Gplus Adapter 8.0

for Siebel CRM

User's Guide

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Preface

Welcome to the *G*plus *Adapter 8.0 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 8.0 for Siebel CRM is a software solution that provides seamless integration between Siebel CRM and Genesys 8 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 8.0 for Siebel CRM Deployment Guide*.

This document is valid only for the 8.0 release of this product.

Note: For versions of this document created for other releases of this product, visit the Genesys Documentation website, or request the Documentation Library DVD, which you can order by e-mail from Genesys Order Management at orderman@genesys.com.

This preface contains the following sections:

For information about related resources and about the conventions that are used in this document, see the supplementary material starting on page 191.

About G*plus* Adapter 8.0 for Siebel CRM

The G*plus* Adapter 8.0 for Siebel CRM is a software solution that provides seamless integration between Siebel CRM and Genesys 8.0 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.

Intended Audience

This document is primarily intended for system administrators or other individuals who install and configure the G*plus* Adapter. It has been written with the assumption that you have a basic understanding of:

- Computer-telephony integration (CTI) concepts, processes, terminology, and applications.
- TCP/IP Internet working fundamentals including routing and client/server application communications via TCP sockets.
- Basic conceptual understanding of database systems, including SQL commands necessary to validate availability of your company's database environment. You should involve your company's DBA resources during the implementation of this project.
- The network configurations used in your company's computing environment.

You should also be familiar with the following Genesys solutions:

- Framework
- Universal Routing
- Outbound Contact Solution
- eServices (formerly Multimedia)

Note: Refer to the Genesys Interoperability Guide for further information about the appropriate Genesys Applications version numbers.

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Document Change History

This section lists content that is new or that has changed significantly since the first release of this document. The most recent changes appear first.

New in Document Version v8.0.201.00

This document has been re-issued to support the G*plus* Adapter for Siebel CRM release 8.0.2. The following topics have been added or changed since the previous release of the document:

- The `CampSynch Configuration` object is enhanced with the following fields: `Campaign Folder`, `Calling List Folder`, and `Table Access Folder`. See Table 1, "The Columns of the Synchronization Server Applet," on page 46.
- Section "Campaign Synchronization" on page 28 has been revised.
- Web callback is no longer supported.

New in Document Version v8.0.102.00

This document has been re-issued to support the G*plus* Adapter for Siebel CRM release 8.0.110. The following topics have been added or changed since the previous release of the document:

- A new section, "Navigating to the Current Work Item View" on page 103, is added.
- "Working with the Chat Client" on page 110 is updated to include new details about typing notifications.
- "Transferring Genesys E-Mail and Chat Interactions" on page 116 is updated to include specific transfer procedures for Siebel versions 8.1.1.11/8.2.2.4 or later.

New in Document Version v8.0.101.00

This document has been re-issued to support the G*plus* Adapter for Siebel CRM release 8.0.1. The following topics have been added or changed since the previous release of the document:

- A new subsection, "Release 8.0.101.00" on page 14, summarizes the feature enhancements that the 8.0.1 version of the G*plus* Adapter for Siebel CRM Campaign Synchronization Component provides.
- A new chapter, Chapter 3, "Campaign Synchronization Component Information," on page 33, summarizes the functionality that the 8.0.1 version of the G*plus* Adapter for Siebel CRM Campaign Synchronization Component provides.

See the *G*plus *Adapter for Siebel CRM Deployment Guide* for further details about the Siebel waves campaign management feature. Also, refer to the *G*plus *Adapter for Siebel CRM Developer's Guide* for details on customizable solutions.

New in Document Version v8.0.001.00

Supported software versions have been updated throughout the document. Otherwise, there have been no significant changes to this document since the last release.

Chapter

1 Introduction

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

New in This Release

This section contains a brief description of the new features in the G*plus* Adapter for Siebel CRM 8.0.x releases.

Release 8.0.2

Several enhancements are implemented in this release of the G*plus* Adapter for Siebel CRM. Refer to the following new component-specific features:

- Support for the Siebel Chat UI. (See your Siebel documentation for more information.)
- Support for Siebel versions 8.1.1.14/8.2.2.14 (IP2014) and later for both HI and Open UI modes.
- Support for Genesys Framework 8.5.
- Support for Multiple Phone Numbers by Phone Type.
- Support for SIP Business Continuity.
- Support for Siebel Hoteling (Free Seating).
- The `CampSynch Configuration` object is enhanced with the following fields: `Campaign Folder`, `Calling List Folder`, and `Table Access Folder`.
- The communication protocol between the server and driver is improved. (Now, the transport protocol Bidirectional-streams Over Synchronous HTTP, or BOSH, is used. See http://xmpp.org/extensions/xep-0124.html.)

Release 8.0.102.00

Several enhancements are implemented in this release of the G*plus* Adapter for Siebel CRM. Refer to the following new component-specific features:

- Support for Siebel versions 8.1.1.11/8.2.2.4 and later with both HI and Open UI modes.
- Support for Chat user typing notifications.

Release 8.0.101.00

Several enhancements have been implemented in this release of the G*plus* Adapter for Siebel CRM. Refer to the following new component-specific features:

G*plus* Adapter for Siebel CRM Campaign Synchronization Component

- Support for the Siebel waves campaign management feature, which means that instead of mapping (synchronizing) the Siebel calling lists to the Genesys calling lists, the Siebel campaign waves are now mapped to the Genesys calling lists.
- Support for the synchronization of multiple parallel campaigns, including single or multiple-tenants.
- Improved synchronization algorithms to achieve better performance.
- The communication between Siebel and the `Gplus` Adapter Campaign Synchronization Server is now unidirectional.

Release 8.0.001.00

Several enhancements have been implemented in this release of the G*plus* Adapter for Siebel CRM. Refer to the following new component-specific features:

G*plus* Communication Server for Siebel CRM

- Support for multimedia fail over processing for G*plus* Adapter.
- Support for `Check DN on login` feature. This features does not allow an agent to sign in to Siebel, or to login to Genesys on a DN (or place) that is already occupied.

Outbound Campaign Feature

- Support for the Outbound Campaign `Push Preview` mode.

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:

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 Call 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 4, "Agent Information," on page 77 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 Voice Callback 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 the `Person` object/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 on page 19).

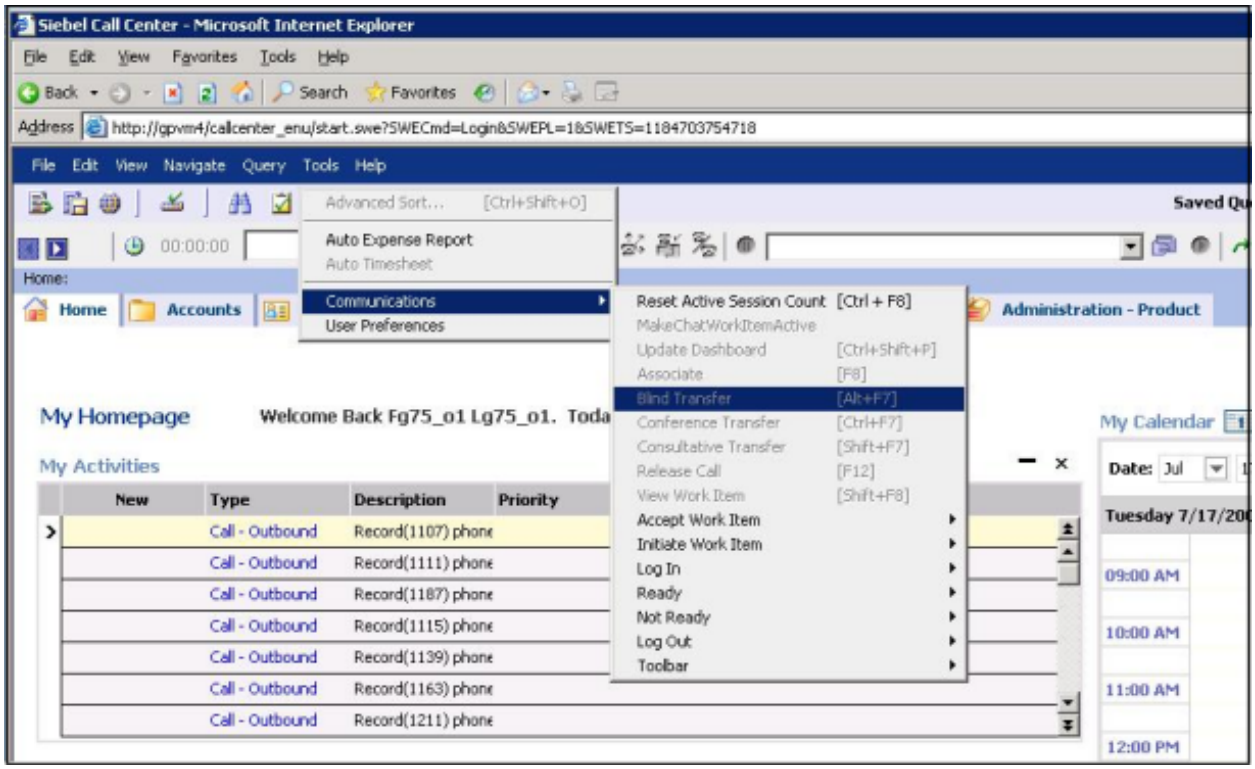

Figure 1: Communication Commands from the View Menu

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 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.

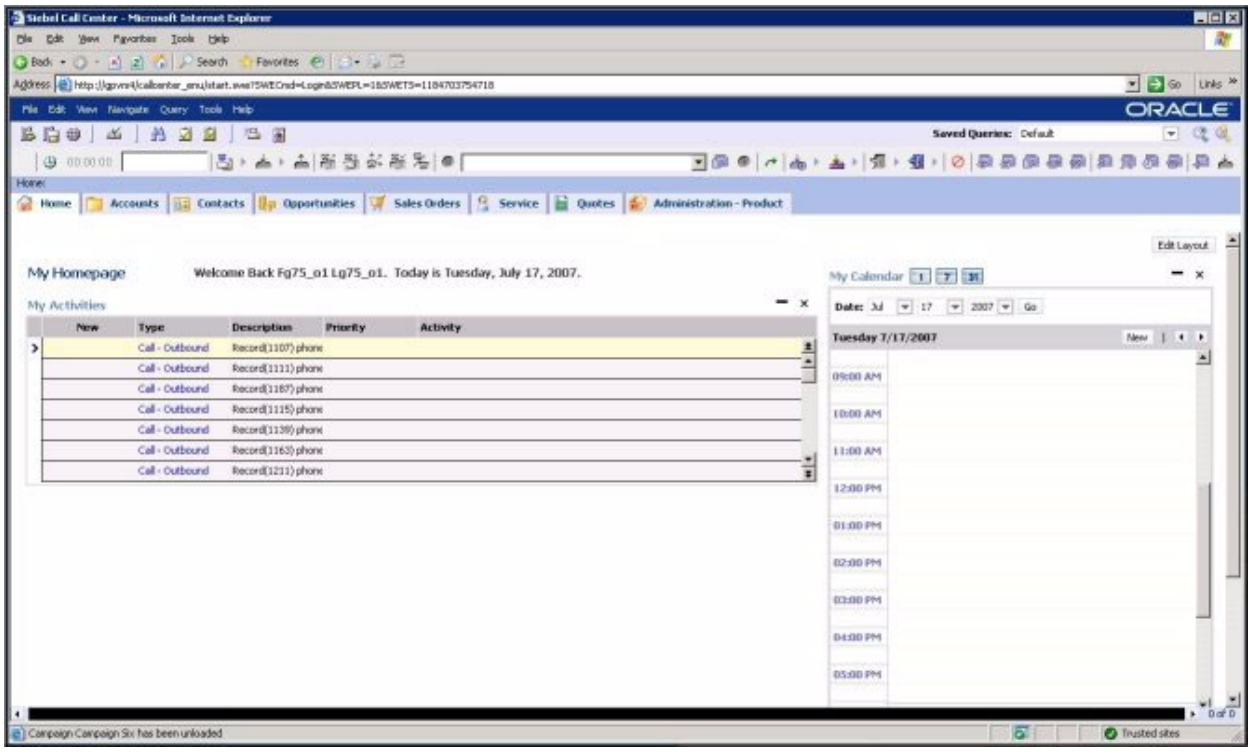

Figure 2: Siebel Call Center After Login but Before Call Received

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 21).

