administrator's of the G*plus* Adapter for Siebel CRM.

Chapter sections are as follows:

- Features for Administrators, page 81
- Logging In, page 82
- Accessing Communications Administration Functions, page 82
- Creating a Genesys Configuration, page 83
- Adding Agents to a Profile, page 86
- Editing Agent Information, page 88
- Configuration Synchronization Enhancement, page 98
- Genesys Agent's Employee ID Mapping, page 100
- E-Mail Routing, page 101
- Synchronization of E-mail Content Between Genesys Universal Contact Server and Siebel, page 102
- Genesys E-Mail Activity Creation, page 102
- Genesys Chat Activity Creation, page 103
- Starting the Configuration Synchronization Component, page 105
- Starting the Campaign Synchronization Component, page 107
- Regular and Compatibility Modes, page 115

Features for Administrators

Here are the major features for administrators provided by the G*plus* Adapter for Siebel CRM:

- A single, consistent user interface for customer relationship management, telephony control, server administration, and contact center configuration.

- The support for a wide range of telephony hardware. Contact Genesys for a list of fully tested switch configurations.
- The support for typical inbound, outbound, and internal call scenarios. Sample configurations are provided to help each business to more rapidly produce the most appropriate configuration for its business needs.
- The ability to administer all agent and telephony configuration through Siebel Administration screens, which is discussed next.

Logging In

The Administrator logs into Siebel Server in the same way the agent does (see "Logging Into the Siebel Server" on page 38).

Accessing Communications Administration Functions

To access Communications Administration functions:

1. Using the Siebel Communications menu, select `View` > `Site Map`.

   Administration functions will be accessed by selecting the links on the screen that appears. See Figure 46 on page 83.

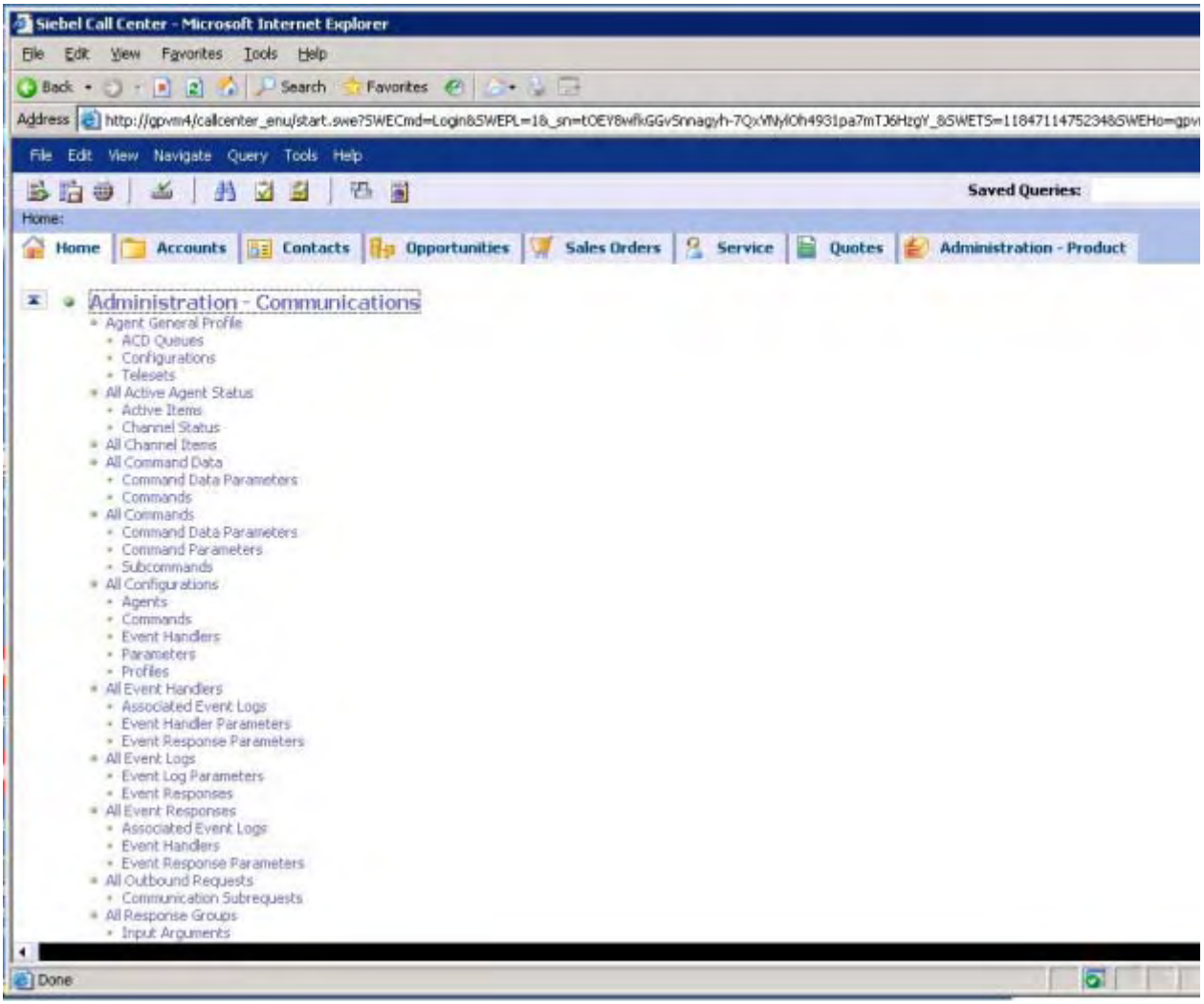

Figure 46: Siebel Public Sector Call Center, Home Tab

Creating a Genesys Configuration

To configure the G*plus* Voice Component by applying a Profile:

1. Select `All Configurations` as shown in Figure 46.
   This action brings up a list of configurations.
2. Select `Genesys`. Figure 47 on page 84 shows the Genesys Configuration selected.

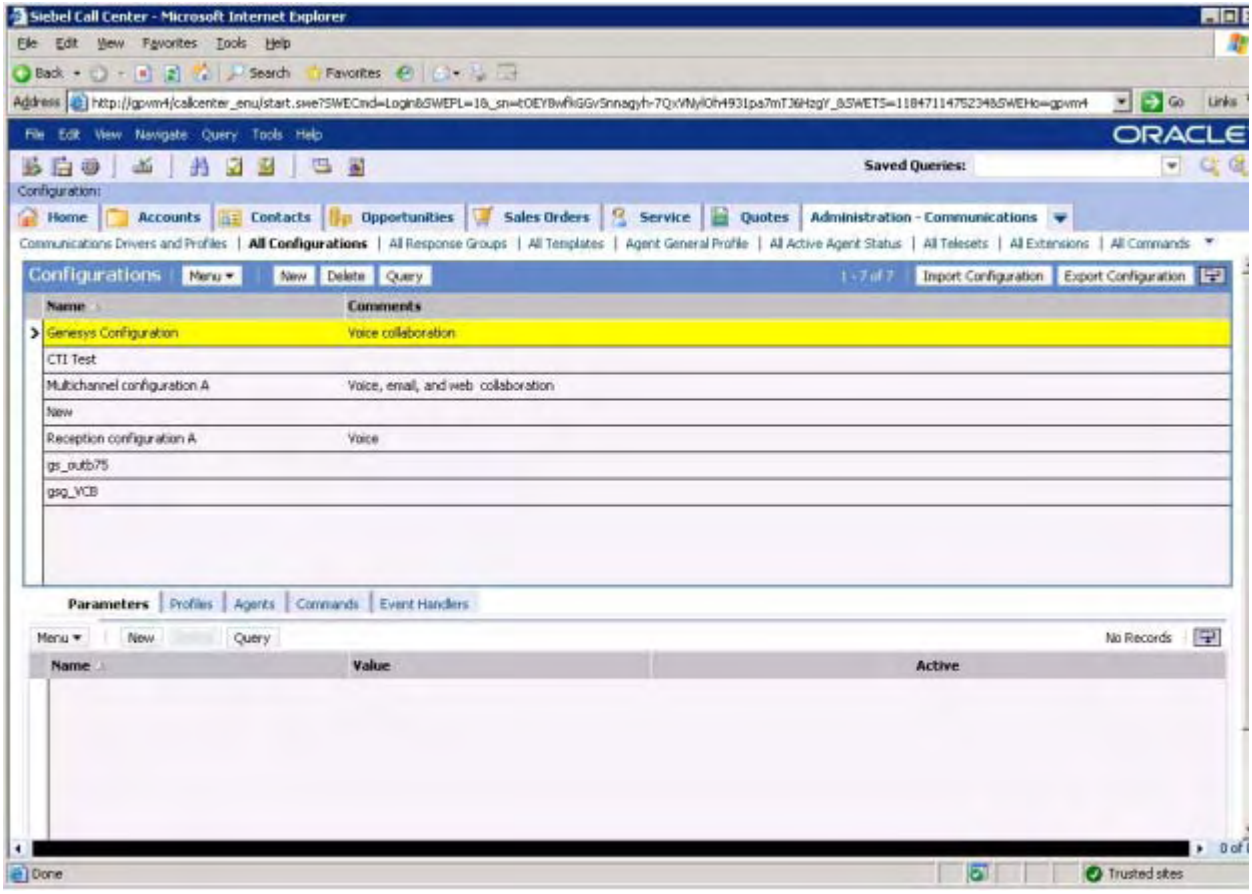

Figure 47: Siebel Public Sector Call Center, All Configurations

To apply a Profile to the G*plus* Voice Component:

1. Click the Profiles tab in the lower frame in Figure 47.
2. Click `New` on the Profiles applet.
3. Select `Add Communication Profile`.
4. Select the Genesys Profile (see Figure 48).
5. Click OK as shown in Figure 48.
   The Genesys Profile, Gplus Voice driver, appears in the Profiles tab in the lower portion of the page (see Figure 49 on page 85).

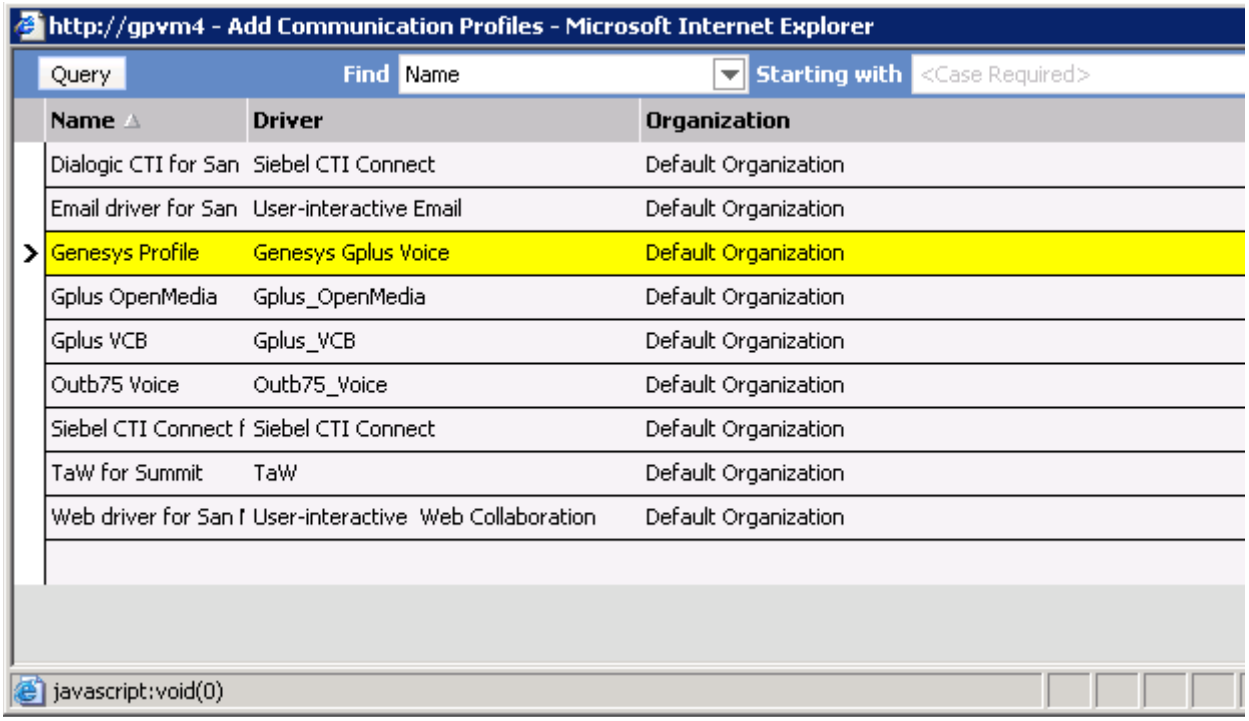

Figure 48: Add Communication Profiles, Genesys Profile Selected

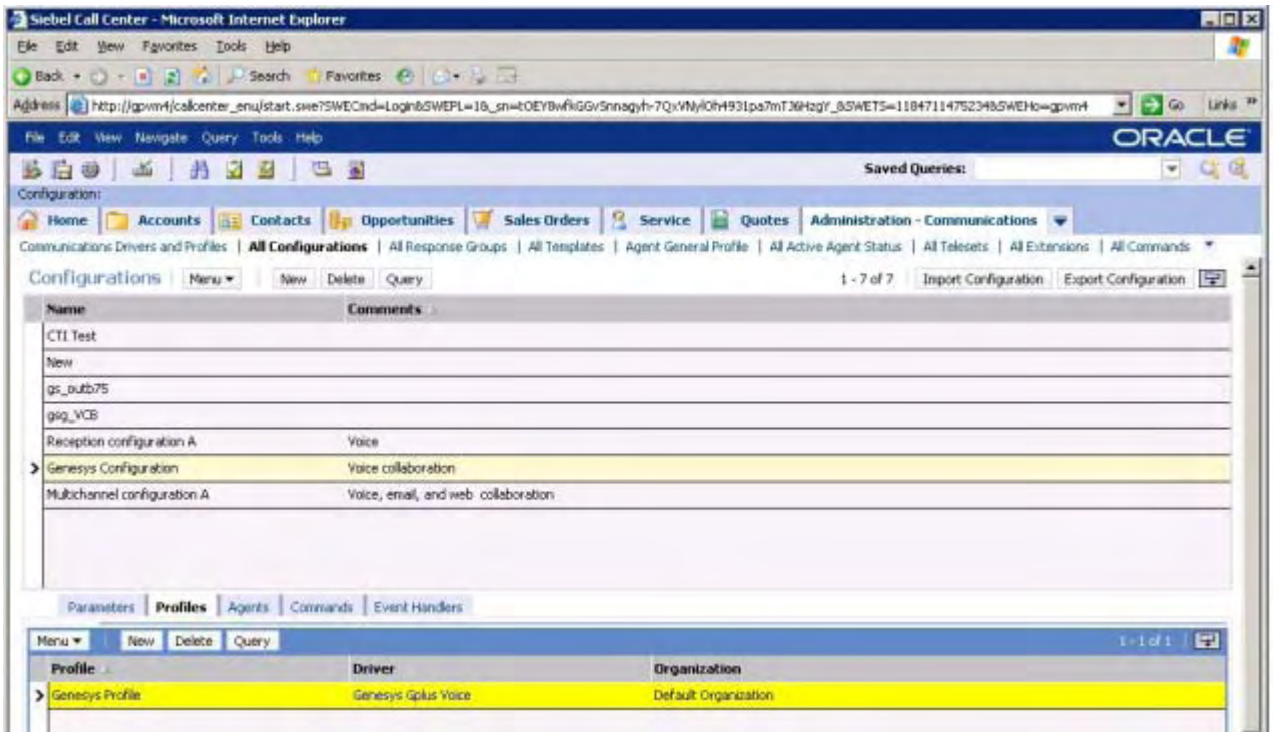

Figure 49: Genesys Profile, Gplus Voice Driver, in Profiles Tab

Adding Agents to a Profile

At this point, agents can be associated with the Genesys Profile.