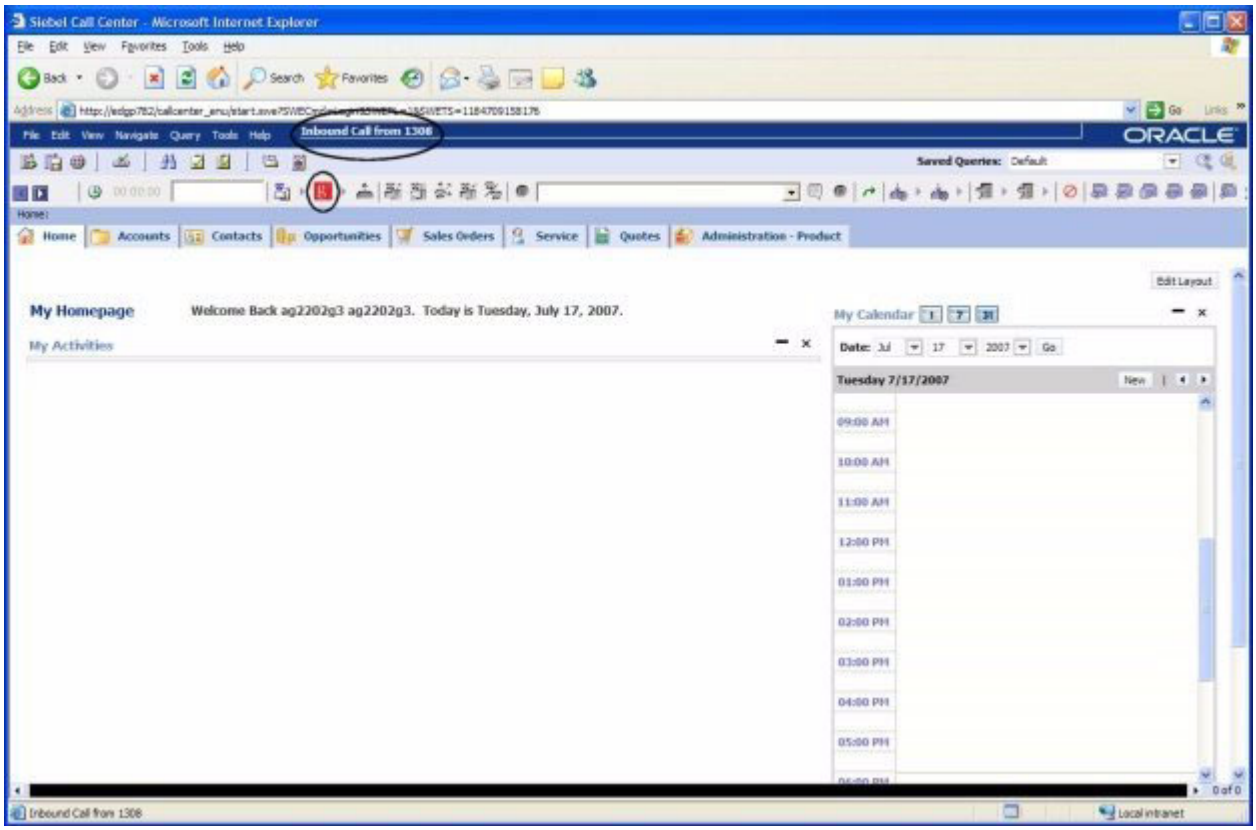

Figure 3: Siebel Call Center, Call Arrived

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 22).

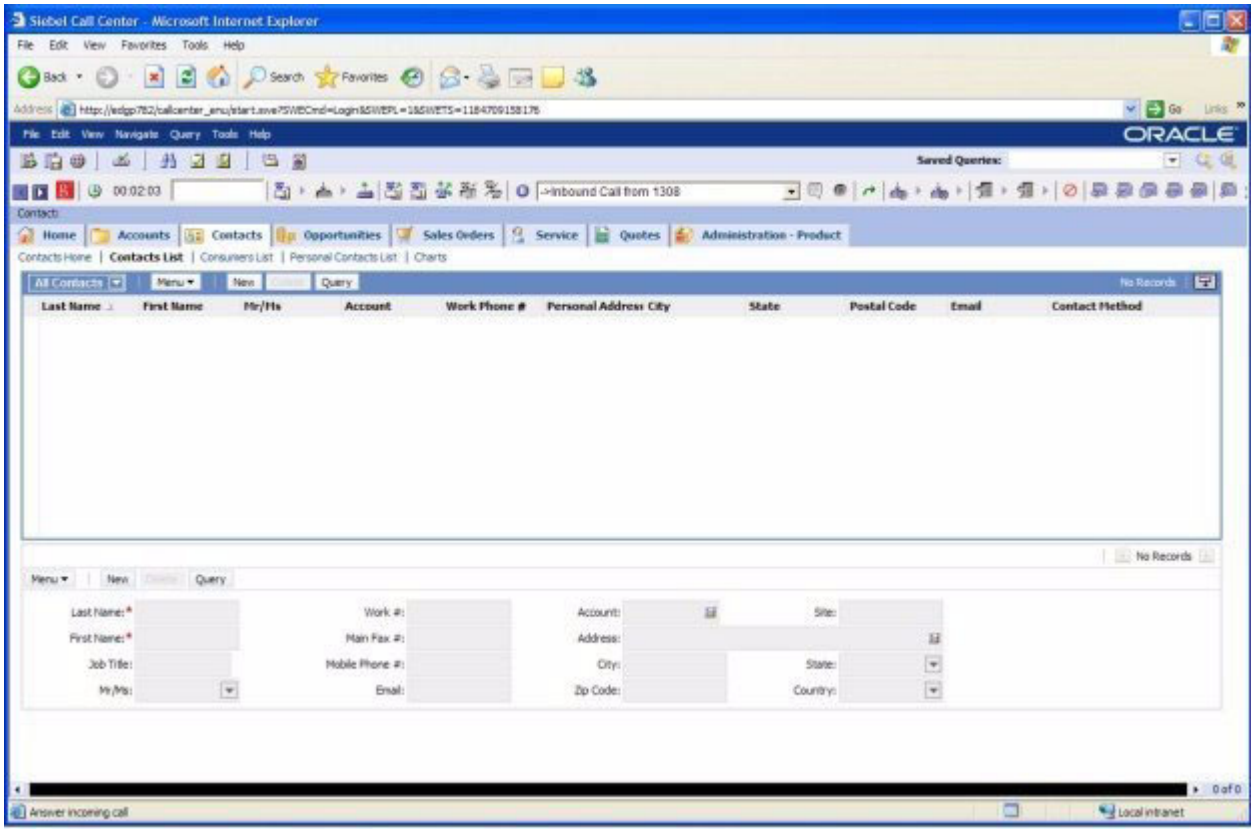

Figure 4: Siebel Call Center, Agent on Call

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 system. It functions within the context of the Voice and Multimedia (for `Push Preview` dialing mode) Components and implements the Outbound Contact desktop functionality to facilitate outbound campaign activities.

Each incoming Outbound Contact Server (OCS) interaction (for example—a `Preview` record or an outbound phone call) initiates a Campaign Overview screen popup in the Siebel desktop application.

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

An extension of the current G*plus* Voice and Multimedia (for `Push Preview` dialing mode) Components enables agents to process outbound calls from OCS.

Universal Callback Feature

The Universal Callback feature is used with the Voice Component to provide Voice 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 the 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 through 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 through 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 26 shows the desktop of an agent working on a reply.

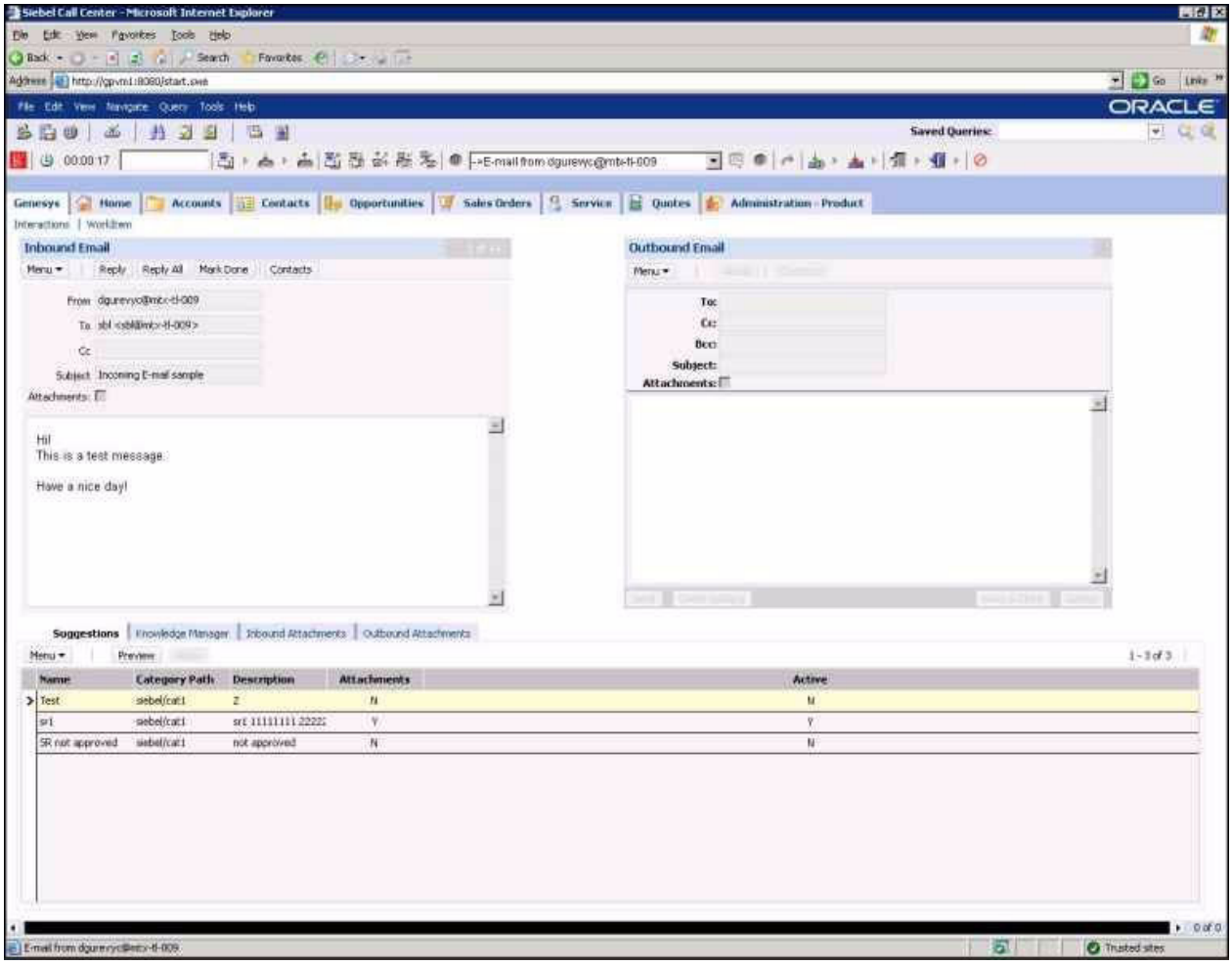

Figure 6: Siebel Call Center for Inbound E-Mail

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 8.0 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.

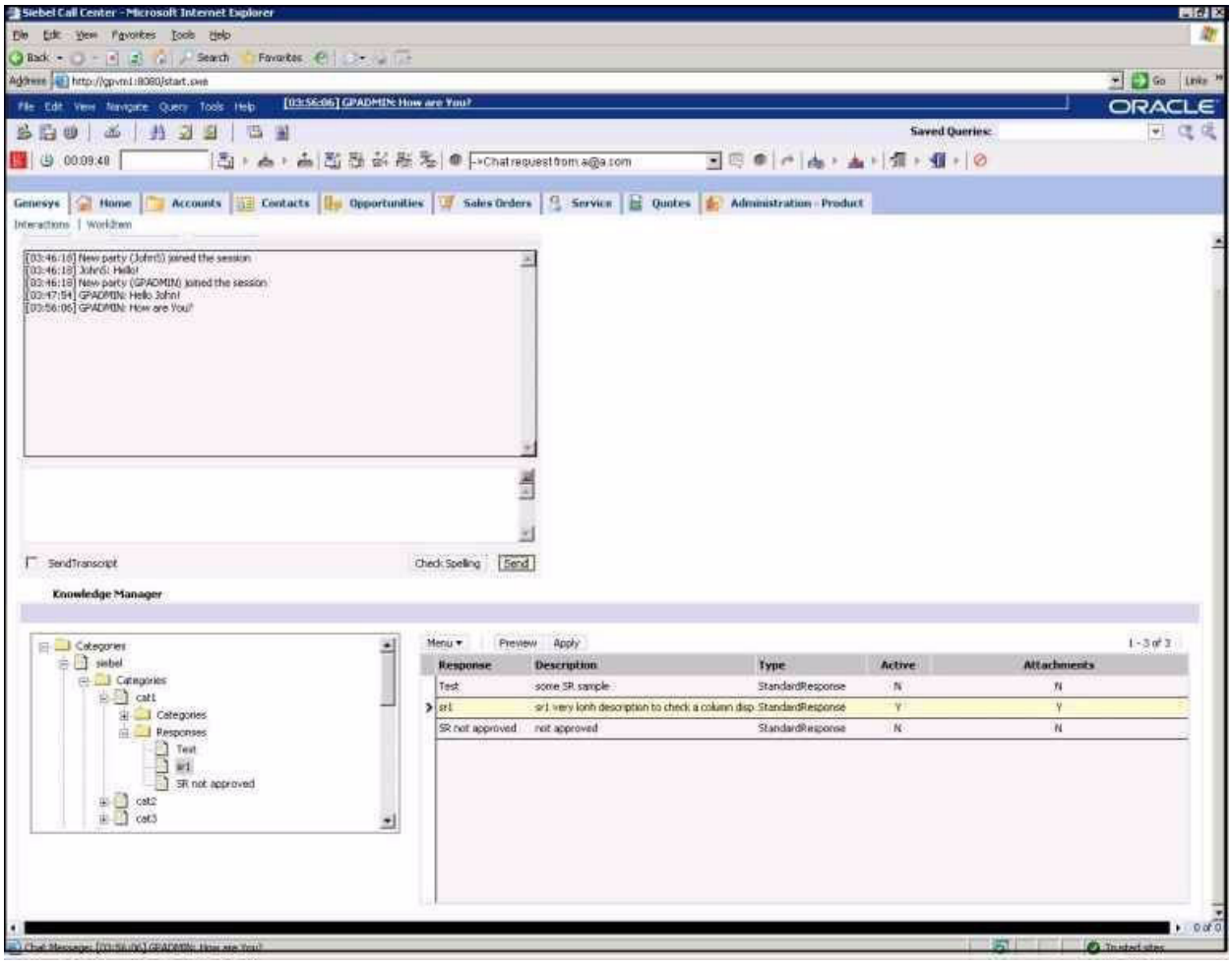

Figure 7: Agent's Chat Screen

Configuration Synchronization

G*plus* Adapter for Siebel CRM enables Siebel configuration changes to be dynamically communicated to Genesys through "listener" services in real time. The specific changes are automatically updated in the Genesys Configuration Layer when detected. Figure 8 on page 28 shows a diagram of the process.

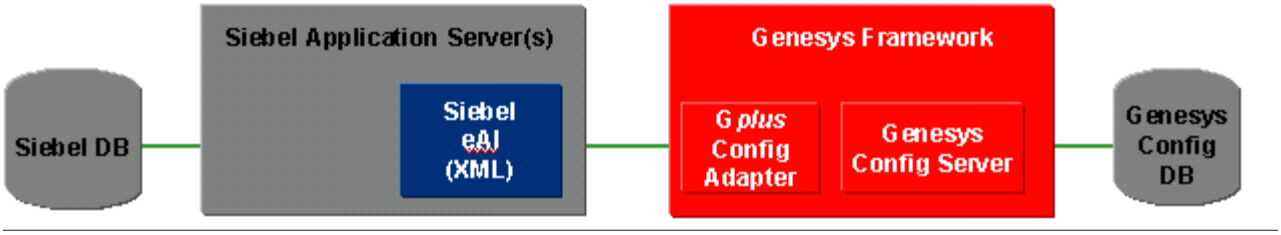

Figure 8: Configuration Synchronization

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 5, "Information for Administrators," on page 129.

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.

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 `Batch` and `Delta (real-time)` modes.
- Open synchronization interface.
- `Warm standby` mode redundancy support for Genesys Configuration Server.
- `Warm standby` mode redundancy support for Genesys DB Server.
- Updates of Genesys `Do Not Call` fields based on either Customer ID or phone numbers.
- `Warm standby` mode redundancy 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:

- `Delta (real-time)`
- `Batch`

Refer to “The Principles of the Data Flow” on page 36.

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 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 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 for Siebel CRM Deployment Guide*.

Chapter

3 Campaign Synchronization Component Information

This chapter explains how to manage the campaign synchronization process using the 8.0.1 or later version of the G*plus* Adapter for Siebel CRM Campaign Synchronization Component. It is designed for Siebel outbound campaign managers/supervisors, who are responsible for the campaign synchronization to Genesys.

This chapter covers the following topics:

Overview

The 8.0.1 or later version of the G*plus* Campaign Synchronization Component represents a fully re-designed solution. The main difference from previous releases is the support for the Siebel Waves. The 8.0.1 or later version synchronizes the Siebel Campaign Waves (the terms *Siebel waves* or simply *waves* are used in this chapter) into the Genesys Calling Lists in contrast to the previous versions where the Siebel Calling Lists were synchronized into the Genesys Calling Lists. This new approach makes the Siebel campaign processing model closer to the Genesys one. It specifically means that the Genesys Outbound Contact Solution is now able to accurately process (dial) the contacts belonging to the launched waves on the Siebel side.

Additionally, the 8.0.1 release and later supports a different communication model between the Siebel Server and Genesys Campaign Synchronization Server; the new communication model is unidirectional in contrast to the bidirectional communication model from the previous release. Now, the Siebel

Server works only as a client and the Campaign Synchronization Server works as the server.

This new solution also supports parallel campaign synchronization and has a significantly improved performance. This solution also provides a Siebel side GUI that simplifies the configuration and monitoring of the synchronization process.

The Conceptual Schema Overview

This section describes the conceptual schema of the new campaign synchronization process and is divided into the following sub-sections:

The General Conceptual Schema

The section describes the principal schema of this new solution and contains the following subsections:

The Siebel Side to the Genesys Side Objects Mapping and Naming Conventions

This section describes the synchronization data mapping and the naming conventions used during the process.

The synchronization data mapping is illustrated in Figure 9 on page 35.

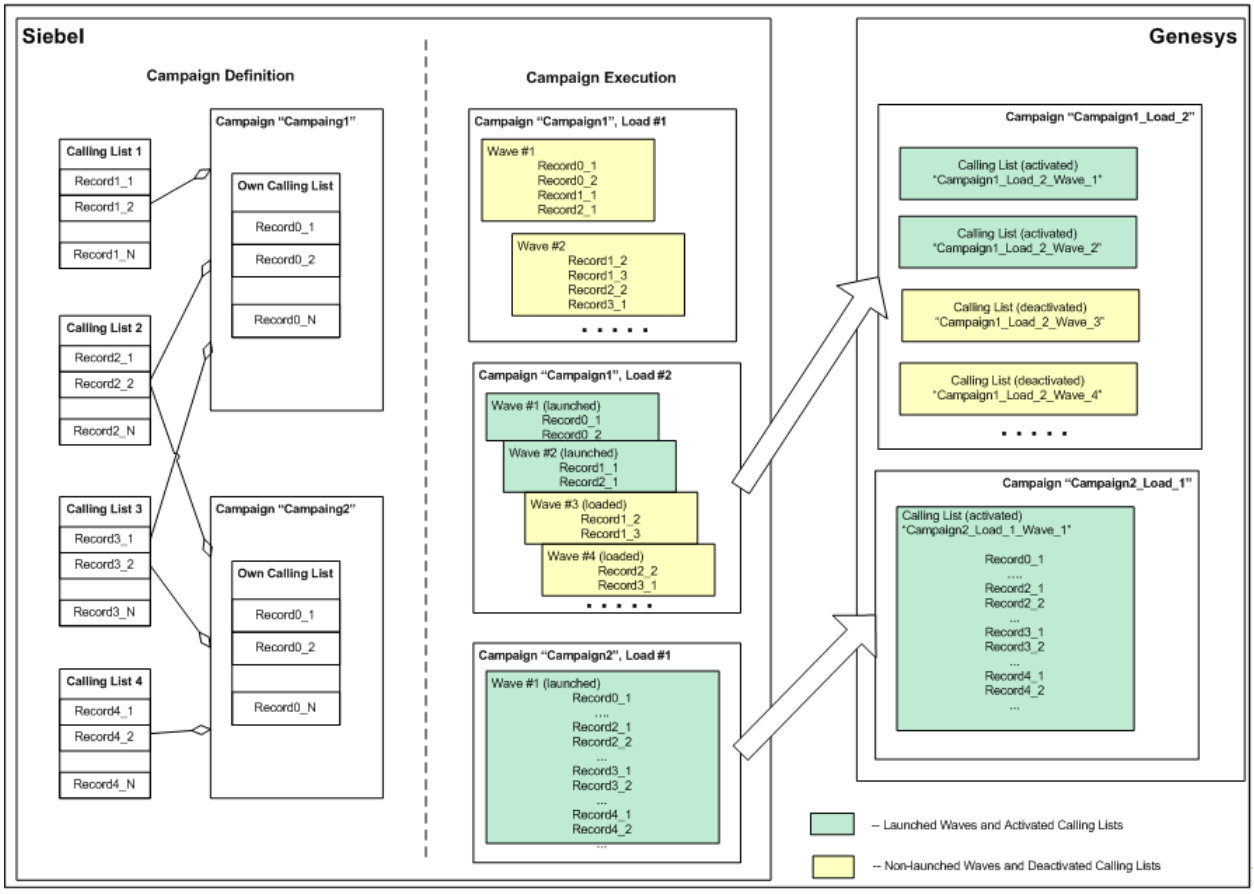

Figure 9: The Siebel to Genesys Objects Mapping and Naming Conventions

The Siebel model of the outbound campaign processing is a two-step procedure consisting of the following steps:

- campaign definition
- campaign execution.

During the campaign definition phase, the following actions are usually performed:

- The calling lists are created.
- The campaigns are created.
- The calling lists are assigned to the campaigns.

During the campaign execution phase, the campaigns are loaded for processing. When a campaign is loaded, the contacts associated with it are split into the waves according to the corresponding wave settings. The waves are not identical to the Calling Lists and, usually, the contacts distribution between the waves and the Calling Lists within a campaign is different. The waves within a campaign can be launched separately. Also, they can be suspended and then re-launched again.

The Siebel campaigns can be loaded several times. Each time a new campaign is loaded means that the new campaign is processed from the beginning—for example, all associated contacts should be dialed again.

According to this model the Campaign Synchronization Component implements the following data mapping from Siebel to Genesys:

- The Siebel campaign loads are synchronized to the Genesys campaigns.
- The Siebel campaign load waves are synchronized to the Genesys Calling Lists. They are assigned to the Genesys campaign that corresponds to a particular, previously synchronized Siebel campaign load.

The synchronization is performed using the following naming rules:

Siebel Campaign Loads

- The Siebel campaign loads are mapped to the Genesys campaign named as follows: `<Siebel Campaign Name>_Load_<Load #>`.

  For example, the `Load #2` of the Siebel campaign named, `MyCampaign7`, is synchronized to the Genesys campaign named, `MyCampaign7_Load_2`.

Siebel Waves

- The Siebel waves are mapped to the Genesys Calling Lists named, `<Siebel Campaign Name>_Load_<Load #>_Wave_<Wave #>`.

  For example, the `Wave #5` of the `Load #2` of the Siebel campaign named, `MyCampaign7`, is synchronized to the Genesys Calling List named, `MyCampaign7_Load_2_Wave_5`.

The Genesys Outbound Solution supports the runtime activation and deactivation of the calling lists within a particular campaign. The Outbound server only processes the activated calling lists.

The Campaign Synchronization Component synchronizes the launched Siebel waves to the activated Genesys Calling Lists and the non-launched waves to the deactivated ones. This method of synchronization allows the Genesys Outbound Solution to process only those contacts that correspond to the launched waves on the Siebel side.