To start adding agents to a profile:

1. Click the Agents as shown in Figure 49.
   The Agents tab displays (see Figure 50).

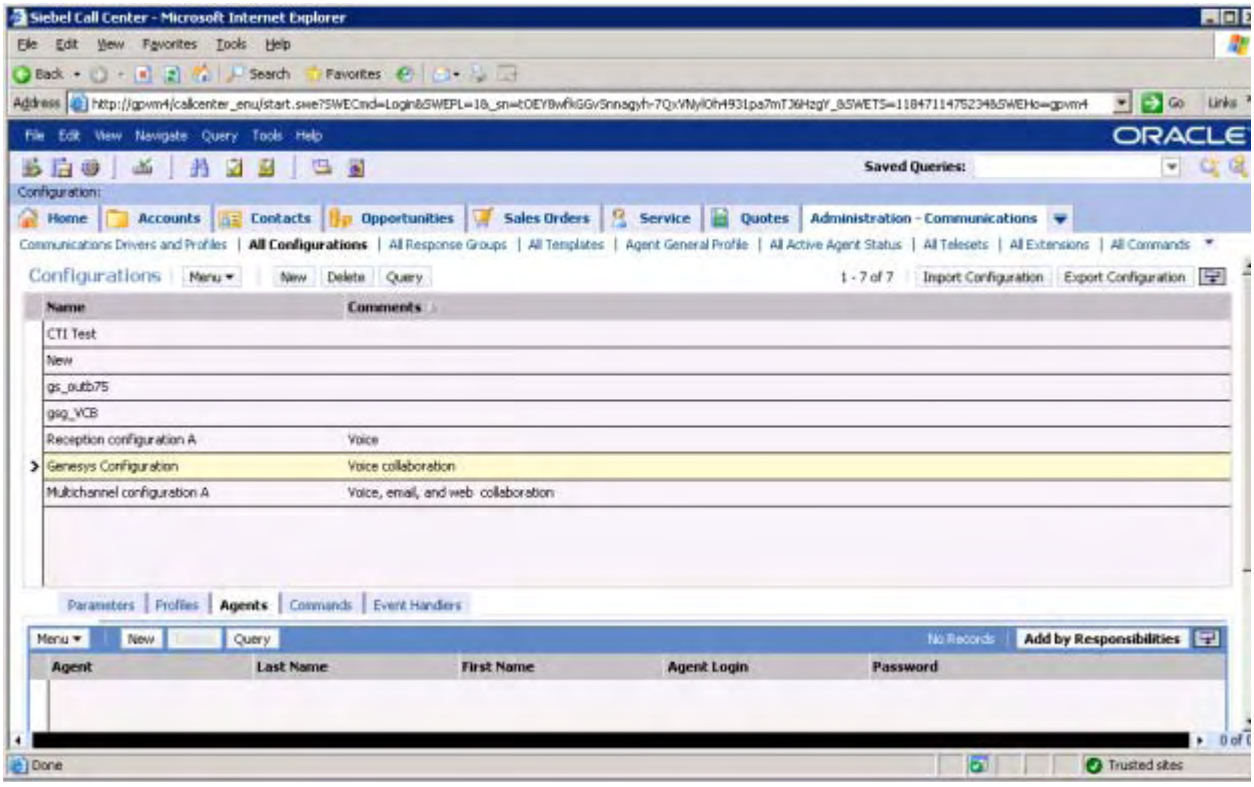

Figure 50: Agents Tab

To bring up available agents (from either the Genesys or Siebel database):

1. Click the down arrow and select `Add Agents`.
   The resulting dialog box shows all available agents that can be selected
2. Select the agents to add to the Genesys Profile for G*plus* Voice (see Figure 51).

Figure 51: Add Agents Dialog Box

3. Clicking OK as shown in Figure 51.
   The selected agents appear in the Agents tab in the lower portion of the page (see Figure 52).

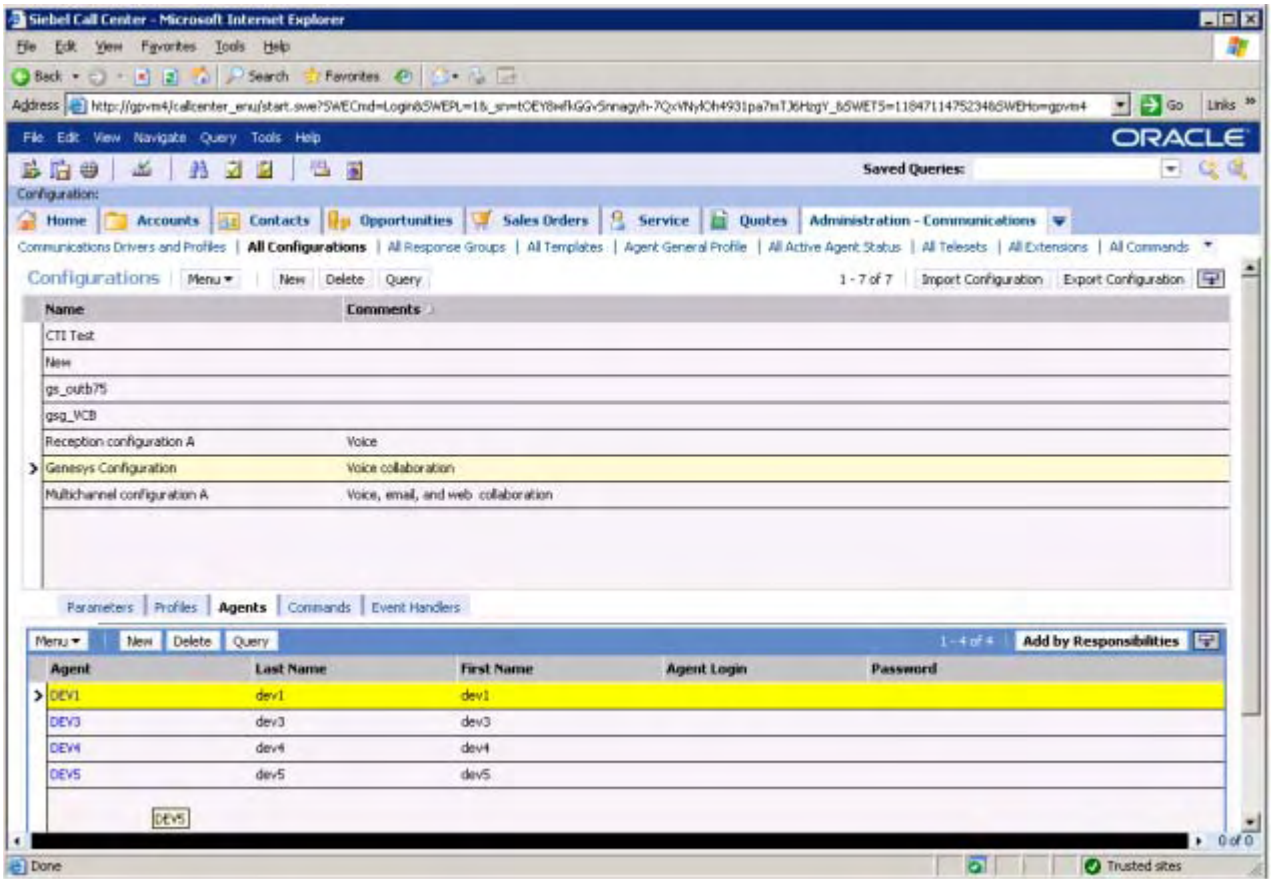

Figure 52: Agents Added to Genesys Configuration

4. Edit agent information, if necessary.

Editing Agent Information

To assign a Login ID to an agent:

1. Select the Agent General Profile shown in Figure 52.

   The Agent General Profile tab is displayed at the top of the page. See Figure 50 on page 86.

2. Edit agent login information.

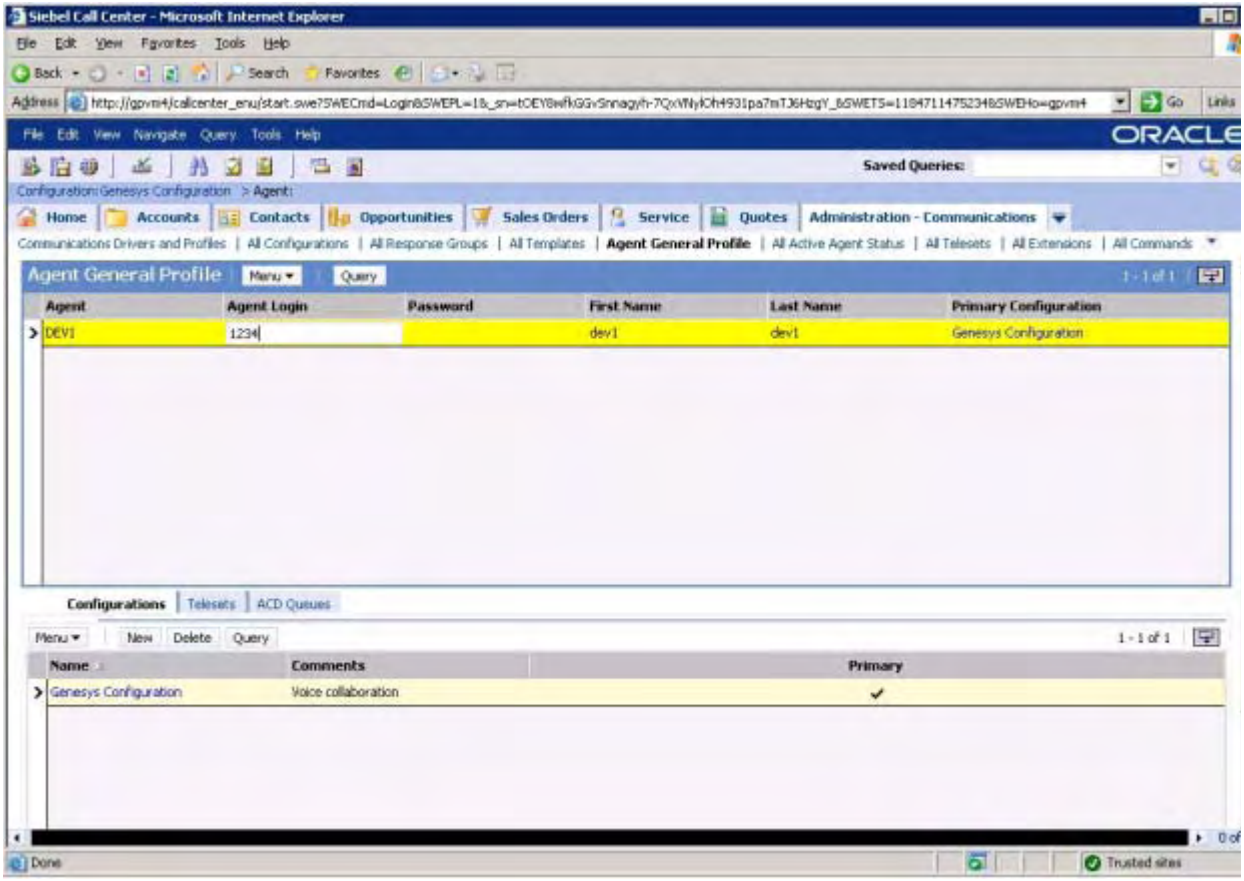

Figure 53: Agent General Profile

To assign the selected agent to a Siebel Teleset, which is the equivalent of Genesys Agent Place:

1. Click the Telesets tab shown in Figure 53.

   The Telesets tab displays, see Figure 54 on page 89.

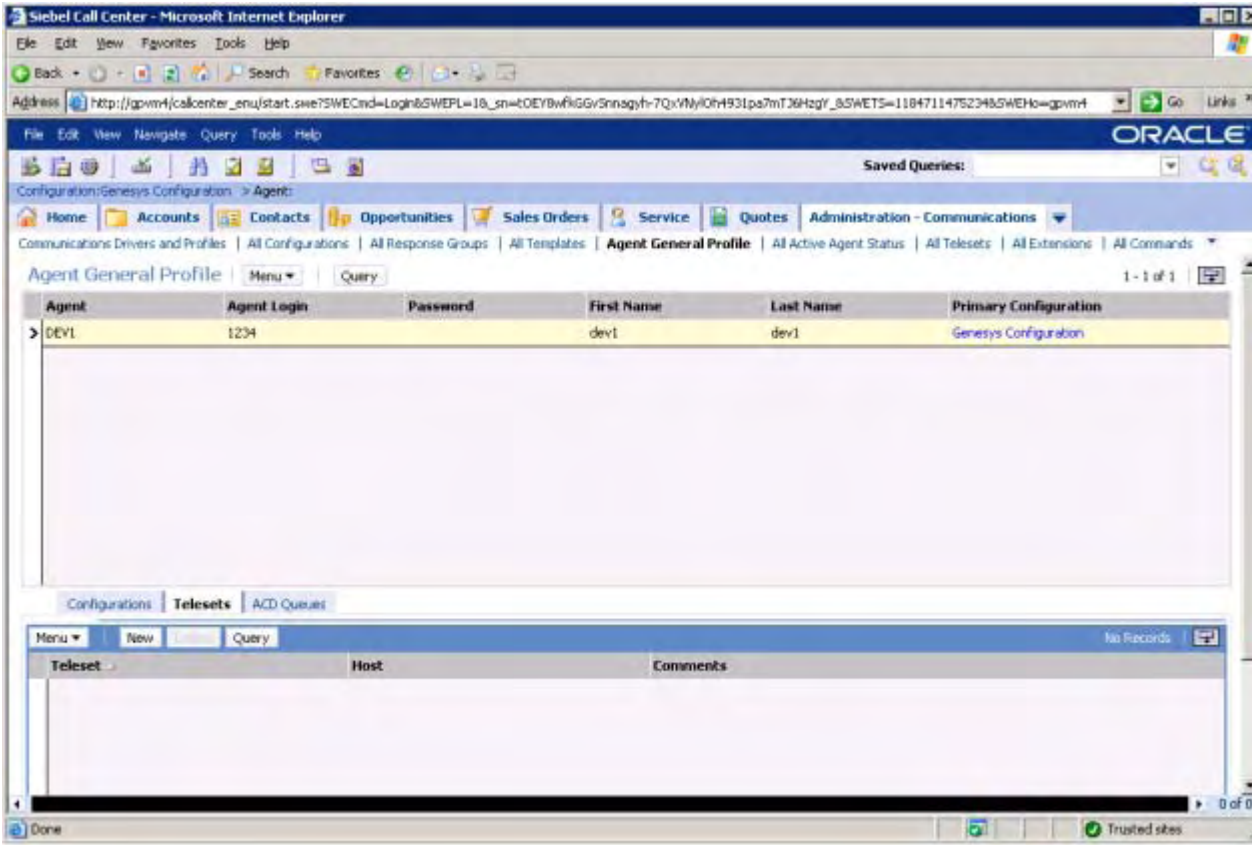

Figure 54: Agent General Profile, Telesets Tab

2. Click the Query button in the Telesets tab.
   The dialog box is displayed.
3. Click the down arrow and select `Telesets`.

   The telesets dialog box displays the available telesets for selection and assignment to the agent. See Figure 52 on page 87.