Each Siebel contact can be represented as several Genesys Outbound contact records within a Genesys Calling List. This transpires because a single Genesys Outbound contact record can only contain a single phone number, but a single Siebel contact can contain multiple phone numbers.

The Principles of the Data Flow

The schema of the Campaign Synchronization Component's principles of the data flow is illustrated in Figure 10 on page 37.

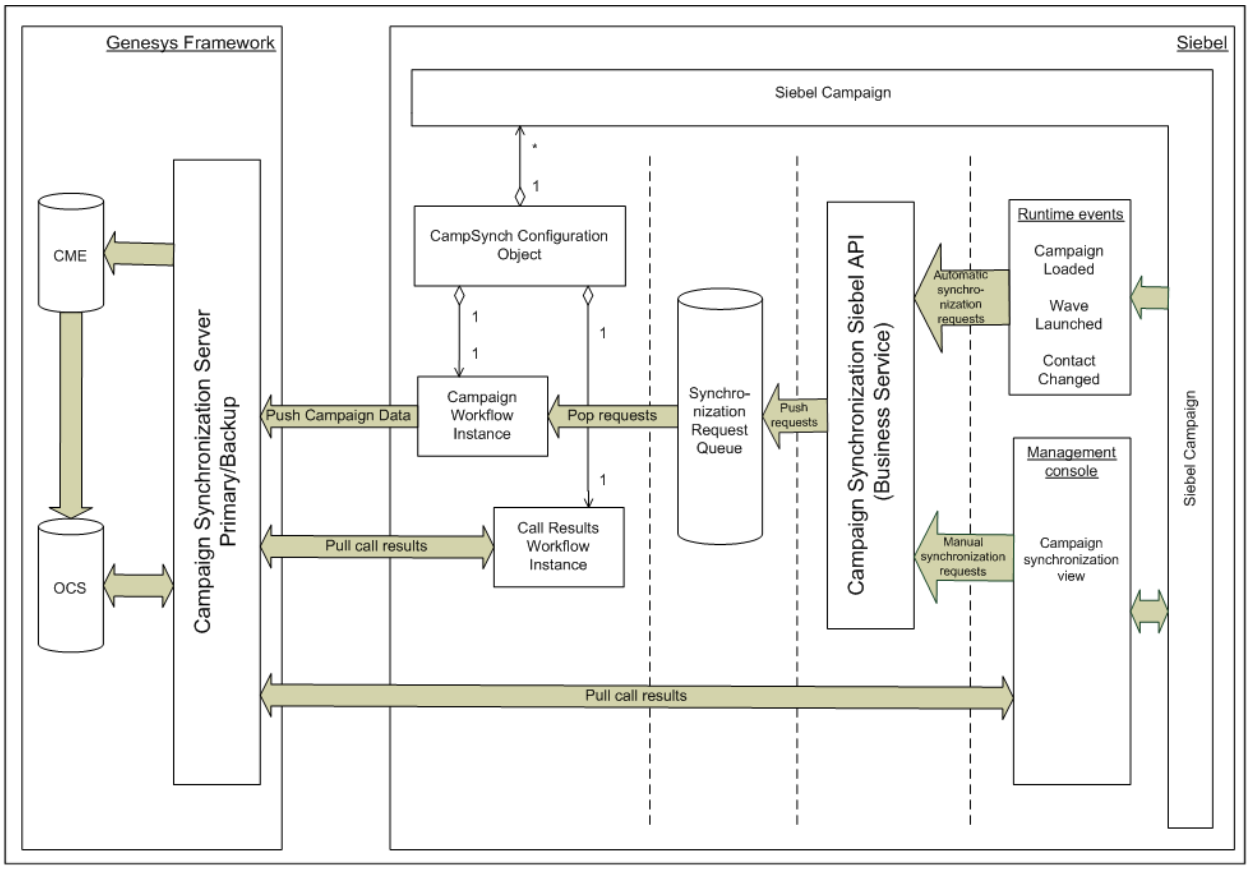

Figure 10: The Schema of the Campaign Synchronization Process Principles

The Campaign Synchronization Server is a standalone Genesys application (in scope of the solution) that is designed to receive data from the Siebel side and perform the required actions (add, modify, delete, and query data) on the Genesys Configuration Database and the Genesys Outbound Database.

According to the new design, the Campaign Synchronization Server defines the synchronization target (Tenant, Configuration, and Outbound Databases). Therefore, the Campaign Synchronization Server must be associated with a single Tenant and must have a single connection to OCS (Outbound Contact Server). The current implementation uses the Configuration Server (and the Configuration Database as a result), which it is initially connected to at the start.

Therefore, for example, if it is required to synchronize different Siebel Campaigns to different Genesys Outbound Solutions, it is necessary to deploy several Campaign Synchronization Server applications, set them up to connect to different OCS servers (OCS databases), and then direct the synchronization process of the Siebel campaigns to the corresponding Campaign Synchronization Server. No other mappings, for example, mapping the Siebel Organization to a Genesys Tenant, are available in the current solution.

On the Siebel side, each Campaign Synchronization Server must be represented by a special configuration record that is named, `CampSynch Configuration` object. This record (object) stores the information, such as URLs, to the primary and backup Campaign Synchronization Server and other options (see, Procedure: Creating a CampSynch Configuration object, on page 70 for more details about the options).

Each Siebel campaign that is required to be synchronized must be associated with a particular `CampSynch Configuration` object. This object determines a synchronization target for a particular Siebel campaign. See, Procedure: Linking a campaign to a CampSynch Configuration object, on page 71 for more details.

This solution has the following three types of requests from the Siebel side to the Campaign Synchronization Server:

- The campaign data synchronization requests. In these requests, the data flows in the direction of the Siebel environment to the Genesys environment.
- The requests for call result updates (also known as the call results delta). In these requests, the data flows in the direction of the Genesys environment to the Siebel environment.
- The requests for call results for the entire campaign, the entire wave, or a particular contact. In these requests, the data flows in the direction of the Genesys environment to the Siebel environment.

The requests of each of these types have a different data flow within the Siebel application.

The requests for campaign data synchronization are generated either by the Siebel runtime event handlers, or by manual operations preformed through the Management Console (GUI). These requests are then stored in a special area, called the synchronization request queue, or simply, the request queue. They are sent to the Campaign Synchronization Server(s) using a special Siebel workflow process instance(s) named the campaign workflow. See the section, “The Synchronization from the Siebel Side to the Genesys Side” on page 39 for more details.

The requests for call result updates are generated and sent by different Siebel workflow process instance(s) named the call results workflow. See the section, “The Synchronization from the Genesys Side to the Siebel Side” on page 40 for more details.

Other requests are generated and sent to the Campaign Synchronization Server(s) manually through the Management Console.

The Synchronization Request Queue Component

To provide consistent high-quality data, a specific component named the synchronization request queue is used (as in previous releases). This queue allows for the storage of synchronization requests for a long period of time and processes them when the Campaign Synchronization Server becomes

accessible. Requests from this queue are processed as soon as the campaign workflow process instance is running and the connection to the Campaign Synchronization Server is available.

After a successful request execution, the request is removed from the queue. If a request fails with an unrecoverable error, it is kept in the queue, it is marked as failed, and it is updated with an error description. Furthermore, the agents, who are responsible for the campaign synchronization, are able to manually delete the failed requests from the queue after the corresponding analysis.

If a request fails with a recoverable error—for example, a Campaign Synchronization Server outage or any required Genesys server outage, the request is kept in the queue, it is updated with an error description, and it is kept in the ready-to-execute state. This request is then processed until it is successfully executed or it fails with an unrecoverable error.

This section contains the following subsections:

The Synchronization from the Siebel Side to the Genesys Side

On the Siebel side, a special Siebel workflow process (named campaign workflow) is responsible for sending the data synchronization requests to the Campaign Synchronization Server. A separate workflow process instance runs for each `CampSynch Configuration` object and it processes those exact requests from the queue to which it corresponds.

In brief, the campaign workflow implements the following algorithm when communicating with the Campaign Synchronization Server:

1. Checks to see if an appropriate request is present in the queue.
2. If no request is found, then it sleeps for the configured `No Data Timeout` time interval.
3. If a request is found, then it attempts to send it to the Campaign Synchronization Server (primary or backup).
4. If a request is processed successfully, then it remove the request from the queue and proceeds with step 1.
5. If a request is processed with an unrecoverable error, then it marks the request as failed and proceeds with step 1.
6. If a request is processed with a recoverable error, then it sleeps for the configured `Retry Timeout` time interval, and proceeds with step 1 (this means that it tries to re-execute the same request).
7. If a request is processed with a critical error, then it exits (stops the workflow process instance).

Actually, this algorithm implements an endless loop that processes the available requests and waits for the new ones. It is processed until the workflow instance is running.

The Request Processing Order

There is a certain order in which the requests can be processed. This algorithm supports the following three different types of request processing orders that are configured for each `CampSynch Configuration` object:

1. Original: the requests are processed in the order that they were placed into the queue. Therefore, if several campaigns are synchronized simultaneously, the synchronization of all of the campaigns is completed approximately at the same time.
2. Campaign: after the first record that belongs to a particular campaign is processed, all of the records that belong to that campaign are processed first. Therefore, if several campaigns are synchronized simultaneously, they are completed one-by-one.
3. Priority: similar to the `Campaign` type, but the first record is selected according to priority.

This workflow process instance can be started or stopped at any time. It allows a flexible synchronization process setup—for example, performing the synchronization only during the night. Starting or stopping the workflow instance for a specific `CampSynch Configuration` object can be done independently for other `CampSynch Configuration` objects and, independently, for the second (call results workflow) workflow process to which it belongs.

The out-of-the-box solution provides a way to start and stop the workflow process instances manually by using the Management Console; but, for example, the solution can be customized to start and stop the workflow by using a scheduler.

The Synchronization from the Genesys Side to the Siebel Side

The information about the call results and call attempts can be requested from the Genesys Outbound Contact Solution and stored on the Siebel side. This data can be synchronized in the following two different, separate approaches:

1. Requests for the call results and the number of call attempts for a whole campaign load, a specific wave, or a single contact can be requested
2. Requests for the runtime updates for the call results and the number of call attempts (the call results and the number of call attempts delta) concerning all campaigns that are synchronized using a specific `CampSynch Configuration` object.

Batch mode processing is available for the runtime event updates of the call results. When the batch mode processing is turned on, all of the previously processed records are queried from the Genesys Outbound Contact Database for call results during the very first request processing, and then this data is sent with a response to the Siebel side.

The out-of-the-box solution provides a way to manually perform the requests with the first approach by using the Management Console; but the solution can be customized to run the requests from the Siebel runtime event handler when the campaign load or the wave is processed.

To periodically request the call result updates, a special Siebel workflow process (named call results workflow) is used. A separate workflow process instance runs for each `CampSynch Configuration` object.

In brief, the call results workflow implements the following algorithm when communicating with the Campaign Synchronization Server:

1. Requests an update for the call results and the number of call attempts.
2. If a request is processed and the update is received, then store the data, sleep for the configured `Query Timeout` time interval, and proceed with step 1.
3. If a request is processed with an unrecoverable error, then sleep for the configured `Query Timeout` time interval and proceed with step 1.
4. If a request is processed with a recoverable error, then sleep for the configured `Retry Timeout` time interval, and proceed with step 1.
5. If a request is processed with a critical error, then exit (stop the workflow process instance).

Actually, this algorithm implements an endless loop which queries the call result updates while the workflow instance is running.

The Campaign Synchronization Server receives the information about the call results for the requested campaigns from Outbound Contact Server (OCS) and collects it. The Campaign Synchronization Server sends the collected data as a response for the requests that periodically come from the Siebel side.

Note: The approach of requesting the updates (delta) for the call results cannot guarantee absolute data consistency because the Campaign Synchronization Server that collects the updates from OCS can lose them due to switchovers or failures. The only way to ensure that all of the call results are synchronized is to use the first approach—request the call results data for the entire campaign or calling list. Note that the amount of received data, especially when the call results for the entire campaign are requested, may be extremely large and its processing may take a while.

This workflow process instance can be started or stopped at any time. Starting or stopping the workflow instance for a certain `CampSynch Configuration` object can be done independently for other `CampSynch Configuration` objects and for the second (campaign workflow) workflow process to which it belongs.

The out-of-the-box solution provides a way to start and stop the workflow process instances manually by using the Management Console; but, for

example, the solution can be customized to start and stop the workflow by using a scheduler.

The Synchronization of Parallel Campaigns

This solution allows flexible, configurable parallel campaign synchronization.

The parallel synchronization execution can be used for the synchronization to different Genesys Outbound Solutions, or to a single Genesys Outbound Solution.

For the parallel synchronization to different Outbound Solutions, you must set up multiple Campaign Synchronization Servers (and set up multiple `CampSynch Configuration` objects, as a result) directed to each target.

For the parallel synchronization to a single Outbound Solution, you must set up either multiple Campaign Synchronization Servers (and set up multiple `CampSynch Configuration` objects, as a result) directed to a single target, or set up multiple `CampSynch Configuration` objects directed to the same Campaign Synchronization Server.

The principles of parallel campaign synchronization are illustrated in Figure 11:

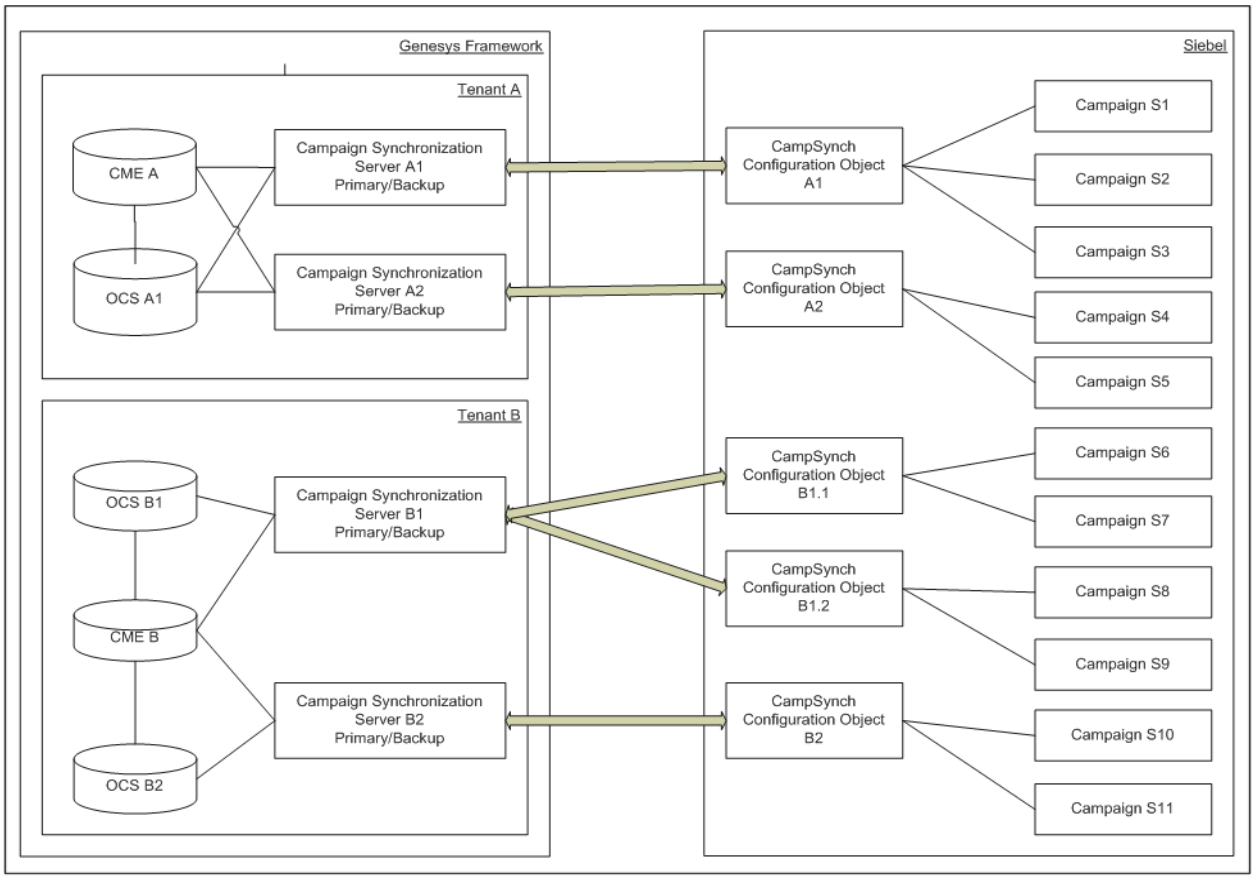

Figure 11: The Principals of Parallel Campaign Synchronization

The Synchronization Modes

The three following synchronization modes are available for your campaigns:

- Full: The entire campaign data, including all of the waves (Campaign, Format, Table Access, and Calling Lists on the Genesys side) is synchronized when the Siebel campaign is loaded or when it is enabled for synchronization. The launched waves are synchronized to the activated Calling Lists; the loaded waves are synchronized to the deactivated Calling Lists. Afterwards, when a wave is launched, it is simply activated on the Genesys side.
- Incremental: The campaign data without the waves (Campaign, Format, Table Access, only on the Genesys side) is synchronized when the Siebel campaign is loaded. The waves are synchronized only when they are launched on the Siebel side. If a campaign is enabled for synchronization when it is already loaded and partially launched, only the launched waves are synchronized at that time.
- Manual: Either the `CampSynch` configuration object or the waves are synchronized by a manual request from the Siebel environment (through the Management Console). This manual operation is also available when the previously automated modes are used (it allows you to repeat the synchronization process, if required).

The `Full` and `Incremental` modes are automatic, which means that the synchronization process is driven by Siebel runtime event handlers. Therefore, if these modes are used, the Campaign Synchronization Component's runtime event handlers must be installed on the Siebel side. See *The G*plus *Adapter for Siebel CRM Deployment Guide* for more details.

If the `Manual` synchronization mode is selected for some of the campaigns, then all of the synchronization operations must be performed manually by using the Management Console.

You must pay special attention to the fact that the mentioned synchronization modes do not determine the behavior related to the deletion of the data from the Genesys side.

The following three deletion-related events can happen with the Siebel campaign:

1. The wave can be suspended.
2. The campaign load can be purged.
3. The campaign can be disabled for synchronization.

There are two possible actions for these events that are provided by the solution:

The campaign/calling lists can be deleted from the Genesys side.

The calling lists can be deactivated only on the Genesys side (the Outbound Contact Solution will stop processing them, but they still exist in the databases.)

You must select the applicable behavior for each of the mentioned events for each synchronized campaign when linking to the `CampSynch Configuration` object. See, Procedure: Linking a campaign to a CampSynch Configuration object, on page 71 for more details.

The Basic Steps of Campaign Synchronization Management

Basically, to set up the campaign synchronization process, you must perform the following general actions:

- Create a synchronization plan—for example, decide which Siebel campaigns should be synchronized to which Genesys Outbound Solutions, which campaigns should be synchronized in parallel, and so on.
- Deploy the required Campaign Synchronization Server(s) on the Genesys side, including the backup servers, if required. See the *The G*plus *Adapter for Siebel CRM Deployment Guide* for more details.
- On the Siebel side, configure the required Server Named Connection Subsystems that point to each Campaign Synchronization Server (primary and backup).
- Configure the `CampSynch Configuration` object(s) that correspond to each Campaign Synchronization Server and run the required workflows.
- Link the Siebel campaigns that should be synchronized with the appropriate `CampSynch Configuration` object(s) and chose the synchronization mode for each of them.
- Enable the synchronization for the chosen Siebel campaign(s). If one of the automatic synchronization modes is selected, the campaign(s) are synchronized without any more additional actions. If the `Manual` synchronization mode is selected, all of the synchronization operations should be initiated manually.

Note: After the campaign is synchronized to Genesys, you must manually finish the configuration using Configuration Manager to make the campaign ready to be loaded into the Genesys Outbound Solution. See the Genesys Outbound Solution documentation for details on how to configure the campaigns.

The Management Console

The Campaign Synchronization Management Console is designed to provide the user interface for setting up and monitoring the campaign synchronization process.

You can use the Management Console to do the following:

- Create the `CampSynch Configuration` objects.
- Link the objects to the Siebel campaigns.
- Enable and disable the synchronization for a particular campaign.
- Start and stop the Siebel workflow processes that are responsible for the synchronization.
- Monitor the synchronization status.
- Monitor the synchronization request queue status.
- View the synchronization summary notes.
- Perform manual synchronization operations.

The views of the Management Console are listed as follows:

- The Servers View, page 45
- The Campaigns View, page 53
- The Supervisory Panel View, page 57
- The Supervisory Panel / Status Detail View, page 57
- The Supervisory Panel / Request Queue Detail View, page 60
- The Supervisory Panel / Summaries Detail View, page 62
- The Request Queue View, page 64
- The Summaries View, page 65

The Servers View

The `Servers` view is designed to provide the following tools to:

- Manage the `CampSynch Configuration` objects (create, modify, and delete them.)
- Configure, start, and stop the workflow process instances that correspond to the `CampSynch Configuration` objects.

The `Servers` view is shown in Figure 12 on page 46.

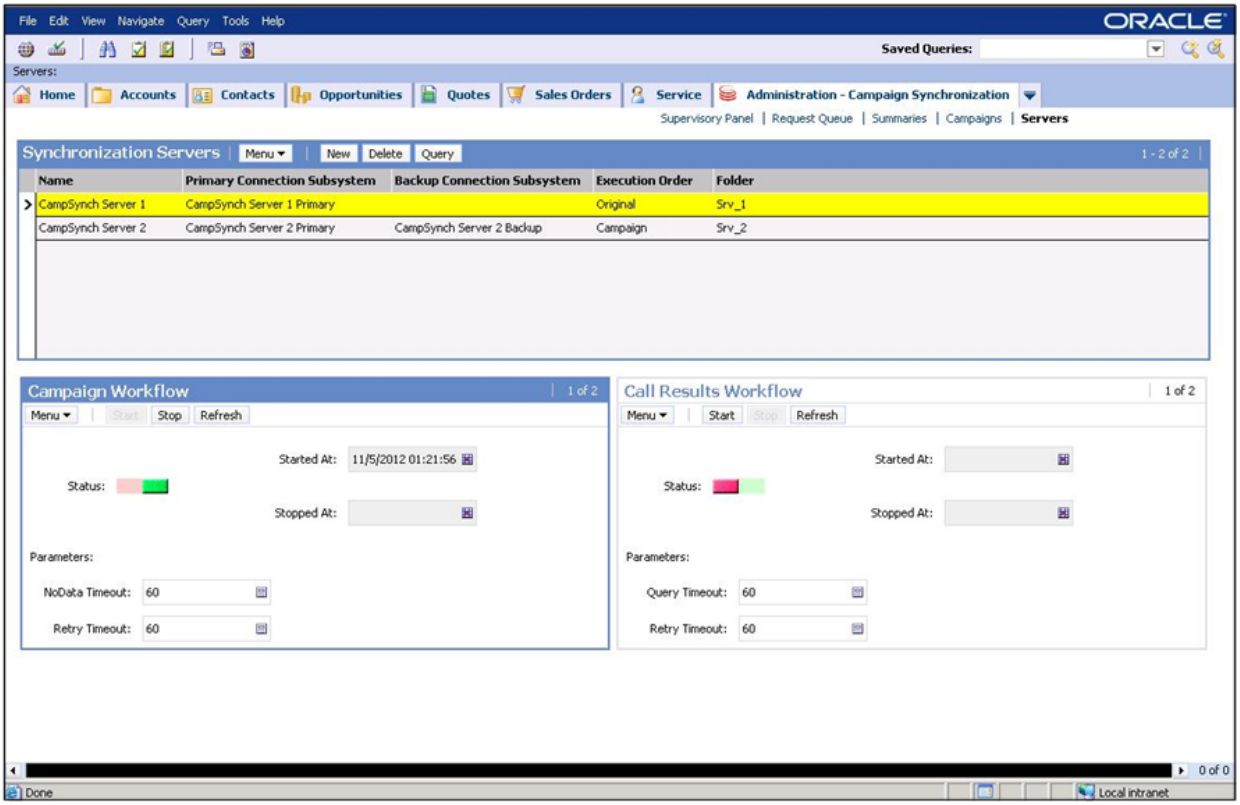

Figure 12: The Servers View

The Synchronization Servers Applet

The `Synchronization Servers` applet is used to create, modify, and delete the `CampSynch Configuration` objects.