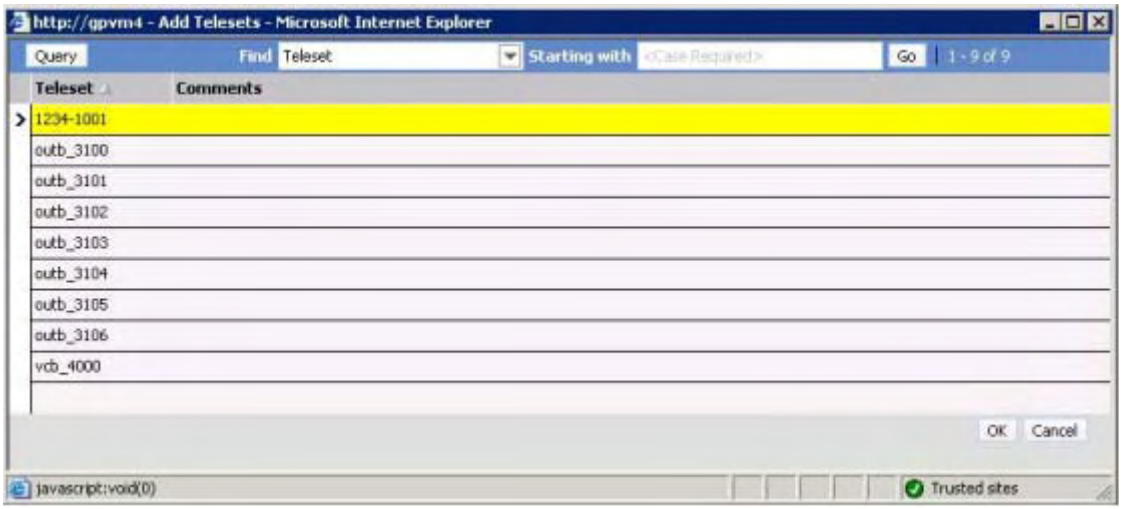

Figure 55: Add Telesets, Query Results

4. Click `OK`.
   In the dialog box shown in Figure 55, the teleset is assigned to the agent (see Figure 56 on page 90).

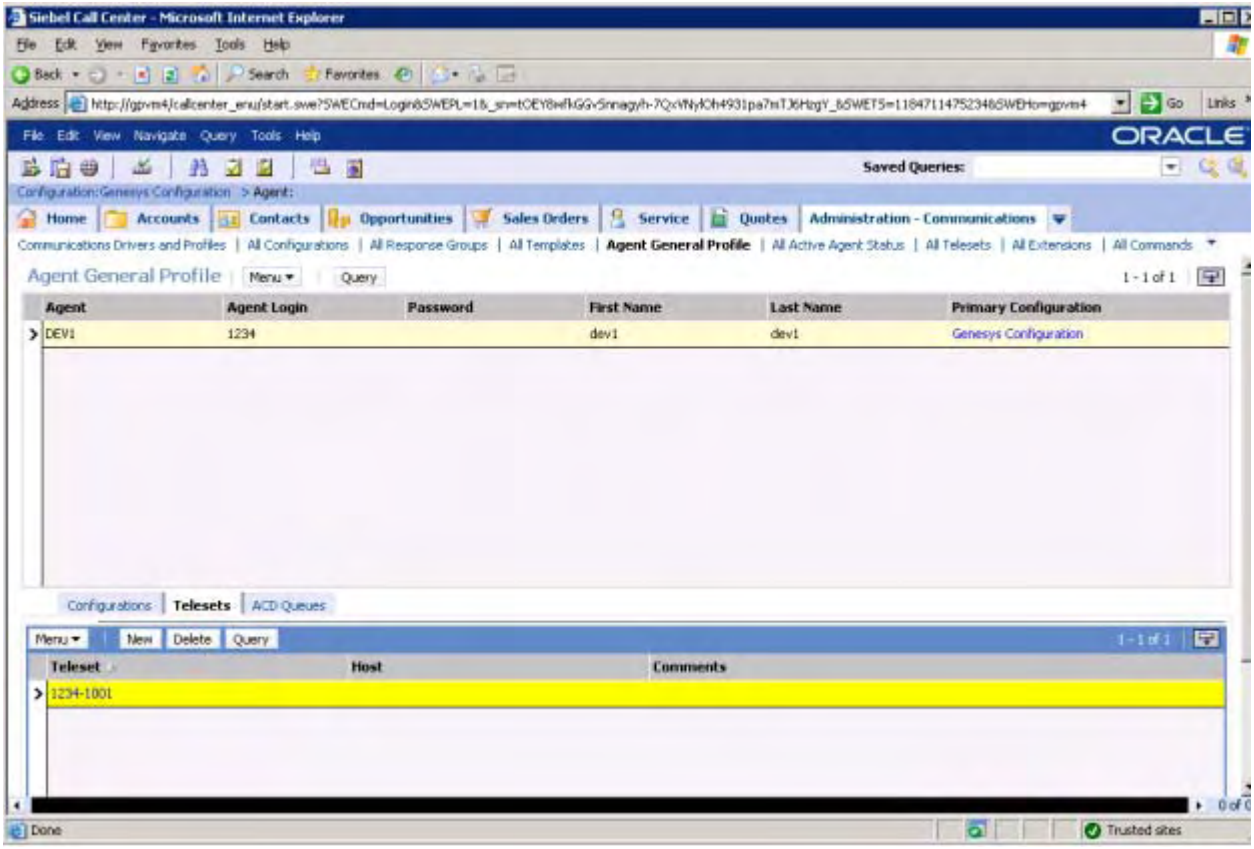

Figure 56: Teleset Assigned to Agent

Note: All information entered is updated in the Siebel database and synchronized with the Genesys Configuration database.

The same general procedure for assigning agents to telesets also applies to assigning agents to ACD queues.

Configuring the Not Ready Command

The `Not Ready` Device command can display as a button on the Siebel Communications Toolbar for the following Adapter Components: Voice, Siebel E-mail, and Multimedia. This button displays based on configuration of the `.def` file for the following two Define Switch Type and define T-Server Host Port. If the switch does not support this functionality, the button will not be available. This feature allows the agent to change the work mode by clicking the Not Ready button.

This functionality is provided by the sample configuration and defined by the `GenComm_universal.def` file. The use of the existing component in the Siebel CRM Business Component List Of Values is used to define the set of allowed work modes and reason codes to be sent with Device command Not Ready.

When an agent makes himself Not Ready, the Siebel CRM pop-up Applet `Transfer Multiple LOV Popup Applet` shows the popup window with the set of possible values for AgentWorkMode and ReasonCode for AgentWorkMode. An agent selects the appropriate values from the list of options and then select `OK`.

The system administrator must set the possible values for AgentWorkMode and ReasonCode parameters in Siebel CRM.

The agent can select more than one value for AgentWorkMode and more than one value for ReasonCode parameters in the popup view. In this case only one value for both AgentWorkMode and ReasonCode will be accepted by the Adapter, but it cannot be predicted which values will be chosen.

If any value for the ReasonCode parameter is not chosen when the pop-up window displays, then the default value (-1) will be used for the Reason Code.

If any value for the ReasonCode parameters is not chosen on the pop-up view, then the Adapter looks for the value defined by the `Service:AgentWorkMode` parameter. If the value of this parameter is defined, the Adapter uses it, otherwise the default value (0, AgentWorkModeUnknown) is used as the AgentWorkMode value. See the *G*plus *Adapter 7.5 for Siebel CRM Deployment Guide* for more information about this feature.

Synchronizing Siebel Extensions and ACD Queues with Genesys Configuration

The association between a Siebel Communications Configuration and its corresponding switches is created through the Communications Driver Profiles, which are included in the Siebel Configuration.

All G*plus* components, except Synchronization Servers, use Communications Driver Profiles.

The Communications Driver Profiles allow you to override the Siebel Configuration information.

In the Siebel view, the Profile Parameters Overrides area displays the information that was changed based on the Communications Driver Profiles you created.

Communications Driver Profiles of the Genesys Voice Component include the following options for configuring the necessary Siebel information for the association:

- `Driver:TServerAppName`
- `DriverAlias`

> Note: The `DriverAlias` option should have an `@` symbol as the first symbol of the value string.

The `DriverAlias` option is set to be used for association of DNs in telesets with a particular switch in Genesys Configuration Manager through the Communications Driver Profile. For example, extension 7001@Switch1 in the teleset means extension 7001 is associated with a switch referenced by the parameter `Driver:TServerAppName` in the Profile, where `DriverAlias = "@Switch1"`.

The Siebel Extensions, ACD Queues, and Agent Logins are synchronized in the Genesys Configuration Management Environment (CME) under the Switch that is described by its corresponding Siebel Communications Server Driver parameter for Genesys Voice (`Channel Type = Voice`):

- `Driver:TServerAppName` - the name of the T-Server application in the Genesys Configuration Manager.

> Note: Customers who used previous versions of the Adapter and do *not* require the new functionality of the Genesys Voice Component (see the "Voice" section under "New in This Release (7.5)" in Chapter 4 "Administrator's Information"), may still use the `ServerHost` and `ServerPort` parameters described below.
> Do *not* change the `TServerAppName = "CHANGE_ME"` parameter in this case. If `TServerAppName` is defined, then `ServerHost` and `ServerPort` parameters are ignored.

- `Driver:ServerHost` - the host name of the machine where T-Server is running
- `Driver:ServerPort` - the port number for T-Server in decimal form.

Make sure that values of these Driver parameters are unique in your Genesys CME. Do not use more then one T-Server application with same Host/Port combination.

Note: The Siebel Extensions and ACD Queues which correspond to the Genesys Open Media configuration only (those that do *not* correspond to the Genesys Voice configuration) are not synchronized with the Genesys environment.

The Siebel Extensions and ACD Queues Export/Synchronization Rule

A Siebel Configuration may include multiple Adapter Profiles and can therefore be associated with multiple switches. The following list provides the guidelines of the possible combinations:

An agent can be associated with:

- One or more Telesets
- Multiple Adapter Profiles
- Multiple Switches (through Adapter Profiles)

An agent's Teleset can be associated with:

- Multiple Extensions

You must configure the option DriverAlias to associate ACD Queues and Extensions with the proper switches. Use the following syntax to configure the Siebel Extensions and ACD Queues:

```
full_extension_name = <actual_extension_name>[driver_alias]
```

where:

- `actual_extension_name` is a string representing the actual extension or ACD Queue value that will be used in any communication interactions.
- driver_alias = @<any_string>

The Siebel Extensions/ACD Queues will be exported into and synchronized with the Configuration Layer based on the information provided in the syntax above. When creating this configuration syntax, you must follow these rules.

An `actual_extension_name` will be exported into and synchronized with Configuration Manager under the Switch that is described by its corresponding:

- `Driver:TServerAppName`

- `DriverAlias` option of the Adapter Profile has the same value as `driver_alias` substring from the full Extension/ACD Queue name (`full_extension_name`).

See Figure 57 on page 94 for an illustration of the following example:

A Siebel Agent, `Agent01`, is included in the Siebel configuration `Conf01`. The Siebel configuration `Conf01`, has two Adapter Profiles: `Prof01` and `Prof02`. The Adapter Profile, `Prof01`, includes the switch `Switch01`. The Adapter Profile, `Prof02`, includes the switch `Switch02`. In this example, the following options define the associated switch for the Siebel configuration `Conf01`:

For `Switch01` in the `Prof01`:

```
Driver:TServerAppName = "TServer1"
DriverAlias = "@v01"
```

For `Switch02` in the `Prof02`:

```
Driver:TServerAppName = "TServer2"
DriverAlias = "@v02"
```

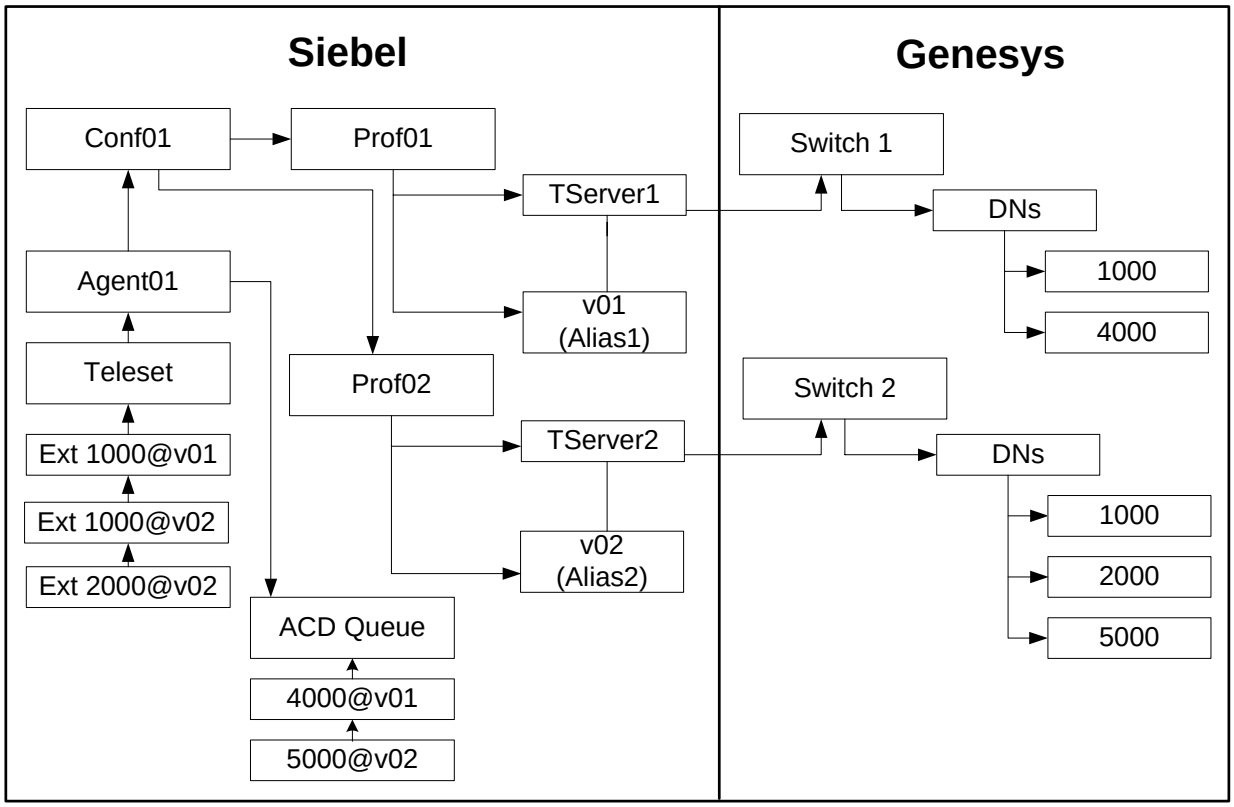

Figure 57: Example of Siebel Export/Synchronization with Genesys

If the agent named `Agent01` has a Teleset `Place01` that contains three Extensions: `1000@v01`, `2000@v02`, and 3000.

And the agent also has three ACD Queues: `4000@v01`, `5000@v02`, and 6000.

Then, only the following actual_extension_names of the Extensions and ACD Queues described above will be exported into and synchronized with Configuration Manager:

under Switch01: 1000, 4000

under Switch02: 2000, 5000

Notice that Extension 3000 and ACD Queue 6000 will not be exported, because Conf01 does not have an Adapter Profile with an empty value of the DriverAlias option.

For example: Extension 3000 should be formatted:

- 3000@v01 (to associate it with Adapter Profile01) or
- 3000@v02 (to associate it with Adapter Profile02).

Normally the Configuration Synchronization Component exports 'A' extensions (Siebel) as ACD Positions (Genesys) and 'S' extensions (Siebel) as Extensions (Genesys). However, in the case when teleset has no 'A' extensions (Siebel), it will be exported as ACD Position (Genesys) by default. This conversion has been implemented because some types of switches require at least one ACD Position for each Agent Place in the Genesys environment. The user property ConvertExt2ACD allows disabling of this conversion. Change the value of ConvertExt2ACD to false if your environment does not have such switches. Please see "Setting Default Field Values for Designated Genesys Objects" on page 98 for more information.

Synchronizing a Siebel Employee/Agent with Genesys Configuration Environment

Before exporting an agent from Siebel to Genesys (by associating the agent with a Communications Configuration, which is based on the Voice Component), make sure that the agent belongs to the correct Organization in the Siebel environment. You can check or change the assignment using the User Administration > Employees screen of the Siebel Web Client. To export the agent successfully, the agent's Organization must be mapped to a Genesys Tenant in the options of the Configuration Synchronization Component application in the Genesys Configuration Layer.