Each `CampSynch Configuration` object has the following parameters that are represented by the applet's columns as described in Table 1:

Table 1: The Columns of the Synchronization Server Applet

Column	Type	Data Type	Description	Update Allowed	Comments
Id	Auto generated	String	The Record ID.	Not allowed.	Hidden column. Use the `Columns Displayed` applet's menu item to display this column.
Name	Mandatory	String	The name of the object.	Anytime.	

Table 1: The Columns of the Synchronization Server Applet (Continued)

Column	Type	Data Type	Description	Update Allowed	Comments
Primary Connection Subsystem	Mandatory	String	The name of the primary connection subsystem. Enter the name or use the pop-up pick list applet to choose one.	Anytime. Takes effect immediately.	
Backup Connection Subsystem	Optional	String	The name of the backup connection subsystem. Enter the name or use the pop-up pick list applet to choose one. An empty string is valid and means that no backup is present.	Anytime. Takes effect immediately.	
Execution Order	Mandatory	String	The request queue processing type. Enter the name or the use pop-up pick list applet to choose one. The valid values are: • `Original` • `Campaign` • `Priority`	Anytime. Takes effect immediately.	See the section, "The Synchronization from the Siebel Side to the Genesys Side" on page 39 for more details.

Table 1: The Columns of the Synchronization Server Applet (Continued)

Column	Type	Data Type	Description	Update Allowed	Comments
Folder	Optional	String	The Configuration Manager folder name where the objects that are synchronized through the Campaign Synchronization Server are placed. It affects the following Configuration Manager sections: • Campaign • Calling List • Table Access An empty string is valid and means that the objects are created directly in the aforementioned sections.	When the object is not in use. [a]	
Campaign Folder	Optional	String	The Configuration Manager folder name where the Campaign objects are placed. See "Campaign Folder, Calling List Folder, and Table Access Folder" on page 49.	When the object is not in use. [a]	Hidden by default

Table 1: The Columns of the Synchronization Server Applet (Continued)

Column	Type	Data Type	Description	Update Allowed	Comments
Calling List Folder	Optional	String	The Configuration Manager folder name where the Calling List objects are placed. See "Campaign Folder, Calling List Folder, and Table Access Folder" on page 49.	When the object is not in use. [a]	Hidden by default
Table Access Folder	Optional	String	The Configuration Manager folder name where the Table Access objects are placed. See "Campaign Folder, Calling List Folder, and Table Access Folder" on page 49.	When the object is not in use. [a]	Hidden by default

a. The `CampSynch Configuration` object is considered as not in use when:

–Both of the related workflow process instances are stopped.

–There are no campaigns linked to it.

–There are no related pending requests present in the request queue.

Notes:
- The connection subsystems cannot be used twice. Nevertheless, several connection subsystems can be directed to or refer to the same Campaign Synchronization Server.
- The `CampSynch Configuration` object can be deleted only when it is not used.

Campaign Folder, Calling List Folder, and Table Access Folder

The fields `Campaign Folder`, `Calling List Folder`, and `Table Access Folder` are designed to specify an absolute path to the corresponding objects in Configuration Manager (`Campaigns`, `Calling Lists`, and `Table Access` configuration objects).These fields are hidden by default. To make them visible, use the `Columns Displayed` applet menu item. See Figure 13 on page 50 for an example.

The `Folder` field is supported as previously, and is used to specify a relative path to the configuration object.

All these fields are used according to the following rule: if no absolute path is specified, the relative path is used. This rule applies to each absolute path field separately.

A relative path specifies an object path that is relative to the default object path (`/Campaigns`, `/Calling Lists`, or `/Table Access`). For example, the `/SBL` relative path assumes the object creation under `/Campaigns/SBL`, `/Calling Lists/SBL`, and `/Table Access/SBL`.

An absolute path specifies a full object path that starts from the tenant root (but does not include the tenant name). The absolute path enables using preconfigured `Configuration Units` and `Sites`. For example, an absolute path can be `Unit1/Campaigns/SBL` or `Site1/Unit2/Calling Lists/SBL/Org1`.

Notes:
- An absolute path must contain a folder of type that corresponds to the required object type (object type `Campaign` for campaigns, object type `Calling List` for calling lists, or object type `Table Access` for table access objects).
- `Configuration Units` and `Sites` must be created prior to synchronization, along with a folder of the required type. All subfolders can be created automatically during synchronization.

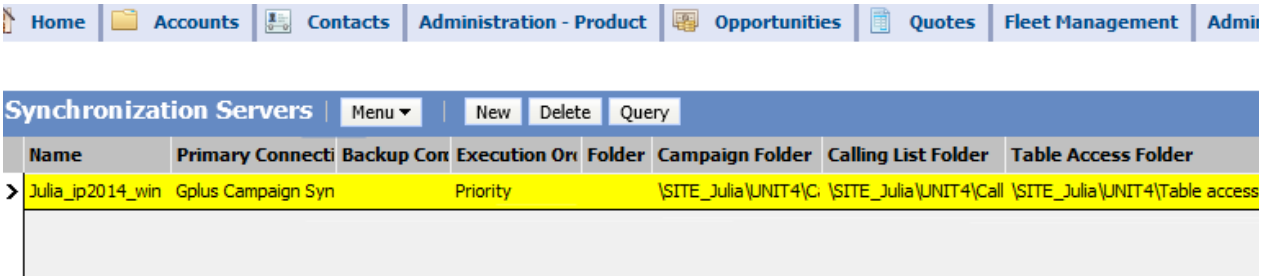

Figure 13: Additional Folders Example

The Campaign Workflow Applet

The `Campaign Workflow` applet is used to start and stop the campaign workflow process instance for the `CampSynch Configuration` object. See the section, "The Synchronization from the Siebel Side to the Genesys Side" on page 39 for more details about this workflow.

This applet is used for monitoring and modifying the workflow parameters that are represented by the applet's fields as described in Table 2:

Table 2: The Columns of the Campaign Workflow Applet

Column	Type	Data Type	Description	Update Allowed	Comments
No Data Timeout	Mandatory	A positive integer, >1. The default value is `60`.	The delay time value in seconds between the inspections of the request queue when no request is found in the previous step.	Anytime. Takes effect immediately.	
Retry Timeout	Mandatory	A positive integer, >1. The default value is `60`.	The delay time value in seconds between the attempts to execute a request when a recoverable error occurs.	Anytime. Takes effect immediately.	
Status	Read Only	String	Displays the instance state of the workflow process: running or stopped.	Not allowed	The status is displayed by the red or green icons.
Started At	Read Only	Datetime	Displays the timestamp of the last time that the workflow process instance was started.	Not allowed	
Stopped At	Read Only	Datetime	Displays the timestamp of the last time that the workflow process instance was stopped.	Not allowed.	

The `Start` and `Stop` buttons enables the starting and stopping of the corresponding workflow process instance.

The `Refresh` button enables the refreshing of the view. Since the workflow starting and stopping processes are asynchronous, refreshing the view is sometimes required to get the actual state of the workflow instance.

The Call Results Workflow Applet

The `Call Results Workflow` applet is used to start and stop the instance of the call results workflow process for the `CampSynch Configuration` object. See the

section, “The Synchronization from the Genesys Side to the Siebel Side” on page 40 for more details about this workflow.

This applet enables the monitoring and modifying of the workflow parameters that are represented by the applet's fields as described in Table 3:

Table 3: The Columns of the Call Results Workflow Applet

Column	Type	Data Type	Description	Update Allowed	Comments
Query Timeout	Mandatory	A positive integer, >1. The default value is `60`.	The delay time value between the requests.	Anytime. Takes effect immediately.	
Retry Timeout	Mandatory	A positive integer, >1. The default value is `60`.	The delay time value in seconds between the attempts to execute a request when a recoverable error occurs.	Anytime. Takes effect immediately.	
Status	Read Only	String	Displays the instance state of the workflow process: running or stopped.	Not allowed	The status is displayed by the red or green icons.
Started At	Read Only	Datetime	Displays the timestamp of the last time that the workflow process instance was started.	Not allowed	
Stopped At	Read Only	Datetime	Displays the timestamp of the last time that the workflow process instance was stopped.	Not allowed.	

The `Start` and `Stop` buttons enables the starting and stopping of the corresponding workflow process instance.

The `Refresh` button enables the refreshing of the view. Since the workflow starting and stopping processes are asynchronous, refreshing the view is sometimes required to get the actual state of the workflow instance.

The Campaigns View

The Campaigns view is designed to provide the tools to:

- Link the Siebel campaigns with the CampSynch Configuration objects and the configuration synchronization options.
- Enable and disable the synchronization of a specific Siebel campaign to the Genesys side.

The Campaigns view is shown in Figure 14:

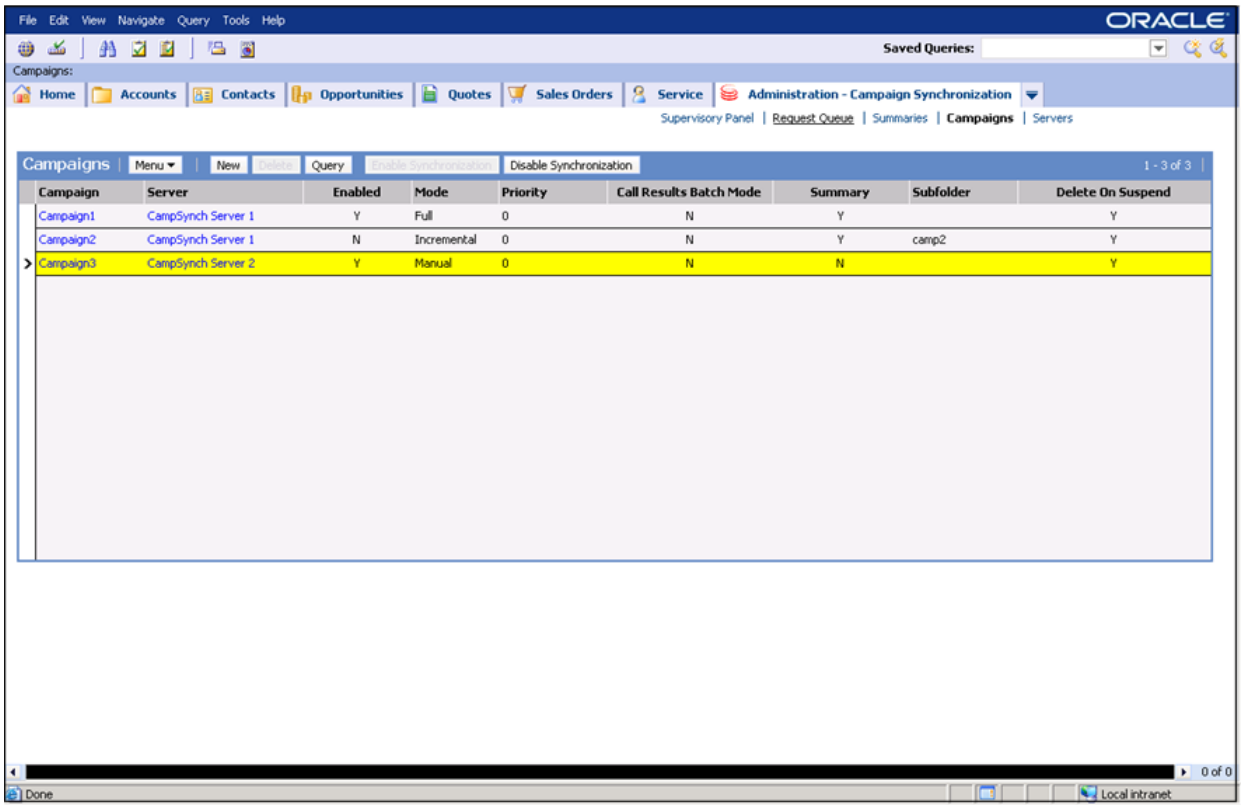

Figure 14: The Campaign View

The Campaigns Applet

The Campaigns applet is used to create, modify, and delete the link between the CampSynch Configuration objects and the Siebel campaigns. This link also contains the synchronization options that are applicable for a particular campaign.

Also, this applet is designed to mark a specific campaigns as enabled or disabled for the synchronization.

Each link and synchronization option has the following parameters that are represented by the applet's columns as described in Table 4:

Table 4: The Columns of the Campaigns Applet

Column	Type	Data Type	Description	Updating Allowed	Comments
Campaign	Mandatory	String	The name of the Siebel campaign. Enter the name or use the pop-up pick list applet to choose one.	When a campaign is marked as disabled for synchronization.	
Server	Mandatory	String	The name of the `CampSynch Configuration` object. Enter the name or use the pop-up pick list applet to choose one.	When a campaign is marked as disabled for synchronization.	
Enabled	Read Only	Boolean	Shows whether the campaign is marked as enabled for synchronization or not.	Not allowed	
Mode	Mandatory	String	The synchronization mode. The possible values are: • `Full` • `Incremental` • `Manual` Enter the mode or use the pop-up pick list applet to choose one.	When a campaign is marked as disabled for synchronization.	
Priority	Optional	Positive Integer, `>= 0`, The default value is `0` (zero)	The priority of the campaign synchronization. The lesser value corresponds to a higher priority.	Any time. Takes effect for the newly generated requests.	

Table 4: The Columns of the Campaigns Applet (Continued)

Column	Type	Data Type	Description	Updating Allowed	Comments
Call Results Batch Mode	Optional	Boolean, The default value is `False`.	Determines whether the batch mode is on or off for the call results delta requests.	Any time. Takes effect for the newly generated requests.	See the section, "The Synchronization from the Genesys Side to the Siebel Side" on page 40 for more details.
Summary	Optional	Boolean, The default value is `False`.	Determines, whether or not the synchronization summary should be generated and stored for the campaign data synchronization requests.	Any time. Takes effect for the newly generated requests.	
Subfolder	Optional	String	The subfolder name where the objects for this campaign are placed in Configuration Manager. It affects the following Configuration Manager sections: • Campaign • Calling List • Table Access If this data is provided, the final folder name is calculated as `<Folder>/<Subfolder>`, where `<Folder>` is the value of the corresponding option of the `CampSynch Configuration` object.	When a campaign is marked as disabled for synchronization.	
Delete On Suspend	Optional	Boolean. The default value is `True`.	Determines whether or not if the calling list should be deleted from Genesys when the corresponding wave is suspended in Siebel.	Any time. Takes effect for the newly generated requests.	

Table 4: The Columns of the Campaigns Applet (Continued)

Column	Type	Data Type	Description	Updating Allowed	Comments
Delete On Purge	Optional	Boolean. The default value is `True`.	Determines whether or not if the campaign should be deleted from Genesys when the corresponding campaign load is purged in Siebel.	Any time. Takes effect for the newly generated requests.	Hidden column. Use the `Columns Displayed` applet's menu item to display this column.
Delete On Disable	Optional	Boolean. The default value is `True`.	Determines whether or not if the campaign should be deleted from Genesys when the corresponding campaign is disabled for synchronization in Siebel.	Any time. Takes effect for the newly generated requests.	Hidden column. Use the `Columns Displayed` applet's menu item to display this column.
Template	Optional	String	The Genesys campaign name that should be taken as the template during a new campaign creation. Used to avoid the manual configuration steps after synchronization. **Note:** This mode is not implemented.		Hidden column. The functionality is not implemented. The value is ignored.

Note: Each Siebel campaign can be linked only with a single `CampSynch Configuration` object.

The `Enable Synchronization` and `Disable Synchronization` buttons are used to enable and disable the selected campaign synchronization. No synchronization activities are performed until the campaign is enabled for synchronization.

Notes:
- When a campaign is disabled for synchronization, it can be deleted or deactivated on the Genesys side depending on the `Delete On Disable` option. In any case, it is stopped for processing by the Genesys Outbound Contact Solution.
- A link record can be deleted only when the campaign is disabled for synchronization.

The Supervisory Panel View

The `Supervisory Panel` view is designed to provide the tools for the following:

- The monitoring of the campaign synchronization status.
- Performing the manual synchronization operations.

Note: Only the Siebel-side synchronization status is monitored. Only the information about the current synchronization process (if the synchronization is in progress or there is no data to synchronize) is available. It does not show the overall campaign synchronization status—for example, `campaign is fully synchronized` or `3 of 5 waves are synchronized`.

This view contains the following three detail views: `Status`, `Request Queue`, and `Summaries` that can be selected using the tabs.

All of these views contain a common `Campaigns` applet. This applet shows the list of Siebel campaigns that are enabled for synchronization at that time. It is a read-only applet that display the following information about each campaign: the campaign name, the priority, and the synchronization mode. Also, it has a hidden column to show the Campaign ID.

These views also contain their own detail applets, each with its own purpose. These detail applets show the information related to the campaign that is selected in the common `Campaigns` applet.

The common `Campaigns` applet has a `Refresh` button that enables for the refreshing of the current view. It is used to get the updated monitoring information.

The Supervisory Panel / Status Detail View

The `Supervisory Panel / Status` detail view is designed to monitor the campaign, the Siebel-side synchronization status, and to perform the manual synchronization operations.

The `Supervisory Panel / Status` view is shown in figure Figure 15:

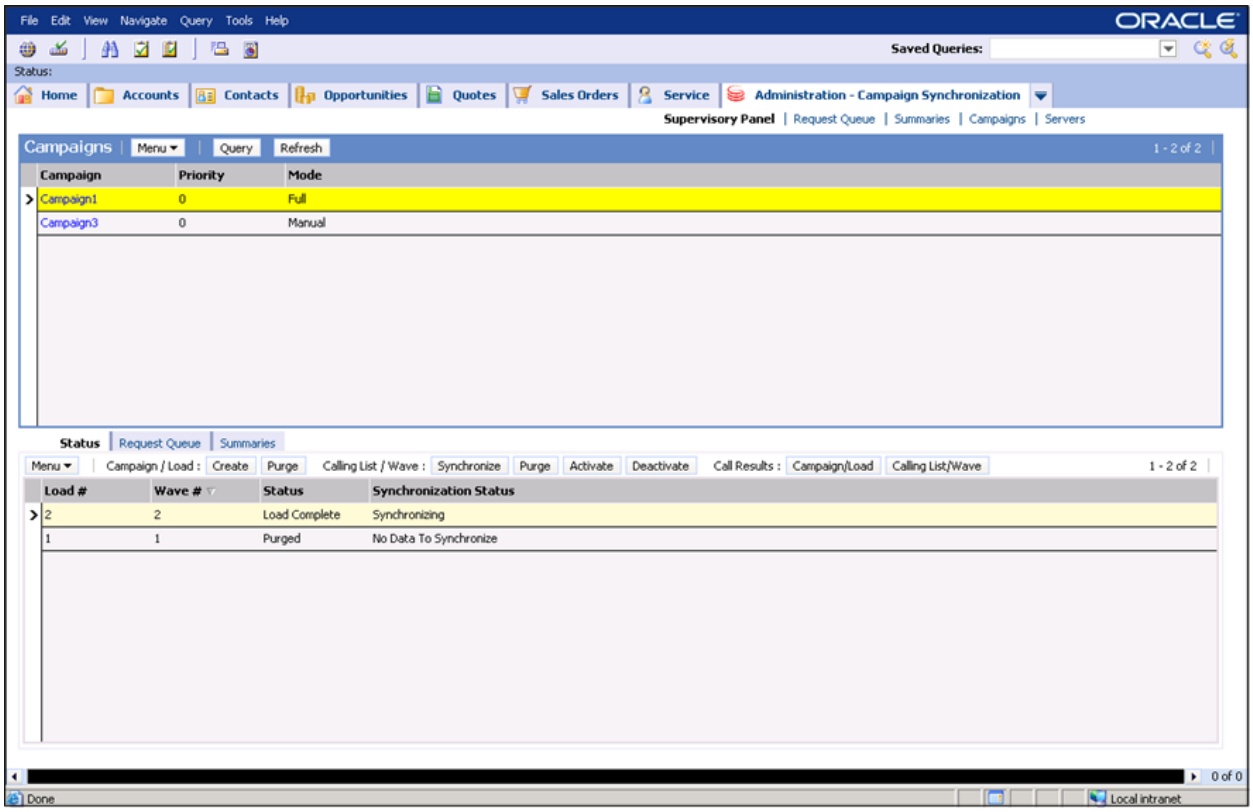

Figure 15: The Supervisory Panel / Status View

The Status Read-Only Detail Applet

The `Status` read-only detail applet shown in this view provides the following information via its columns as described in Table 5:

Table 5: The Columns for the Status Detail Applet

Column	Description
Load #	The Siebel campaign load number.
Wave #	The Siebel campaign wave number.

Table 5: The Columns for the Status Detail Applet (Continued)

Column	Description
Status	The native Siebel wave status (Load Complete, Launched, and so on)
Synchronization Status	The synchronization status of the referenced wave. There are four possible values listed as follows: `No Data To Synchronize`: there are no requests in the synchronization queue. `Synchronizing`: there are requests present in the queue and the corresponding workflow is currently processing them. `Synchronizing (Is On Hold)`: there are requests present in the queue, but the corresponding workflow is currently stopped. `Failed`: there are failed requests present in the queue.

Also, this applet contains a set of buttons that enable the manually performing the synchronization operations. These buttons are divided into the following three groups:

- The Campaign / Load group buttons
- The Calling List / Wave group buttons
- The Call Results group buttons

The buttons are described in the tables that follow below:

The Campaign / Load group buttons

Table 6: The Buttons for the Campaign / Load Group

Button	Purpose
Create	Generates and places a request into the queue to create a campaign on the Genesys side that corresponds to a selected Siebel campaign load. No requests to synchronize the calling lists are generated.
Purge	Generates and places a request into the queue to delete a campaign from the Genesys side that corresponds to a selected Siebel campaign load. All calling lists are deleted as well.

The Calling List / Wave group buttons

Table 7: The Buttons for the Calling List / Wave Group

Button	Purpose
Synchronize	Generates and places a request into the queue to export a calling list to the Genesys side that corresponds to a selected Siebel campaign load wave. If the selected wave is launched, then it is created in the activated state on the Genesys side; otherwise, it is created in the deactivated state.
Purge	Generates and places a request into the queue to delete a calling list from the Genesys side that corresponds to a selected Siebel campaign load wave.
Activate	Generates and places a request into the queue to activate the calling list on the Genesys side that corresponds to a selected Siebel campaign load wave.
Deactivate	Generates and places a request into the queue to deactivate a calling list on the Genesys side that corresponds to a selected Siebel campaign load wave.

The Call Results group buttons

Table 8: The Buttons for the Call Results Group

Button	Purpose
Campaign / Load	Generates and executes a request to obtain the call results for an entire Genesys campaign that corresponds to a selected Siebel campaign load.
Calling List/Wave	Generates and executes a request to obtain the call results for an entire Genesys calling list that corresponds to a selected Siebel campaign wave.

Note: You can perform manual synchronization operations for campaigns that are synchronizing in automatic modes (`Full` and `Incremental`). Be careful when doing these operations, especially deletions, in order not to break the overall synchronization process for each particular campaign.

The Supervisory Panel / Request Queue Detail View

The `Supervisory Panel /Request Queue` detail view is designed to monitor the state of the request queue in the parts of the requests that belong to a specific campaign.