After exporting an agent whose Organization in Siebel is mapped to a Tenant in Genesys, if you want to reassign the agent to a different Siebel Organization, do not change the agent's Organization using the User Administration > Employees screen right away. Instead, follow these steps in the Siebel Web Client:

1. Delete the agent from all Communications Configurations, which are based on the Voice Component.
2. Go to the User Administration > Employees screen and assign the agent to a different Organization. Make sure that the new Organization is mapped to a Genesys Tenant in the options of the Configuration Synchronization Component application in the Genesys Configuration Layer.

3. Assign the agent back to the Communications Configurations described in Step 1.

In order for Siebel Agents' Skill and Skill Item names to be compliant with the Genesys Universal Router, make sure that these names in Siebel meet the following requirements:

1. A name can include any of the following characters:
   - Alphanumeric characters
   - Hyphens (-)
   - Spaces
   - Underscores (_)
2. A name cannot begin with a number.

Note: The user is responsible for any voluntary changes made to the data in Configuration Manager folders where G*plus* Adapter for Siebel CRM Configuration Synchronization Component stores agent data. Such changes may cause data synchronization scenarios to fail, and, as a result, there might be discrepancies between configuration data in Siebel and Genesys applications.

Siebel Skill Mapping

When you create an agent skill, follow the standards in Table 2 to establish your skill mapping. For additional information, see Siebel documentation.

Table 2: Siebel Skill Mapping

Siebel Skill Elements	Genesys Mapping Substrings
Skill item separator	_SI_
dash (-)	_D_
space ( )	_S_
High Char 1	_HC1_
High Char 2	_HC2_
High Char 3	_HC3_
High Char 4	_HC4_
High Char 5	_HC5_
High Char 6	_HC6_

Table 2: Siebel Skill Mapping (Continued)

Siebel Skill Elements	Genesys Mapping Substrings
High Char 7	_HC7_
High Char 8	_HC8_
Low Char1	_LC1_
Low Char2	_LC2_
Low Char3	_LC3
Low Char4	_LC4_
Low Char5	_LC5_
Low Char6	_LC6_
Low Char7	_LC7_
Low Char8	_LC8_
High Number 1	_HN1_
High Number 2	_HN2_
High Number 3	_HN3_
High Number 4	_HN4_
High Number 5	_HN5_
High Number 6	_HN6_
High Number 7	_HN7_
High Number 8	_HN8_
Low Number 1	_LN1_
Low Number 2	_LN2_
Low Number 3	_LN3_
Low Number 4	_LN4_

Table 2: Siebel Skill Mapping (Continued)

Siebel Skill Elements	Genesys Mapping Substrings
Low Number 5	_LN5_
Low Number 6	_LN6_
Low Number 7	_LN7_
Low Number 8	_LN8_

A Siebel Employee's Assignment Skill consists of three items:

- Skill
- Skill Item
- Skill Item Expertise

When a Siebel Employee is exported and synchronized into Configuration Manager, information about the agent's skills is also exported into Siebel. The table below shows how the information is transferred from the Siebel environment into the Genesys Configuration Environment. Note in particular:

- An agent's Skill and Skill Items are concatenated in one string with a "_SI_" substring as the separator. The resulting string is exported into the Skills folder of Genesys Configuration Environment.
- An agent's Siebel Skill Item corresponds to the Genesys Skill Level in the Genesys Configuration Environment as described below:

Siebel Skill Item Expertise	Genesys Agent Skill Level
Novice	1
Intermediate	2
Expert	3

Configuration Synchronization Enhancement

Setting Default Field Values for Designated Genesys Objects

The Configuration Synchronization component allows customers to define and modify the fields that will be synchronized (exported) from Siebel to Genesys. Configuration Synchronization exposes all Configuration Manager (CME) properties for the Genesys objects that are designated to be synchronized

through the G*plus* Adapter integration. This allows a customer to specify which fields will be synchronized.

If no Siebel field exists for a specific CME field or property, then the G*plus* Adapter does not synchronize this field.

The example below describes how to set up default values to be assigned to the specified fields of the Genesys objects during synchronization process. For the following example, assume that it is necessary to assign the following default values to selected fields of the Agent Login and DN Genesys objects during export from Siebel to Genesys:

```
Agent Login's
    wrap-up-time = 30;
    Switch-specific Type = 5;
    Use Override = False;
DN's
    Switch-specific Type = 5;
    State Enabled = False;
    Route Type = Label.
```

To do this, it is necessary to change the Siebel repository using the Siebel Tools application.

After importing the `GenesysConfigSynchronization.sif` file (as described in the *G*plus *Adapter 7.5 for Siebel CRM Deployment Guide*, in Chapter 3, "Configuration and Installation of the Configuration Synchronization Component", it is possible to set up the default values provided above. Use the following steps:

1. In Siebel Tools, navigate to `Object Explorer > Types`. Then go to Siebel `Objects\Business Service` folder.
2. Select the `Genesys Config Synchronization` record on the Business Services applet.
3. With the `Genesys Config Synchronization` Business Service selected, navigate to `Business Service User Prop` folder. To make this folder visible in Object Explorer, select it in the Object Explorer tab of Development Tools Options (`View > Options`).
4. The Business Service User Props applet displays a number of properties with the names resembling the names of corresponding Genesys fields.
5. Set the default values for the Business Service User Properties as shown below:

```
DefaultAgentLoginWrapupTime (Name) = 30 (Value);
DefaultAgentLoginSwitchSpecificType = 5;
DefaultAgentLoginUseOverride = 1;

DefaultDnSwitchSpecificType = 5;
DefaultDnState = 2;
DefaultDnRouteType = 2.
```

6. Compile a new Siebel Repository File for Locked projects and deploy it in Siebel server, or, if you have not yet finished with the deployment, continue with the deployment of the Configuration Synchronization Component.

Genesys Agent's Employee ID Mapping

Changing the Default Mapping

By default the Siebel Agent Login field maps to the Genesys agent's Employee ID. This is required for Genesys Open Media functionality.

For customers who do not use Genesys Open Media, the Configuration Synchronization Component allows you to select which Siebel field to map to the Genesys `Employee ID` field of the exported agent. The following Siebel fields could be synchronized with the Genesys agent `Employee ID` field:

- `Agent Login (default)`
- `Row ID`
- `User ID`
- `<custom field>`

The following example describes how to map these fields (`Row ID`, `User ID`, or `<custom field>`) to the Genesys `Employee ID` field of the exported agents. To perform this task, it is necessary to change the Siebel repository using Siebel Tools application.

After importing the `GenesysConfigSynchronization.sif` file (as described in the *G*plus *Adapter 7.5 for Siebel CRM Deployment Guide*, in Chapter 3, "Configuration and Installation of the Configuration Synchronization Component", it is possible to change the default mapping of the Genesys `Employee ID`, as follows:

1. In Siebel Tools, navigate to `Object Explorer > Types`. Then go to the `Siebel Objects\Integration Object` folder.
2. Select the `Genesys Agent` record on the `Integration Objects` applet.
3. With the `Genesys Agent` Integration Object selected, navigate to the Integration Component folder. To make the Integration Component folder visible in Object Explorer, select it in Object Explorer tab of Development Tools Options (`View > Options`).
4. Select the `Genesys Users / Organizations` record on Integration Components applet.
5. With `Genesys Users / Organizations` Integration Component selected, navigate to Integration Component Field folder.
6. The Integration Component Fields applet displays a number of fields. Select the record with the Name = `EmployeeId`.

7. By default for this record, `External Name = AgentLoginId`. This maps the Genesys agent's `Employee ID` to the Siebel Agent Login.
8. Set `External Name = SiebelEmplRowId`. This maps the Genesys agent's `Employee ID` to the Siebel employee's `Row ID`, or

   Set `External Name = EmployeeID`. This maps the Genesys agent's `Employee ID` to the Siebel employee's `User ID`, or

   Set `External Name = <custom field>`. This maps the Genesys agent's `Employee ID` to the Siebel employee's `<custom field>`.
9. Compile the new Siebel Repository File for Locked projects and deploy it in Siebel server, or if you have not yet finished the deployment, continue with the deployment of the Configuration Synchronization Component.

E-Mail Routing

G*plus* Adapter for Siebel CRM enables Genesys routing of Siebel eMail:

1. Genesys Universal Router queues inbound Siebel eMails:
   - E-mails are received from the corporate e-mail server and processed via Siebel eMail Response workflows.
   - E-mails are passed to Siebel Smart Answer for context analysis and auto response, if appropriate; otherwise e-mail is passed to Genesys for routing.
   - Genesys Universal Router Business Service attaches the Siebel eMail activity ID and other key data to a component that issues a route request to Genesys Universal Queue.
2. Genesys Universal Routing Server (URS) pushes the e-mails to Siebel agents via the Siebel Communications Toolbar's e-mail channel.
   - Routing strategies in URS identify a target agent.
   - Interaction Server sends an invitation event to an agent.
   - Siebel delivers the e-mail. The interaction is pushed to the agent via the G*plus* Adapter.
   - The agent sees the e-mail message in her Incoming Message panel.
3. Siebel eMail Response processes the e-mail.
   - Siebel event handlers use the passed activity ID to lookup and pop the appropriate Siebel eMail view for processing the agent's reply processing.
   - Siebel outbound workflow processes send the reply out to the corporate e-mail server when the agent is done.
4. The G*plus* Adapter for Siebel CRM updates interaction status in Genesys.

Synchronization of E-mail Content Between Genesys Universal Contact Server and Siebel

The Adapter assumes that Genesys inbound e-mails are immutable. Therefore, inbound e-mails are imported once. On other hand, outbound e-mails can be changed externally, when they are not handled by the Adapter. Therefore, after they are delivered to the Siebel agent, the Adapter will import or update the content of the e-mail into Siebel.

However, due to system limitation on the size of the Email Body field of the Action record in Siebel, other applications (if any are involved) should take care to keep the size of the outbound e-mail body below 16,008 bytes. Please note that it is still possible to receive inbound e-mails with a body size greater then this limit. In such a case, the Adapter will preserve the unmodified body as an attachment and then automatically truncate the body to fit within the 16,008 byte limit.

Genesys E-Mail Activity Creation

One Siebel Action (activity) record corresponds to one e-mail interaction. An Activity is created when an interaction is delivered for the first time to the Siebel desktop. Activity status is changed to reflect the current state of handling by an agent.

Inbound e-mails are considered as immutable, and the content of the e-mail (address fields, body, and attachments) is imported only once.

Outbound e-mail can be changed externally, while not be handled by Siebel agents. Therefore, content is imported each time an interaction is delivered to

an agent. The diagram below in Figure 58 shows changes in the activity status for e-mail:

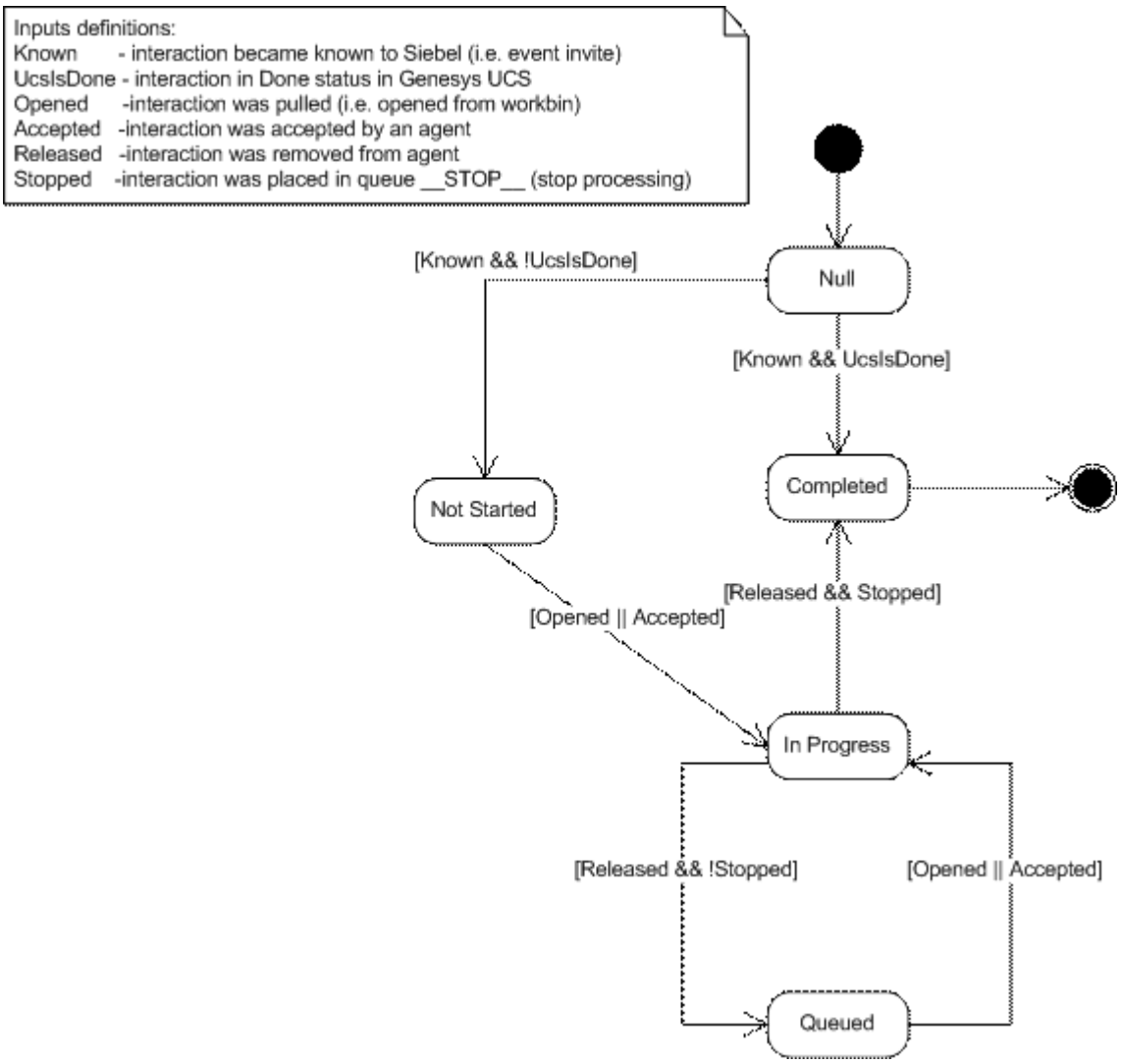

Figure 58: Genesys E-mail Activity Status Diagram

Genesys Chat Activity Creation

A Chat activity is created on event `OpenMediaInvited` in status `Requested`. Upon accepting the chat (upon the first `ChatNewParty` event, which indicates that a chat session is online), status is changed to `In Progress`. Completion of the chat changes the status to `Completed`. The entire chat transcript is stored in a

custom table CX_GEN_ACT_CHAT. The diagram below in Figure 59 shows changes in the activity status for chat:

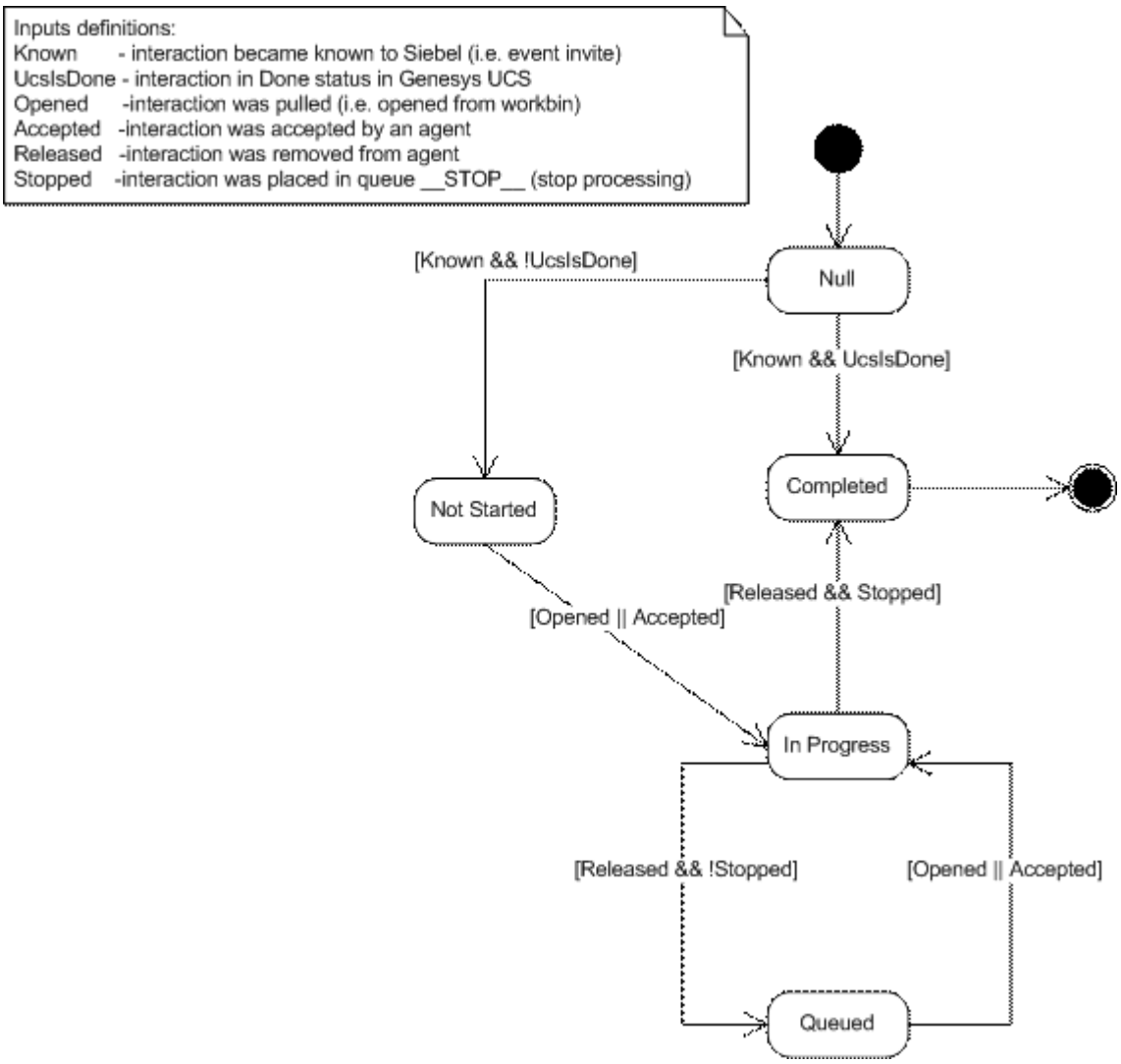

Figure 59: Genesys Chat Activity Status Diagram

Configuring a Chat Transcript

The Genesys Multimedia Solution is able to send a chat transcript to a customer using the Chat Transcript building block in the Genesys Router Designer. This can be accomplished and configured in different ways:

- The Chat transcript is sent to the customer if the agent selects the Send Transcript check box. In this case, the decision to send or not to send is made by the agent.
  - Before Mark Done, the agent selects the Send Transcript check box, and the Adapter sets the interaction attribute Send_Chat_Transcript to Y.

  - Create a routing strategy which checks this attribute, and when it is `Y`, invokes the `Chat Transcript` building block.
  - Change the default value of the `Queue` parameter of the `MarkDoneChat` command in the Siebel CTI configuration from `__STOP__` to `queue`, where the designed strategy is loaded.
- The Chat transcript is always sent to the customer regardless of whether the `Send Transcript` check box is selected.
  - Create a routing strategy which will unconditionally invoke the `Chat Transcript` building block.
  - Change the default value of the `Queue` parameter of the `MarkDoneChat` command in the Siebel CTI configuration from `__STOP__` to the name of the Multimedia queue, where the designed strategy is loaded.
- Disabled, whereby the chat transcript is never sent to the customer. This is the default behavior.
  - In this case, the `MarkDoneChat` command stops interaction processing. Alternatively, if some post processing for chat is required, the interaction is placed in the Multimedia queue for post processing, but post processing does not invoke the `Chat Transcript` building block.

Starting the Configuration Synchronization Component

After the Configuration Synchronization Component has been deployed, it must always be running to ensure that the Genesys environment stays up-to-date with the Siebel environment. Running the Component constantly will prevent error messages in the Siebel Web Client and will guarantee that the Genesys environment reflects the latest configuration updates made in the Siebel environment.

The Configuration Synchronization Component can be started from the command line. The name of the component is listed below:

- `GplusConfSynch.exe` for Windows
- `GplusConfSynch` for UNIX.

The component supports the following command line options:

```
-host <host> -port <port> -app <application> [ -clean_batch |
-batch ]
```

where:

- `host` is the name of the host where the Genesys Configuration Server is running.
- `port` is the port of the Genesys Configuration Server.
- `application` is the name of the Configuration Synchronization Component application.

The `-batch` option should be used to synchronize Siebel and Genesys agent data when the Configuration Synchronization Component is started for the first time. To remove *all* agent data from the Configuration Synchronization Component folders in Configuration Manager and then export agent data from Siebel, use `-clean_batch`.

If you are using Windows, you can also start the Configuration Synchronization Component from the Start menu by going to `Programs` > `Genesys Solutions` > `Gplus Adapter for Siebel CRM` and selecting the component's shortcut (the shortcut has the same name as the Configuration Synchronization Component application object). This will start the component with the default command line options (without `-batch` and `-clean_batch` options).

Note: Before starting the Configuration Synchronization Component with either `-batch` or `-clean_batch` options, you should make sure that all of the latest changes you made in the Siebel Web Client have been saved in the Siebel database. Usually, this can be done by switching to a view different than the one you used to make the last modification.

For `-batch` and `-clean_batch` options to work correctly, different Siebel users should create Configuration Manager objects of the same type under the same Configuration Manager folder. When you use either `-batch` or `-clean_batch` options, the Configuration Synchronization Component uses folder mapping for the Siebel user, specified by the `username` option in the Siebel section of the Configuration Synchronization Component application.

Note: You can use Genesys Management Layer, and specifically the Solution Control Interface, to start or stop or switch between primary and backup Configuration Synchronization Components. If you want to do this, make sure that the Command Line Arguments in the application Start Info tab do not include the `-service` argument.

Note: For the Configuration Synchronization component to work correctly, the following conditions must be met:
1. Profiles within one Communication Configuration can belong to different Siebel Organizations, as long as these Organizations are mapped to different Genesys Tenants.
2. An agent and his/her Communication Configuration Profiles must belong to the same Siebel Organization.
3. A Teleset must not be assigned to agents from different Siebel Organizations.
4. The same extension must not be used in more than one Teleset.

Siebel Extension, ACD Queue, and Agent Login Synchronization

The Siebel Extensions, ACD Queues, and Agent Logins are synchronized in the Genesys Configuration Management Environment (CME) under the Switch that is described by its corresponding Siebel Communications Server Driver parameter for Genesys Voice (`Channel Type = Voice`):

- `Driver:TServerAppName` - the name of the T-Server application in the Genesys Configuration Manager.

Note: Customers who used previous versions of the Adapter and do *not* require the new functionality of the Genesys Voice Component (see the "Voice" section under "New in This Release (7.5)" in Chapter 4 "Administrator's Information"), may still use the `ServerHost` and `ServerPort` parameters described below.
Do *not* change the `TServerAppName = "CHANGE_ME"` parameter in this case. If `TServerAppName` is defined, then `ServerHost` and `ServerPort` parameters are ignored.

- `Driver:ServerHost` - the host name of the machine where T-Server is running
- `Driver:ServerPort` - the port number for T-Server in decimal form.

Make sure that values of these Driver parameters are unique in your Genesys CME. Do not use more then one T-Server application with same Host/Port combination.

Note: The Siebel Extensions and ACD Queues which correspond to the Genesys Open Media configuration only (those that do *not* correspond to the Genesys Voice configuration) are not synchronized with the Genesys environment.

Starting the Campaign Synchronization Component

After the Campaign Synchronization Component has been deployed, it must always be running to ensure that the Genesys environment stays up-to-date with the Siebel environment. Constantly running this component ensures that the Genesys environment reflects the latest configuration updates made in the Siebel environment.

The Campaign Synchronization Component can be started from the command line. The name of the component is:

- `GplusCampSynch.exe` for Windows

- `GplusCampSynch` for UNIX

This component supports the following command line options:

```
-host <host> -port <port> -app <application> [ -batch]
```

where:

- `host is` the name of the host where the Genesys Configuration Server is running.
- `port` is the port of the Genesys Configuration Server.
- `application` is the name of the Campaign Synchronization Component application.

The `-batch` option should be used to synchronize Call Results of campaigns which have been already executed but have not been yet synchronized their Call Results.

If you are using Windows, you can also start the Campaign Synchronization Component from the Start menu by going to `Programs > Genesys Solutions > Gplus Adapter for Siebel CRM` and selecting the component's shortcut (which has the same name as the Campaign Synchronization Component application object). This will start the component with the default command line options.

`Note:` You can use Genesys Management Layer, and specifically the Solution Control Interface, to start or stop or switch between primary and backup Campaign Synchronization Components. If you want to do this, make sure that the Command Line Arguments in the application Start Info tab do not include the `-service` argument.

Exporting Siebel Campaigns to Genesys

You specify the mapping between Genesys and Siebel objects by applying the options of the Campaign Synchronization Component application object. For more information, see the *G*plus *Adapter 7.5 for Siebel CRM Deployment Guide*.

Conditions and Requirements

Before you export a Siebel campaign from Siebel to Genesys, make sure that it meets all of the following conditions:

- The Siebel Organization (7.5.3, 7.7/7.8/8.0) to which the campaign belongs, is mapped to a Genesys Tenant.
- The Siebel User Name of the person who created the campaign is mapped to the corresponding application options of the G*plus* Campaign Synchronization Component, including: `Database Access Point`, `Table Access Folder`, `Calling List Folder`, and `Campaign Folder`.
- The Team field of the campaign and all its lists should include the original Siebel Administrator position.

- The Team field of the campaign and all its lists should include as a primary record the primary position(s) of users who may update information related to the campaign synchronization process.
- If you use Compatibility mode, make sure that all of these conditions are valid for each campaign in a campaign's parent-child hierarchy. Information about Compatibility mode is provided below, in the section titled "Compatibility Mode" on page 124.
- The list or segment name should not be the same as the campaign name to which the list or segment belongs.
- All contact/prospects of the campaign must include in the "Contact Team" field (the access list) as a primary record the primary positions of users who update "Do Not Call" properties of these contact/prospects. Otherwise, "Do Not Call" properties may not be synchronized. For Siebel 7.7/7.8/8.0 these contact/prospects must additionally include the position of the Siebel Administrator.

> Note: Synchronization of the "Do Not Call" property does not include deletions from the Genesys Outbound Contact Server table. You cannot delete information from the OCS Do Not Call table.

- All segments/lists of exported campaigns must have status equal to `Active` or `In Progress`.
- The Siebel user login used for `<username>` in the application option of the Adapter should have the same primary position (the record in the Team field) as one of the Siebel users who creates Siebel campaigns.
- All User logins related to Campaign Synchronization should have the same record (the position) to be set as a primary in the Position field (Employees view) and the Contact Team field (Users view).
- For the campaign to be exported in Siebel 7.7/7.8/8.0 environments, in the campaign execution options:
  - The Campaign Member Ownership field should be set to `Yes - Manually`
  - The Default Organization Owner field must contain the Siebel Organization, which is the same Organization as the Organization mapped to the Tenant in the application option
  - The Default Position Owner field must contain the position that is the same as the Primary Position of the Siebel User who is performing the export.

For more information, see also the *G*plus *Adapter 7.5 for Siebel CRM Deployment Guide.*

Note: If you export a campaign from the Siebel to the Genesys environment and the Genesys environment already has a campaign definition with the same name, the Campaign Synchronization Component will overwrite the existing Genesys campaign definition with the information from the exported campaign. Therefore, if you export two campaigns with the same name from the Siebel to the Genesys environment, the Genesys campaign definition for the first exported campaign will be overwritten by the data for the second exported campaign, and the first campaign in the Siebel environment will be out-of-sync with the data for this campaign in the Genesys environment. To avoid this problem, do not export two or more Siebel campaigns with the same name to the Genesys environment.

Synchronization Procedures

To import a Siebel campaign to the Genesys environment, you must:

- Assign the Genesys Campaign Export position to the campaign.
- Add Agent (or Place) Groups to the `Genesys Campaign` object, to complete the `Genesys Campaign` object configuration.

To assign the Genesys Campaign Export position to the campaign:

1. From the Site Map, select `Campaign Administration > Campaigns` (7.5.3) or `Campaign Management > Campaign List` (7.7/7.8/8.0).
2. Select the campaign to import to the Genesys environment and navigate to the Team applet for this campaign.
3. Assign the Genesys Campaign Export position to the campaign using the Team applet.

Note: In Compatibility mode, when importing a parent-child hierarchy of Siebel campaigns to the Genesys environment, the Genesys Campaign Export position can be assigned either to a Siebel parent campaign or to one of its children. The result of this action is that the Campaign Synchronization Component will automatically assign the position to the parent campaign and all its children and export this parent-child campaign structure to Genesys for processing.

The campaign is now imported to Genesys.

`Campaign`, `Calling List`, and `Table Access` objects are automatically created in the Genesys Configuration Layer when you export a Siebel campaign to Genesys. However, you must also manually perform the following procedures to complete the configuration:

1. Create the Agent (or Place) Group(s) in Genesys Configuration Manager

2. Configure the Agent (or Place) Group, being sure to add the already exported Agent(s) or Place(s) to the Group in Genesys Configuration Manager
3. Include the created Group in the campaign object and complete the campaign configuration as required.

See Genesys Outbound Contact Server (OCS) documentation for details of this configuration process.

When these steps are completed, the campaign is fully configured, and OCS can execute the exported campaign in the Genesys environment.

Table 3 describes objects created by the component during the campaign synchronization process.

Table 3: Campaign Synchronization Process Objects

Object	Description
Campaign Configuration Manager Object	One Genesys Configuration Manager Campaign object is created for the imported campaign. • The object has the same name as the corresponding Siebel Campaign. • The object is created under a Campaigns subfolder for the Siebel Call Center user who created the campaign. • The Campaign folder assignment is specified within the CampaignFolders section of the Campaign Synchronization Component application object.
Calling List Configuration Manager Object(s)	One Genesys Configuration Manager Calling List object is created for every Siebel Segment or List from the imported campaign. • The object has the name created as a concatenation of the corresponding Siebel segment/list name and the corresponding campaign name. • The object is created under a Calling Lists subfolder for the Siebel Call Center user who created the campaign. • The Calling List folder assignment is specified within the CallingListFolders section of the Campaign Synchronization Component application object.

Table 3: Campaign Synchronization Process Objects (Continued)

Object	Description
Table Access Configuration Manager Object(s)	One Genesys Configuration Manager Table Access object is created for every Siebel segment or list from the imported campaign. • The object has the name created as a concatenation of the corresponding Siebel segment/list name and the corresponding campaign name. • The object is created under a Table Access subfolder for the Siebel Call Center user who created the campaign. • The Table Access folder assignment is specified within the TableAccessFolders section of the Campaign Synchronization Component application object.
Calling List Table(s) and Indexes in the OCS database	One Calling List table with contact records and related indexes are created for every Siebel segment or list from the imported campaign. • The table has a name in the format CLT XXXX, where XXXX stands for a unique table ID. • The table is created in the OCS database according to the Database Access Point designation for the Siebel Call Center user who created the campaign. • The Database Access Point assignment is specified within the "DatabaseAccessPoints" section of the Campaign Synchronization Component application object.

As long as the imported Campaign has the Genesys Campaign Export position assigned, the Campaign Synchronization Component will propagate changes made to the Campaign definition in the Siebel environment to the Genesys environment.

Deleting Siebel Campaigns from Genesys

To delete a Siebel Campaign from the Genesys environment:

1. From the Site Map, select `Campaign Administration > Campaigns`.
2. In the Campaigns applet, select the campaign to delete from the Genesys environment.
3. Delete the campaign from the applet.

   This removes both the Siebel campaign and its corresponding Genesys Campaign, Calling List, and Table Access objects provided that the Genesys Campaign Export position was originally associated with the Siebel Campaign.

   If you delete just the Genesys Campaign Export Position you will not be deleting the corresponding Genesys Campaign, Calling List, and Table Access objects. You must delete the entire Siebel Campaign to delete the Genesys Campaign, Calling List, and Table Access objects.

   Deleting the Genesys Campaign Export Position from the Team members of a campaign means that this campaign is not included in the Synchronization process any more. Thus, if you delete a campaign after deleting the position, the deletion of the campaign will not have any effect in the Synchronization process.

Time Zones

You have to synchronize the names of Time Zones in Genesys and Siebel environments. This means that you must make the Time Zone names used in your Genesys environment match those in your Siebel environment. When you are finished, all Time Zones used in reference to contacts or prospects in your Siebel environment must be present in Genesys. For more information, see the *G*plus *Adapter 7.5 for Siebel CRM Deployment Guide*.

Note: If Time Zones have been imported in the Genesys Environment while the Campaign Synchronization component was running (after the deployment), this component must be restarted to accept these changes.

Calling List Management

The G*plus* Adapter for Siebel CRM Campaign Synchronization Component provides server-side integration that synchronizes Genesys OCS with Siebel Marketing Administration and calling list management actions.

Using the desktop interface, the supervisor and agents enter campaign definition data. The data is automatically imported into the Genesys

Configuration database and is then accessible through the Genesys Configuration Management environment (assuming that the proper associations have been made):

- `Calling Lists` > `Campaigns` > `Agent Groups`

Siebel contacts/prospects in defined callings lists are also automatically made available to Genesys OCS for loading and running in their associated campaigns.

The Genesys Outbound Contact Manager application provides execution control of the campaigns that were defined in Siebel.

Note: Genesys Outbound Contact does not support dialing phone numbers with extensions. Therefore, such phone numbers should not be used in Siebel campaigns that are exported to Genesys using the G*plus* Adapter for Siebel CRM Campaign Synchronization Component.

Regular and Compatibility Modes

The G*plus* Adapter supports the ability to import Campaigns and campaign contact records from a Siebel CRM Call Center. The import process is made possible through the use of one of two data mapping modes, `Regular mode` and `Compatibility mode`. One of these modes was selected when the Genesys G*plus* Adapter was deployed at your organization. The Regular mode is the default mode.

As a general rule, the G*plus* Adapter Campaign Synchronization component works in the background and requires no special handling. However, it is useful to understand how the G*plus* Adapter maps Siebel campaigns to Genesys campaigns and how it translates the hierarchy of Siebel Contact Records to Genesys Calling Lists. This section provides detailed information that may be useful if you need to re-use a campaign or list in some way, or if you need information concerning the way a list has been maintained or used.

Note: In the descriptions in this section, the term "list" may refer to either a Siebel list or a Siebel segment. Properly speaking, Siebel allows users to define lists or segments, where lists are collections of individual contacts, and segments are subsets (defined by logical selection criteria) of the available population of contacts. If the distinction is necessary, the term "segment" is used.

Differences Between the Modes

The crucial difference between the Regular mode and Compatibility mode lies in the way each mode processes Campaigns that have been set up with a parent-child hierarchy relationship. If you never use multiple campaigns set up

with parent-child relationships to build complex campaigns, then the default mode of Campaign Synchronization, Regular mode, is probably suited for your purposes. Regular mode does not recognize or reproduce parent-child relationships among campaigns.

Figure 60 on page 117 shows how Siebel campaigns with parent-child relationships are mapped into Genesys Campaigns in Regular mode. Figure 61 shows how Siebel campaigns with parent-child relationships are mapped into Genesys Campaigns in Compatibility mode.

Note: In the descriptions in this section, the term "list" may refer to either a Siebel list or a Siebel segment. Properly speaking, Siebel allows users to define lists or segments, where lists are collections of individual contacts, and segments are subsets (defined by logical selection criteria) of the available population of contacts. If the distinction is necessary, the term "segment" is used.

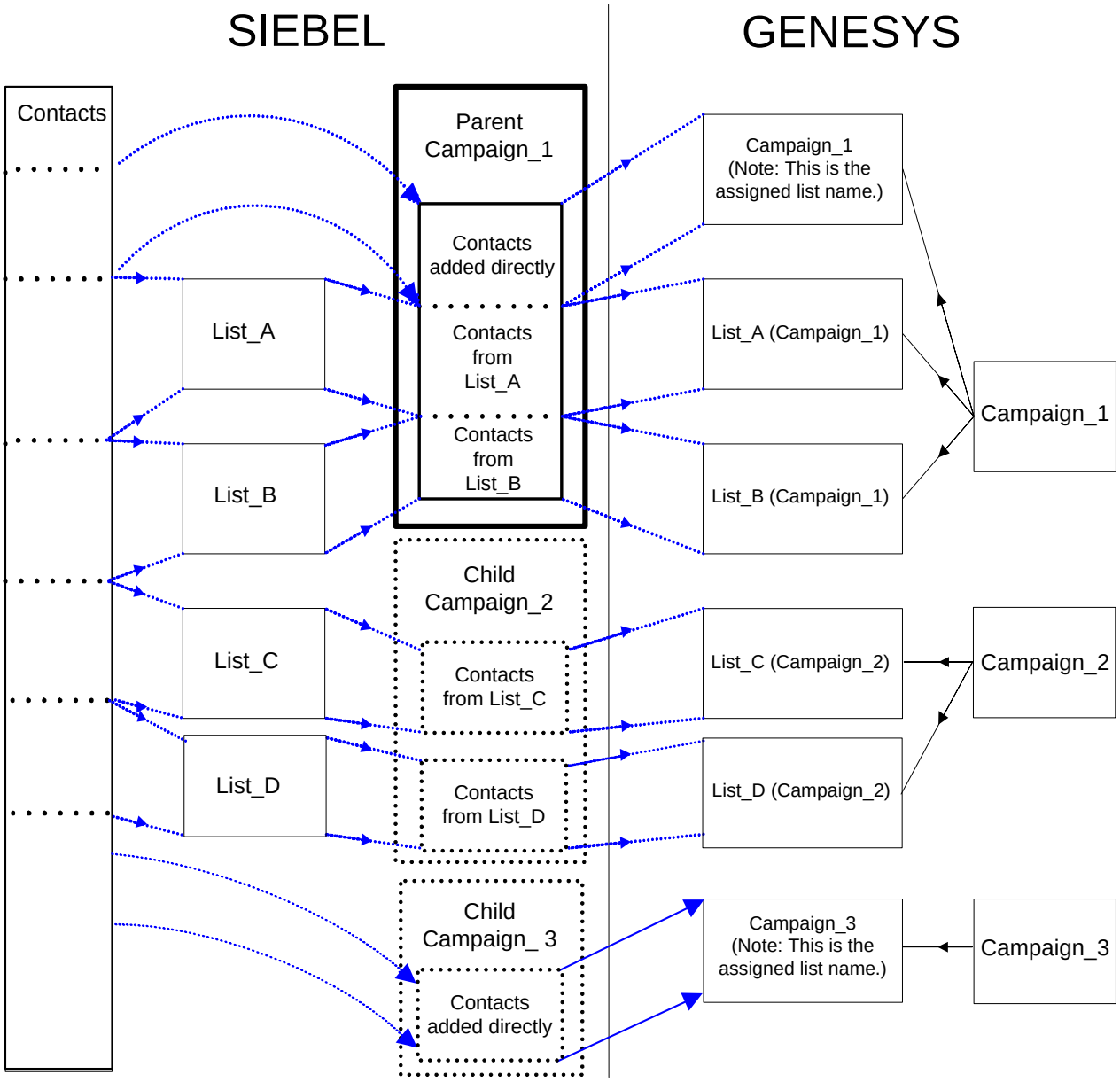

Figure 60: Campaign Synchronization in Regular Mode, with mapping of a Siebel Parent-Child Campaign structure

Figure 60 shows that, in Regular mode, Campaign_1, Campaign_2, and Campaign_3 are reproduced in Genesys, and their elements are renamed so that you can recognize them easily. The Siebel segment or list that is titled List_A in Campaign_1 is renamed in Genesys as List_A(Campaign_1). The Siebel contact records that were added directly to Siebel Campaign_1 are put into a Genesys contact list that is simply titled "Campaign_1."

Note: If the Siebel campaigns in Figure 60 were not parent and children, the Genesys side of the mapping would still be exactly the same.

In Compatibility mode, as shown in Figure 61, the same naming convention is applied to the lists, but all of the lists under the parent's hierarchy are assigned to the parent campaign. The child-campaigns are not created.

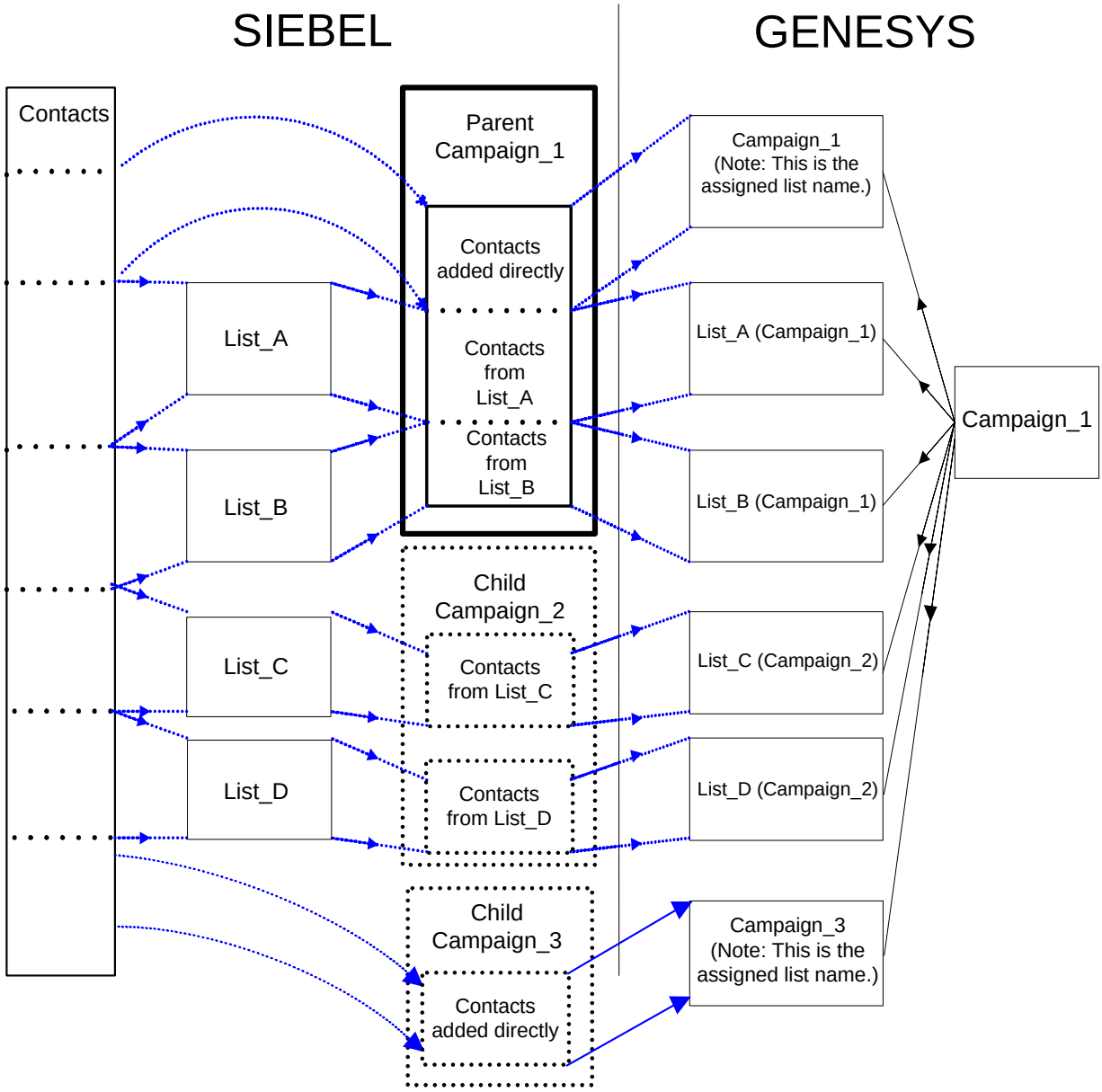

Figure 61: Campaign Mapping in Compatibility Mode, with all lists from the combined Siebel Parent-Child Campaign_1 structure mapped just to Campaign_1

Regular Mode Summary

If you are using Regular mode, then the Campaign Synchronization component reproduces all campaigns. It does not matter if these campaigns were structured in a Parent-Child relationship in Siebel. Each campaign is treated as a separate entity, and no distinction is made between a parent and a child campaign. Thus, if a Siebel campaign was set up as a parent campaign, the G*plus* Adapter does *not* reproduce the hierarchical structure, and the contact lists of a parent campaign's children are *not* "rolled-up" into a comprehensive parent list. Each campaign is associated with its own lists (including contacts added directly to the campaign) and no other campaign's list.

Full details about the functions and use of Campaign Synchronization in Regular mode are provided below.

Compatibility Mode Summary

If you are using the Compatibility mode, then the Campaign Synchronization component reproduces the parent campaign with all contact lists from all of its child campaigns. Child campaigns are not reproduced as such, although the contact lists of each child campaign are rolled up into the parent campaign. A naming convention makes it possible to identify the title of any child campaigns that were rolled up into the parent campaign. Any contacts that were added directly to a campaign are preserved and reproduced as a list associated with that campaign.

Full details about the functions and use of Campaign Synchronization in Compatibility mode are provided below.

For information about changing the mapping mode, see the *G*plus *Adapter 7.5 for Siebel CRM Deployment Guide.*

Regular Mode

In the Regular mode, which is the default mapping mode, the Campaign Synchronization Component creates a Genesys Campaign object for each Siebel Campaign.

Guidelines for data mapping with the Regular mode, corresponding to three levels of organizational structure, are listed below:

Mapping of the Siebel Campaign to the Genesys Campaign

- For each Siebel campaign (parent or child), the Campaign Synchronization Component creates a corresponding Genesys Campaign object.

Mapping of Siebel Contact Records to Genesys Calling Lists

- For Campaign contact records that were added from Siebel Segments/Lists, corresponding Genesys calling lists are created.

- For campaign contact records that were added directly to a campaign from Siebel Contacts (without using Siebel Segments/Lists), a separate Genesys calling list is created.

Genesys Campaign/Calling List mapping

- All Genesys calling lists that were created for a particular Siebel campaign are linked to the corresponding Genesys Campaign object.

The mapping schema for the Regular mode is illustrated in Figure 60 on page 117.

Use Cases for Regular Mode

Procedure for Exporting a Siebel Campaign to Genesys in Regular Mode

Refer to the example of Campaign_1 in Figure 60 for an illustration of this process and its results. Although the illustration in Figure 60 labels Campaign_1 as a parent, the campaign synchronization mapping in Regular mode does not process hierarchical relationships. Synchronization results are the same, regardless of the parent or child labels or relationships.

Note that the naming convention applied in this procedure re-applies the names originally assigned to the campaign and its lists.

In Regular mode, when exporting a Siebel campaign (for example, Campaign_1) with all its contact members to the Genesys environment, the Campaign Synchronization component performs the processes listed below.

1. The Campaign Synchronization component creates a Campaign object "Campaign_1", a Calling List object "Campaign_1", the Table Access object "Campaign_1", and a calling list table with contacts directly associated with Campaign_1. The component then assigns the created calling list to Campaign_1.
2. For each List or Segment with name "XXX" in Campaign_1 in Siebel, the Campaign Synchronization component creates a Calling List with name "XXX (Campaign_1)", a Table Access object "XXX (Campaign_1)", and a calling list table with contacts from the Siebel Segment/List. The component assigns this created calling list to Campaign_1.
3. If a Genesys `Campaign` object with the same name as the exported Siebel campaign exists (because the campaign has previously been exported), then the Campaign Synchronization component deletes the `Calling List` objects, `Table Access` objects and calling list tables with contacts related to the Siebel Lists or Segments which are not included in the Campaign at the moment.

The scenario described above explains the fundamental interaction between Siebel and the Genesys Campaign Synchronization component as it functions in Regular mode. The Siebel user may perform many smaller and intermediate tasks, however, and these are described in Table 4, "Use Cases Supported in

Regular Mode," on page 121. Several of the normal Siebel tasks (tasks that are associated with building and maintaining a campaign) also trigger additional Genesys processes, and these are also described in Table 4.

Synchronization Procedures and Related Processes

Table 4 describes the use cases supported by the Campaign Synchronization Component in Regular mode. This table lists the tasks associated with campaign synchronization, explains the related synchronization processing that takes place, and mentions any conditions required for processing. When the Siebel user performs the actions in the first column, the Campaign Synchronization Component performs the corresponding actions in the third column, if the conditions in the second column are met.

Note that the presence of the Genesys Campaign Export position for a Siebel campaign signifies that the data for that Siebel campaign has been exported to Genesys and that the Siebel campaign is ready for run-time data synchronization.

Refer to Figure 60 for an illustration of the following processes and their results. Although the illustration in Figure 60 labels Campaign_1 as a parent, the campaign synchronization mapping in Regular mode does not process hierarchical relationships. Synchronization results are the same, regardless of parent or child relationships.

Table 4: Use Cases Supported in Regular Mode

What the Siebel User Does	Siebel Condition(s)	What the Campaign Synchronization Component Does in the Genesys Environment
Create a campaign (for example, "Campaign_1").	None	None
Assign the Genesys Campaign Export position to a campaign, "Campaign_1".	The campaign "Campaign_1" has not been associated with the Genesys Campaign Export position, at this moment.	Export the campaign "Campaign_1" with all its members. (See the description above, in the section titled "Procedure for Exporting a Siebel Campaign to Genesys in Regular Mode" on page 120.)
Load the campaign, "Campaign_1" (for Siebel 7.7/7.8/8.0 only).	The campaign "Campaign_1" is associated with the Genesys Campaign Export position.	Export the campaign "Campaign_1" with all its members. (See the description above, in the section titled "Procedure for Exporting a Siebel Campaign to Genesys in Regular Mode" on page 120.)

Table 4: Use Cases Supported in Regular Mode (Continued)

What the Siebel User Does	Siebel Condition(s)	What the Campaign Synchronization Component Does in the Genesys Environment
(Reserved for future use.)		
Assign a contact (named, for example, "Contact A") directly to the campaign, "Campaign_1"	The campaign "Campaign_1" is associated with the Genesys Campaign Export position.	Add record(s) for the contact, "Contact A", to the calling list, "Campaign_1".
Update the contact "Contact A"	1. The contact "Contact A" is assigned directly to the campaign "Campaign_1" 2. The campaign "Campaign_1" is associated with the Genesys Campaign Export position.	Update record(s) for "Contact A" in the calling list "Campaign_1".
Delete the contact Contact A from the campaign Campaign_1	1. Contact A is assigned directly to the campaign "Campaign_1"; 2. The campaign "Campaign_1" is associated with the Genesys Campaign Export position.	Delete the record(s) for "Contact A" from the calling list "Campaign_1".
Assign the segment/list "List A" to the campaign "Campaign_1"	The campaign "Campaign_1" is associated with the Genesys Campaign Export position.	For Siebel 7.5.3: Create the calling list ("List A (Campaign_1)") the Table Access object "List A (Campaign_1)" and a calling list table with contacts from the Siebel segment/list "List A" and assign the created calling list to the campaign "Campaign_1". For Siebel 7.7/7.8/8.0: No actions until campaign reload.

Table 4: Use Cases Supported in Regular Mode (Continued)

What the Siebel User Does	Siebel Condition(s)	What the Campaign Synchronization Component Does in the Genesys Environment
Update the contact (Contact B)	1. Contact B is assigned to the segment/list "List A" 2. The segment/list "List A" is assigned to the campaign "Campaign_1" 3. The contact is a member of the campaign "Campaign_1" and Campaign_1 is associated with the Genesys Campaign Export position 4. Either Phone field or Do Not Call field has been updated.	For Siebel 7.5.3: Update the record(s) for Contact B in the calling list "List A(Campaign_1)". For Siebel 7.7/7.8/8.0: No actions until campaign reload.
Assign the contact (Contact C) to the segment/list "List A"	1. The segment/list "List A" is assigned to the campaign "Campaign_1"; 2. The campaign "Campaign_1" is associated with the Genesys Campaign Export position.	Nothing. Note: Siebel do not add contacts to campaign members while adding a contact to a list, though the list has been added to the campaign.
Update the contact (Contact C)	The same as in the case "i", but the contact is not a member of the campaign "Campaign_1".	Nothing.
Delete the contact (Contact C) from the segment/list "List A"	The same as in the case "k".	Nothing.
Delete the segment/list "List A" from the campaign, Campaign_1	The campaign Campaign_1is associated with the Genesys Campaign Export position.	For Siebel 7.5.3: Delete the calling list, "List A (Campaign_1)", the Table Access object, "List A (Campaign_1)", and delete the calling list table with contacts. For Siebel 7.7/7.8/8.0: No actions until campaign reload.

Table 4: Use Cases Supported in Regular Mode (Continued)

What the Siebel User Does	Siebel Condition(s)	What the Campaign Synchronization Component Does in the Genesys Environment
Delete the Genesys Campaign Export position from the campaign "Campaign_1"	None	Nothing. Note: The synchronization will not continue after the Genesys Campaign Export position is deleted.
Delete the campaign "Campaign_1"	The campaign "Campaign_1" is associated with the Genesys Campaign Export position.	Delete the Campaign object, the Calling Lists objects assigned to the campaign "Campaign_1", the associated Table Access objects, and delete the calling list tables with contacts.

Compatibility Mode

In the Compatibility mode, for a Siebel campaign tree consisting of parent and child campaigns, the Campaign Synchronization Component creates a single Genesys Campaign object corresponding to the top-level Siebel Parent campaign.

The data mapping scenarios for the Compatibility mode are described below:

Mapping of a Siebel Campaign to a Genesys Campaign

- In the Compatibility mode, the Campaign Synchronization Component considers any Siebel campaign to be a parent unless the Parent Campaign Field for the campaign is not empty, in which case the campaign is considered to be a child.
- For each Siebel parent campaign, the Campaign Synchronization Component creates a corresponding Genesys Campaign object.
- For Siebel child campaigns, a corresponding Genesys Campaign object is not be created.

Mapping of Siebel Contact records to Genesys Calling Lists

- For campaign contact records that were added from Siebel Lists (that is, segments or lists), corresponding Genesys calling lists are created.
- For campaign contact records that were added directly to a campaign from Siebel Contacts (without using Siebel segments or lists), a separate Genesys calling list is created.

Genesys Campaign/Calling List Mapping

- All Genesys calling lists created for a particular Siebel parent campaign and its Siebel child campaigns are linked to the corresponding Genesys Campaign object.

Figure 61 on page 118 illustrates the mapping schema for Compatibility mode.

Use Cases for Compatibility Mode

You can assign the Genesys Campaign Export position either to a Siebel Parent Campaign or to one of its Children. The result of this action is that the Campaign Synchronization Component assigns the position to the parent and all its children automatically and exports this parent-child campaign structure to Genesys for processing.

Note: As explained elsewhere in this chapter, Genesys does not re-create the parent-child campaign structure. Specifically, Genesys does not re-create the child-campaigns. Rather, it re-creates the lists (including segments and lists) contained in Siebel child campaigns, links these lists to the parent campaign (which is re-created in Genesys), and names the re-created lists so that their associations with specific Siebel child-campaigns is easy to trace.

Procedure for Exporting a Siebel Campaign to Genesys in Compatibility Mode

Refer to the example of Campaign_1 in Figure 61 on page 118 for an illustration of this process and its results. Although the illustration in Figure 61 labels Campaign_1 as a parent and Campaign_2 and Campaign_3 as children, the campaign synchronization mapping in Compatibility mode does not re-create child campaigns and so does not strictly replicate all the campaigns and their hierarchical relationships.

In Compatibility mode, when exporting a Siebel campaign (for example, Campaign_1) with all its contact members to the Genesys environment, the Campaign Synchronization component performs the processes listed below. Note that the naming convention applied in this procedure re-applies the names originally assigned to the campaign and its lists.

In Compatibility mode, when exporting the entire parent-child campaign hierarchy with all its members (refer to the parent campaign called "Campaign_1" in Figure 61) to the Genesys environment, the Campaign Synchronization Component takes these actions:

1. If the parent campaign "Campaign_1" in Siebel does not have the Genesys Campaign Export position, then:
   - Create the campaign object "Campaign_1"

- Create a Calling List object "Campaign_1", a Table Access object "Campaign_1", and a calling list table with contacts that are directly associated with the campaign "Campaign_1" in Siebel and assign the created calling list to the campaign "Campaign_1"
- For each Siebel segment or list of the parent campaign "Campaign_1", create the Calling List object with the name "XXX (Campaign_1)", the Table Access object, "XXX (Campaign_1)", and a calling list table with the contacts from the Siebel segment/list, and assign the created calling list to the campaign, "Campaign_1", where "XXX" stands for the Siebel segment or list name.

2. For each child campaign of campaign "Campaign_1" in Siebel that does not have the Genesys Campaign Export position:
   - Create the Calling List object "YYY", the Table Access object "YYY", and a calling list table with contacts that are directly associated with the Child Campaign, and assign the created Calling List to the campaign "Campaign_1" where "YYY" stands for the Siebel Child campaign name
   - For each Siebel segment/list of the child campaign, create the Calling List "XXX (YYY)", the Table Access object, "XXX (YYY)", and a calling list table with contacts from the Siebel segment/list and assign the created calling list to the campaign "Campaign_1" where "XXX" stands for the Siebel segment or list name, and "YYY" stands for the Siebel Child campaign name
3. For each child campaign of the campaign "Campaign_1" in Siebel that has the Genesys Campaign Export position:
   - Assign the calling list "YYY" to the campaign "Campaign_1" where "YYY" stands for the Siebel Child campaign name
   - For each Siebel segment or list of the child campaign, assign the calling list "XXX (YYY)" to the campaign "Campaign_1" where "XXX" stands for the Siebel segment or list name, and "YYY" stands for the Siebel Child campaign name
   - Delete the campaign "YYY", where "YYY" stands for the Siebel Child campaign name
4. If a Genesys `Campaign` object with the same name as the exported Siebel parent campaign exists (because the campaign has previously been exported), then the Campaign Synchronization component deletes the `Calling List` objects, `Table Access` objects and calling list tables with contacts related to the Siebel Lists or Segments which are not included in the Campaign hierarchy at the moment. In some cases, lists which were previously exported to Genesys have subsequently been deleted from Siebel, and it is necessary to manually remove these out-of-date lists.
5. In Siebel environment, assign the Genesys Campaign Export position to the campaign "Campaign_1" and all of its children.

The presence of the **Genesys Campaign Export position** for a Siebel campaign (either a parent or a child) signifies that the data for that Siebel campaign has been exported to Genesys and that the Siebel campaign is ready for run-time data synchronization.

Table 5 on page 127 describes use cases supported by the Campaign Synchronization Component in the Compatibility mode. When the Siebel Campaign Administrator performs the actions in the first column, the Campaign Synchronization Component performs the corresponding actions in the third column, if the respective condition(s) from the second column are met. Refer to Figure 61 on page 118 for an illustration of these processes and their results.

Table 5: Use Cases Supported in the Compatibility Mode

What the Siebel Campaign Administrator Does	Condition(s)	What the Campaign Synchronization Component Does
Create the parent campaign, "Campaign_1".	None	None
Assign the Genesys Campaign Export position to the parent campaign, "Campaign_1" or any child campaign of the campaign, "Campaign_1".	The Parent Campaign Field for the campaign, "Campaign_1" is empty and the campaign "Campaign_1" has not been associated with the Genesys Campaign Export position.	Export the entire parent-child campaign hierarchy (parent campaign "Campaign_1") with all its members. (See the description above, in the section titled "Procedure for Exporting a Siebel Campaign to Genesys in Compatibility Mode" on page 125.)
Load either the parent campaign "Campaign_1" or any child campaign of it. (for Siebel 7.7/7.8/8.0 only).	The campaign "Campaign_1" is associated with the Genesys Campaign Export position.	Export the entire parent-child campaign hierarchy (parent campaign "Campaign_1") with all its members. (See the description above, in the section titled "Procedure for Exporting a Siebel Campaign to Genesys in Compatibility Mode" on page 125.)
Assign the contact (Contact A) directly to the campaign, Campaign_1	The campaign, "Campaign_1" is associated with the Genesys Campaign Export position.	Add record(s) for the contact, "Contact A," to the calling list, "Campaign_1."
Update the contact "Contact A"	1. The contact "Contact A" is assigned directly to the campaign "Campaign_1". 2. The campaign "Campaign_1" is associated with the Genesys Campaign Export position.	Update the record(s) for the contact "Contact A" in the calling list "Campaign_1".

Table 5: Use Cases Supported in the Compatibility Mode (Continued)

What the Siebel Campaign Administrator Does	Condition(s)	What the Campaign Synchronization Component Does
Delete the contact "Contact A" from the campaign "Campaign_1"	1. The contact "Contact A" is assigned directly to the campaign "Campaign_1" directly; 2. The campaign "Campaign_1" is associated with the Genesys Campaign Export position.	Delete the record(s) for the contact "Contact A" from calling list "Campaign_1".
Assign the segment/list "List A" to the campaign "Campaign_1"	1. The campaign "Campaign_1" is associated with the Genesys Campaign Export position. 2. The Parent Campaign Field for the campaign "Campaign_1" is empty.	For Siebel 7.5.3: Create the calling list "List A (Campaign_1)", the Table Access object, "List A (Campaign_1)", and a calling list table with contacts from the Siebel segment/list, List A and assign the created calling list to the campaign "Campaign_1". For Siebel 7.7/7.8/8.0: No actions until campaign reload.
Update the contact "Contact B"	1. The contact "Contact B" is assigned to the segment/list "List A"; 2. The segment/list "List A" is assigned to the campaign "Campaign_1"; 3. The campaign "Campaign_1" is associated with the Genesys Campaign Export position.	Update the record(s) for the contact "Contact B" in the calling list, "List A (Campaign_1)".
Assign the contact "Contact C" to the segment/list "List A"	1. The segment/list "List A" is assigned to the campaign "Campaign_1"; 2. The campaign "Campaign_1" is associated with the Genesys Campaign Export position.	Nothing. Note: Though the segment/list "List A" is assigned to the campaign "Campaign_1", Siebel will not add the contact "Contact C" to the campaign "Campaign_1".

Table 5: Use Cases Supported in the Compatibility Mode (Continued)

What the Siebel Campaign Administrator Does	Condition(s)	What the Campaign Synchronization Component Does
Update the contact "Contact C"	1. The contact "Contact C" is assigned to the segment/list "List A"; 2. The segment/list "List A" is assigned to the campaign "Campaign_1"; 3. The campaign "Campaign_1" is associated with the Genesys Campaign Export position.	Nothing.
Delete the contact "Contact C" from the segment/list "List A"	1. The contact "Contact C" is assigned to the segment/list "List A"; 2. The segment/list "List A" is assigned to the campaign "Campaign_1"; 3. The campaign "Campaign_1" is associated with the Genesys Campaign Export position.	Nothing.
Delete the segment/list "List A" from the campaign "Campaign_1"	1. The campaign "Campaign_1" is associated with the Genesys Campaign Export position; 2. The Parent Campaign Field for the campaign "Campaign_1" is empty.	Delete the calling list "List A (Campaign_1)", the Table Access object "List A (Campaign_1)" and the calling list table with contacts.
Create the campaign "Child"	None.	Nothing.

Table 5: Use Cases Supported in the Compatibility Mode (Continued)

What the Siebel Campaign Administrator Does	Condition(s)	What the Campaign Synchronization Component Does
Set the Parent Campaign Field of the campaign "Child" to "Campaign_1"	1. The campaign "Campaign_1" is associated with the Genesys Campaign Export position; 2. The campaign "Child" is not associated with the Genesys Campaign Export position	1. Create the calling list "Child", the Table Access object "Child", and a calling list table with contacts directly associated with the campaign "Child" in Siebel and assign the created calling list to the parent campaign "Campaign_1"; 2. For each segment/list in the campaign "Child" in Siebel, create the calling list "XXX (Child)", the Table Access object "XXX (Child)", and a calling list table with the contacts from the Siebel segment/list and assign the created calling list to the parent campaign, "Campaign_1", where XXX stands for the Siebel Segment/list name; 3. In Siebel, assign the Genesys Campaign Export position to the campaign "Child".
Set the Parent Campaign Field of the campaign "Child" to Campaign_1	1. The parent campaign "Campaign_1" is associated with the Genesys Campaign Export position; 2. The campaign "Child" is associated with the Genesys Campaign Export position.	1. Assign the calling list "Child" to the parent campaign "Campaign_1"; 2. For each segment/list in the campaign "Child" in Siebel, assign the calling list "XXX (Child)" to the parent campaign "Campaign_1", where XXX stands for the Siebel Segment/list name; 3. Delete the campaign "Child".
Set the Parent Campaign Field of the campaign "Child" to "Campaign_1"	1. The parent campaign "Campaign_1" is not associated with the Genesys Campaign Export position; 2. The campaign "Child" is associated with the Genesys Campaign Export position.	Export the entire parent-child campaign hierarchy (parent campaign "Campaign_1") with all its members. (See the description above, in the section titled "Procedure for Exporting a Siebel Campaign to Genesys in Compatibility Mode" on page 125.)
Assign the contact "Contact D" directly to the campaign "Child"	1. The campaign "Child" is associated with the Genesys Campaign Export position.	Add the record(s) for the contact "Contact D" to the calling list "Child".

Table 5: Use Cases Supported in the Compatibility Mode (Continued)

What the Siebel Campaign Administrator Does	Condition(s)	What the Campaign Synchronization Component Does
Update the contact "Contact D"	1. The contact "Contact D" is assigned directly to the campaign "Child"; 2. The campaign "Child" is associated with the Genesys Campaign Export position.	Update the record(s) for the contact "Contact D" in the calling list "Child".
Delete the contact "Contact D" for the campaign "Child"	1. The contact "Contact D" is assigned to the campaign "Child" directly; 2. The campaign "Child" is associated with the Genesys Campaign Export position.	Delete the record(s) for the contact "Contact D" from the calling list "Child".
Assign the segment/list "List B" to the campaign	1. The campaign "Child" is associated with the Genesys Campaign Export position; 2. The Parent Campaign Field of the campaign "Child" is set to Campaign_1.	For Siebel 7.5.3: Create the calling list, "List B (Child)", the Table Access object, "List B (Child)", and a calling list table with contacts from the Siebel Segment/list "List B", and assign the created calling list to the campaign "Campaign_1". For Siebel 7.7/7.8/8.0: No actions until campaign reload.
Assign the contact "Contact E" to the segment/list "List B"	1. The segment/list "List B" is assigned to the campaign "Child"; 2. The campaign "Child" is associated with the Genesys Campaign Export position.	None Note: Though segment/list "List B" is assigned to the campaign "Child", Siebel will not add the contact "Contact E" to the campaign "Child".
Update the contact "Contact E"	1. The contact "Contact E" is assigned to the segment/list "List B"; 2. The segment/list "List B" is assigned to the campaign "Child"; 3. The campaign "Child" is associated with the Genesys Campaign Export position.	Nothing.

Table 5: Use Cases Supported in the Compatibility Mode (Continued)

What the Siebel Campaign Administrator Does	Condition(s)	What the Campaign Synchronization Component Does
Delete the contact "Contact E" from the segment/list "List B"	1. The contact "Contact E" is assigned to the segment/list "List B"; 2. The segment/list "List B" is assigned to the campaign "Child"; 3. The campaign "Child" is associated with the Genesys Campaign Export position.	Nothing.
Delete the segment/list "List B" from the campaign "Child"	1. The campaign "Child" is associated with the Genesys Campaign Export position; 2. The Parent Campaign Field of the campaign "Child" is set to "Campaign_1".	For Siebel 7.5.3: Delete the calling list "List B (Child)", the Table Access "List B", and delete the calling list table with contacts. For Siebel 7.7/7.8/8.0: No actions until Campaign reload.
Set the Parent Campaign Field of the campaign "Child" to empty	1. The Parent Campaign Field of the campaign "Child" is set to "Campaign_1"; 2. The parent campaign "Campaign_1" is associated with the Genesys Campaign Export position; 3. The campaign "Child" is associated with the Genesys Campaign Export position.	1. Create the campaign "Child"; 2. Delete the calling list "Child" from the parent campaign "Campaign_1"; 3. Assign the calling list "Child" to the campaign "Child"; 4. For each segment/list in the campaign "Child" in Siebel, delete the calling list "XXX (Child)" from the parent campaign "Campaign_1" where "XXX" stands for the Siebel Segment/list name; 5. For each segment/list in the campaign "Child" in Siebel, assign the Calling List "XXX (Child)" to the campaign "Child" where "XXX" stands for the Siebel Segment/list name.

Table 5: Use Cases Supported in the Compatibility Mode (Continued)

What the Siebel Campaign Administrator Does	Condition(s)	What the Campaign Synchronization Component Does
Delete the Genesys Campaign Export position from the campaign "Parent B"	None.	Nothing. Note: The synchronization will not continue after the Genesys Campaign Export position is deleted.
Delete the parent campaign "Campaign_1"	The parent campaign "Campaign_1" is associated with the Genesys Campaign Export position.	1. Delete all calling lists objects assigned to the campaign "Campaign_1" the associated Table Access objects, and delete the calling list tables with contacts; 2. Delete the campaign "Campaign_1".

Campaign Management Notes for Siebel 7.7/7.8/8.0 Users

Siebel 7.7/7.8/8.0 implemented a new approach for campaign management processes such as "Load Campaign" and "Launch Campaign". In Siebel 7.7/7.8/8.0, the segment/list members, such as contacts or prospects, become available as campaign members for Siebel Call Center agents only after the campaign was loaded *and* launched. In previous versions, contacts and prospects from Siebel lists become available as campaign members immediately after the lists were assigned to the campaign.

In Siebel 7.7/7.8/8.0, the Campaign Synchronization component exports campaign members to Genesys on the "Load Campaign" event, when they are actually added to the campaign, instead of on the "Assign List" event, as was the case in the previous Siebel versions.

It is important to understand that, if you have reloaded the campaign but have not launched it yet, then there may be a difference between what Siebel Call Center agents can see in their Campaign members list and what was actually exported to Genesys environment. To avoid such differences, do not re-load a campaign on the Siebel side while it is being executed by Genesys Outbound Contact, and while agents are working in that campaign. If such a re-load is required, follow these steps to synchronize Siebel and Genesys environments:

1. Stop and unload the campaign on the Genesys side.
2. Load and launch the campaign on the Siebel side.
3. Load and start campaign on Genesys side.

Note: If you reload a campaign two or more times, then the Adapter will synchronize members of this campaign based on the rule that only members who are contained in the last campaign load are considered as active members. This means that contacts/prospects that were not included in the last campaign load will be deleted from Genesys Campaign lists. With regard to contacts/prospects who were added directly to the campaign, this also means that you have to add them to the campaign after the last campaign load.

Note: In Siebel 7.7/7.8/8.0, synchronization of the removal of a single List (the last) from the Campaign can be performed only by re-exporting this Campaign, because the "Load Campaign" command is not available after the last list has been removed.

Mapping Calling Lists

Regardless of the campaign mapping mode you use, when the same Siebel List (that, the same segment or list) is used in two separate Siebel campaigns, the Campaign Synchronization Component creates two separate Genesys calling lists.

The Siebel environment does not place any restrictions on the number of times a contact or prospect can be included in a list or a campaign or its child campaigns. As a result, if a contact or prospect is included more than once in an exported Siebel list or campaign, the Genesys definition for the respective calling list or campaign also includes the contact or prospect information more than once.

For example, in the Campaign Synchronization Compatibility mapping mode, if the same Siebel list is assigned to an exported Siebel campaign and one of its child campaigns, the same contact records will be included twice in the Genesys campaign definition. This situation is illustrated in Figure 62 on page 135 in which the contact records from List B in Siebel will be stored in

Calling List COB and Calling List C1B in Genesys and both lists are included in Campaign 0.

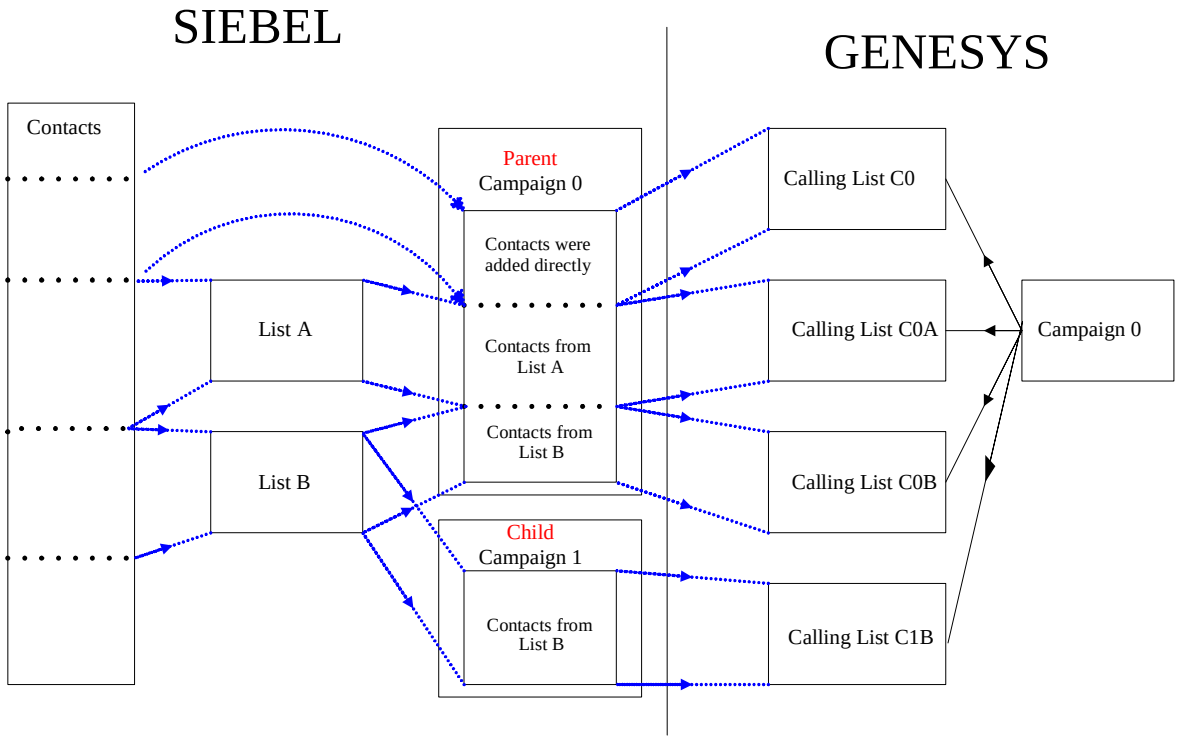

Figure 62: Duplication of Contact Records

Chapter

5 Troubleshooting

This chapter provides some solutions to common problems.

Overview

Use Table 6 on page 138 to find solutions to some common problems.

Table 6: Problems and Solutions

Problem Description	Solution
The G*plus* Adapter for Siebel CRM Configuration Synchronization Component does not create some of the objects subject to synchronization in Configuration Layer when information is imported from the Siebel environment.	There might be conflicts between existing configuration data and data imported by G*plus* Adapter for Siebel CRM Configuration Synchronization Component from Siebel to Genesys. For example, if an agent with the user name `user1` is imported by the Configuration Synchronization Component and there is a person (not an agent) with the same user name in Configuration Manager, the Configuration Synchronization Component will not be able to successfully complete the import function and will produce an error message in its log. Check the log of the Configuration Synchronization Component for error messages and use Configuration Manager to correct any conflicts. Then import the affected objects.
After making changes to objects imported by G*plus* Adapter for Siebel CRM Configuration Synchronization Component into Configuration Layer and then importing the affected objects from Siebel once again, there are discrepancies between configuration data in Siebel and Genesys environments.	Any voluntary changes made to the data in Configuration Manager where G*plus* Adapter for Siebel CRM Configuration Synchronization Component stores agent data may cause data synchronization scenarios to fail. This may cause discrepancies between configuration data in Siebel and Genesys applications. For example, if an agent with user name `user1`, which was previously imported by the Configuration Synchronization Component, is removed from Configuration Manager and a person (not an agent) with the same user name is created manually in Configuration Manager, if agent `user1` is imported from Siebel again, the Configuration Synchronization Component will fail, producing an error message in its log. Check the log of the Configuration Synchronization Component for error messages and use Configuration Manager to correct any conflicts. Then import the affected objects again.
The error message `Cannot connect to the server` displays in the Siebel Call Center.	Check that G*plus* Adapter for Siebel CRM Configuration Synchronization Component is running. Normally, it should be running whenever agent data is updated within Siebel. If the Configuration Synchronization Component is running and you still get this error, there might be network problems preventing Siebel Server from successfully connecting to the Configuration Synchronization Component. To solve the problem, restore network connectivity.
Problem: Does not reconnect to T-server.	Change ADDP timeout parameter.

Table 6: Problems and Solutions (Continued)

Problem Description	Solution
Upon accepting Genesys E-mail, instead of E-mail view, Siebel displays an Error Message view with fhe tollowing error message: `Cannot connect to the server(SBL-EAI-04115)`	Check that the UCS Gateway is running, and that the corresponding outbound web service wass imported and contains the correct URL pointing to the UCS Gateway.
When browsing the Standard Response Library, Siebel shows "`Applet: Genesys CategoryStructureDataEx(MCR) does not have the Base template file specified.(SBL-UIF-00266)`" error message.	Using Siebel Tools, check for the existence of the "`Applet Form Grid Layout`" template. Create it manually if needed (see the *G*plus *Adapter 7.5 for Siebel CRM Deployment Guide* for details).
After creation of a new Siebel configuration with both G*plus* Voice and G*plus* OpenMedia profiles, *or* any changes made in either profile, agent login to the Siebel Server displays an Error Message: "`Unable to create a Driver object from driver GenCommDrv with Media-Type-String GPlus CTI Driver(SBL-CSR-00500).`"	Check that both profiles, (G*plus* Voice and G*plus* OpenMedia) in the Siebel configuration are configured in accordance with the Deployment Guide. If the configuration defines both profiles, but one of these profiles has been configured with errors, then the driver instances for both G*plus* Voice and G*plus* OpenMedia are not created and Siebel displays this error.
If an agent logs in to Siebel when the G*plus* Communication Server has not yet been started, the Siebel Toolbar is inaccessible for this agent.	Log out of Siebel and make sure that the G*plus* Communication Server is started, then log in to Siebel again.
For e-mail transfer in Siebel 7.5.3: Siebel 7.5.3 does not automatically save the current applet when the Communication toolbar is selected. This may cause undefined behavior. For a detailed explanation, please refer to Oracle Service Request #: 38-2989109267 on the Oracle support site.	This issue is resolved in later (post-7.5.3) versions of Siebel. For a workaround for Siebel 7.5.3 please refer to Oracle Service Request #: 38-2989109267 on the Oracle support site.

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