The `Supervisory Panel /Request Queue` view is displayed in Figure 16:

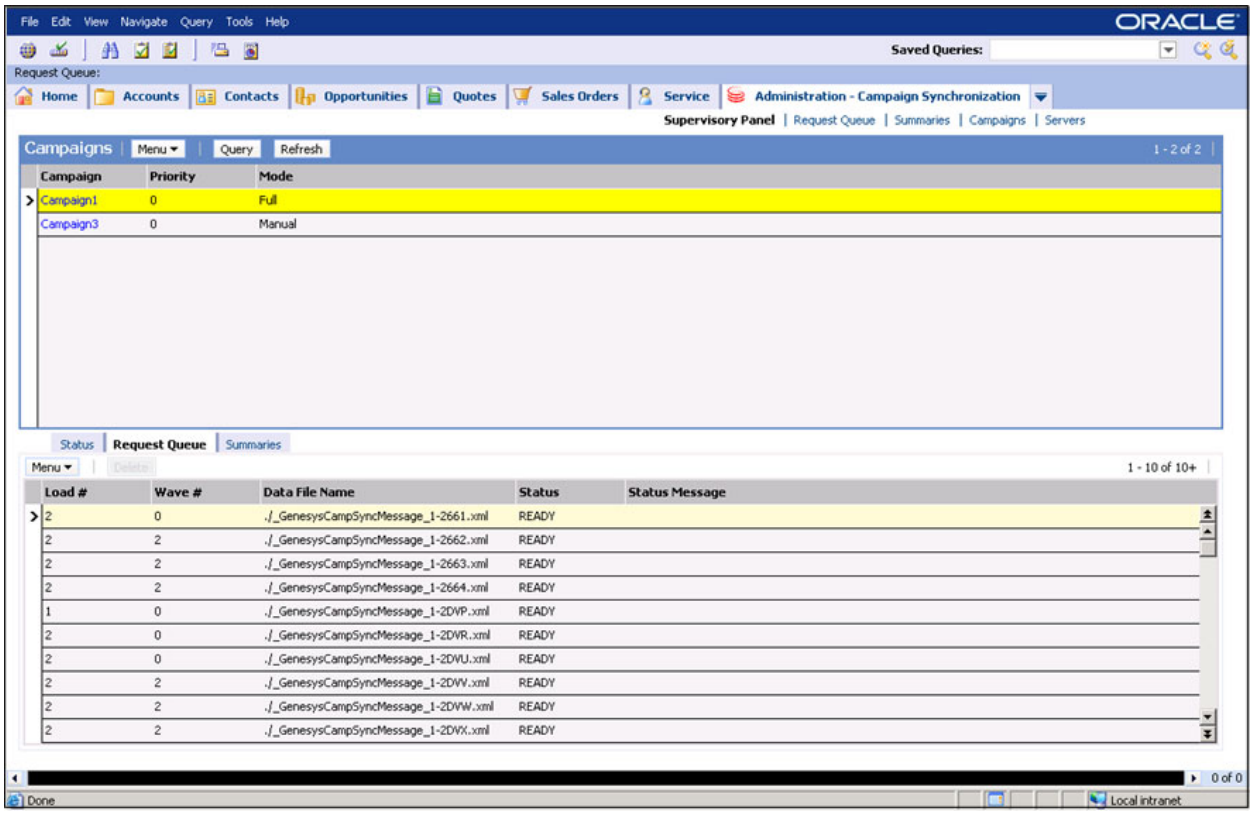

Figure 16: The Supervisory Panel / Request Queue View

The `Request Queue` read-only detail applet shown in this view provides the following information via its columns as described in Table 9:

Table 9: The Columns of the Request Queue Detail Applet

Column	Description	Comments
Load #	The Siebel campaign load number.	
Wave #	The Siebel campaign wave number.	
Data File Name	The path to the request data file. Can be used to obtain the request details.	
Status	The request execution status. The possible values are: • `INIT`: the request is in the initialization state. • `READY`: the request is ready for execution. • `FAILED`: the request execution failed with an unrecoverable error.	

Table 9: The Columns of the Request Queue Detail Applet (Continued)

Column	Description	Comments
Status Message	The message that describes a status. It can be either an unrecoverable or a recoverable error description or an empty string.	
Id	The Record ID.	Hidden column.
Chain Id	The Request Chain ID (several requests can be chained).	Hidden column.
Priority	The request priority.	Hidden column.
Server ID	The `CampSych Configuration` object ID.	Hidden column.

The `Delete` button enables the deletion of a request. It is enabled for the failed requests only.

The Supervisory Panel / Summaries Detail View

The `Supervisory Panel / Summaries` detail view is designed to monitor the synchronization summary for the already executed requests that belong to a specific campaign, if the corresponding option to which it belongs is turned on.

The summary of a specific request execution is represented as length-variable, arbitrary, multi-line text that is generated by the Campaign Synchronization Server during the request execution. It usually contains information about the created, updated, or deleted objects on the Genesys side.

The `Supervisory Panel / Summaries` detail view is displayed in Figure 17:

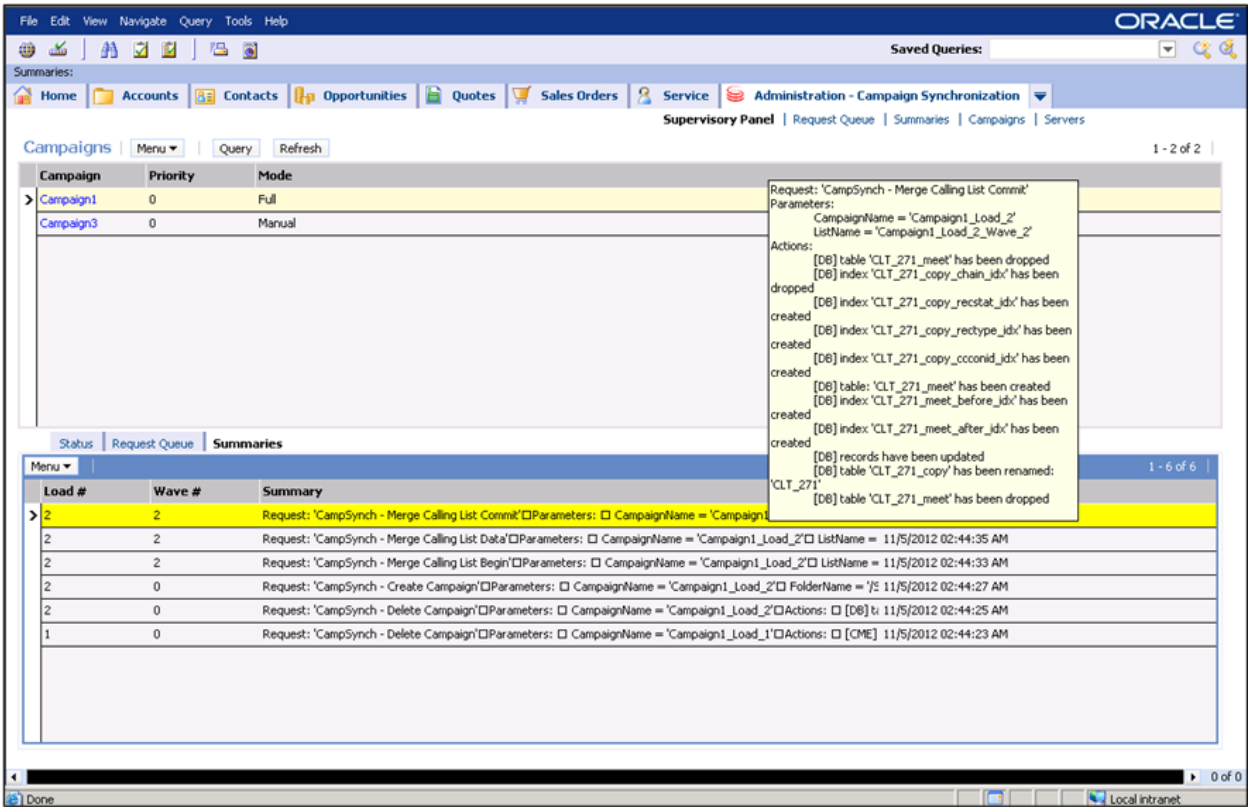

Figure 17: The Supervisory Panel / Summaries Detail View

The `Summaries` read-only detail applet shown on this view provides the following information in its columns as described in Table 10:

Table 10: The Columns for the Summaries Detail Applet

Column	Description
Load #	The Siebel campaign load number.
Wave #	The Siebel campaign wave number.
Summary	The request execution summary.
Created	The timestamp of the request execution.

By default, the new records (the recently executed requests summary) appear at the top of this applet.

To prevent excessive database use, it is recommended to regularly delete the outdated records.

The Request Queue View

The `Request Queue` view is designed to monitor the state of the entire request queue.

The `Request Queue` view is displayed in Figure 18:

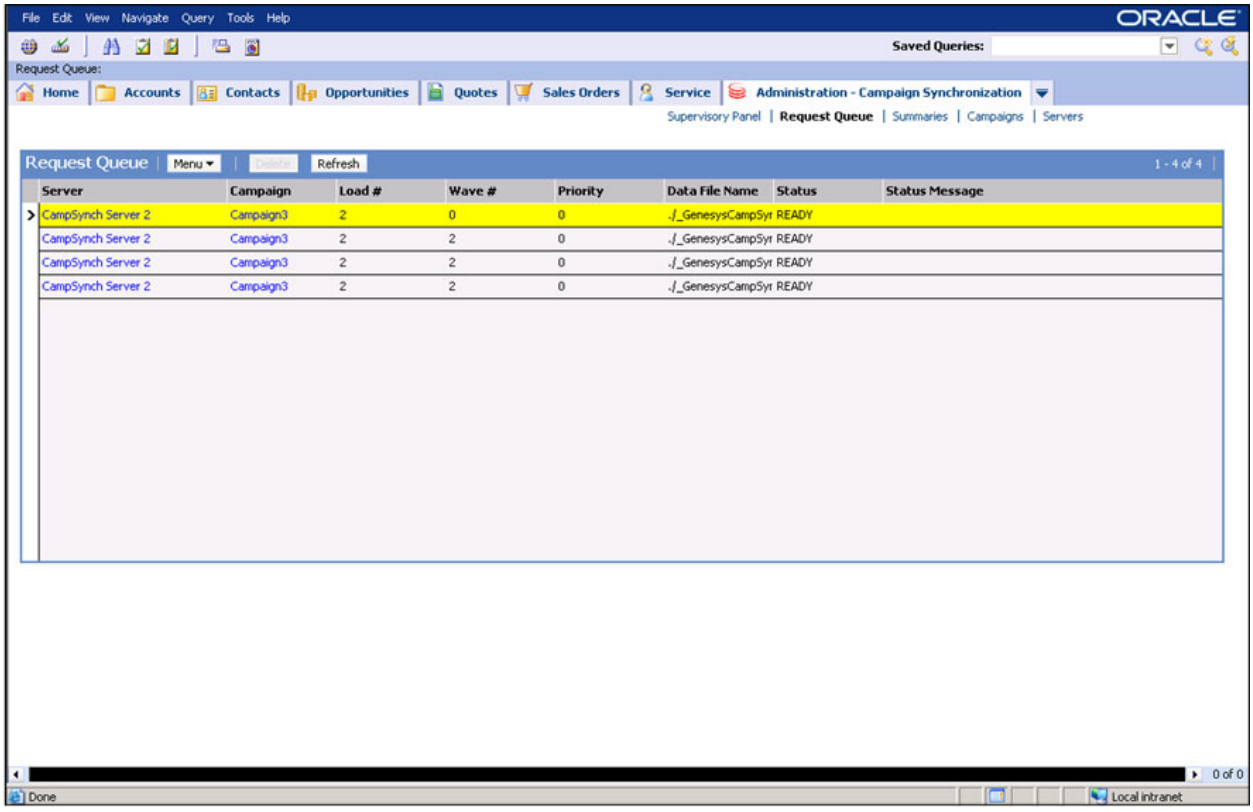

Figure 18: The Request Queue View

The `Request Queue` read-only applet shown in this view provides the following information via its columns as described in Table 11:

Table 11: The Columns of the Request Queue Applet

Column	Description	Comments
Server	The `CampSynch Configuration` object name.	
Campaign	The Siebel campaign name.	
Load #	The Siebel campaign load number.	
Wave #	The Siebel campaign wave number.	
Priority	The request priority.	

Table 11: The Columns of the Request Queue Applet (Continued)

Column	Description	Comments
Data File Name	The path to the request data file. Can be used to obtain the request details.	
Status	The request execution status. The possible values are: • `INIT`: the request is in the initialization state. • `READY`: the request is ready for execution. • `FAILED`: the request execution failed with an unrecoverable error.	
Status Message	The message that describes a status. It can be either an unrecoverable or a recoverable error description or an empty string.	
Id	The Record ID.	Hidden column.
Chain Id	The Request Chain ID (several requests can be chained).	Hidden column.
Campaign Id	The Siebel Campaign ID	Hidden column.
Server ID	The `CampSych Configuration` object ID.	Hidden column.

The `Delete` button enables the deletion of a request. It is enabled for the failed requests only.

The `Refresh` button enables the refreshing of the current view.

The Summaries View

The `Summaries` view is designed to monitor the synchronization summary for the processed requests of those campaigns to which the corresponding option is turned on.

The summary of a specific request execution is represented as length-variable, arbitrary, multi-line text that is generated by the Campaign Synchronization Server during the request execution. It usually contains the information about the created, updated, or deleted objects on the Genesys side.

The `Summaries` view is displayed in Figure 19 on page 66:

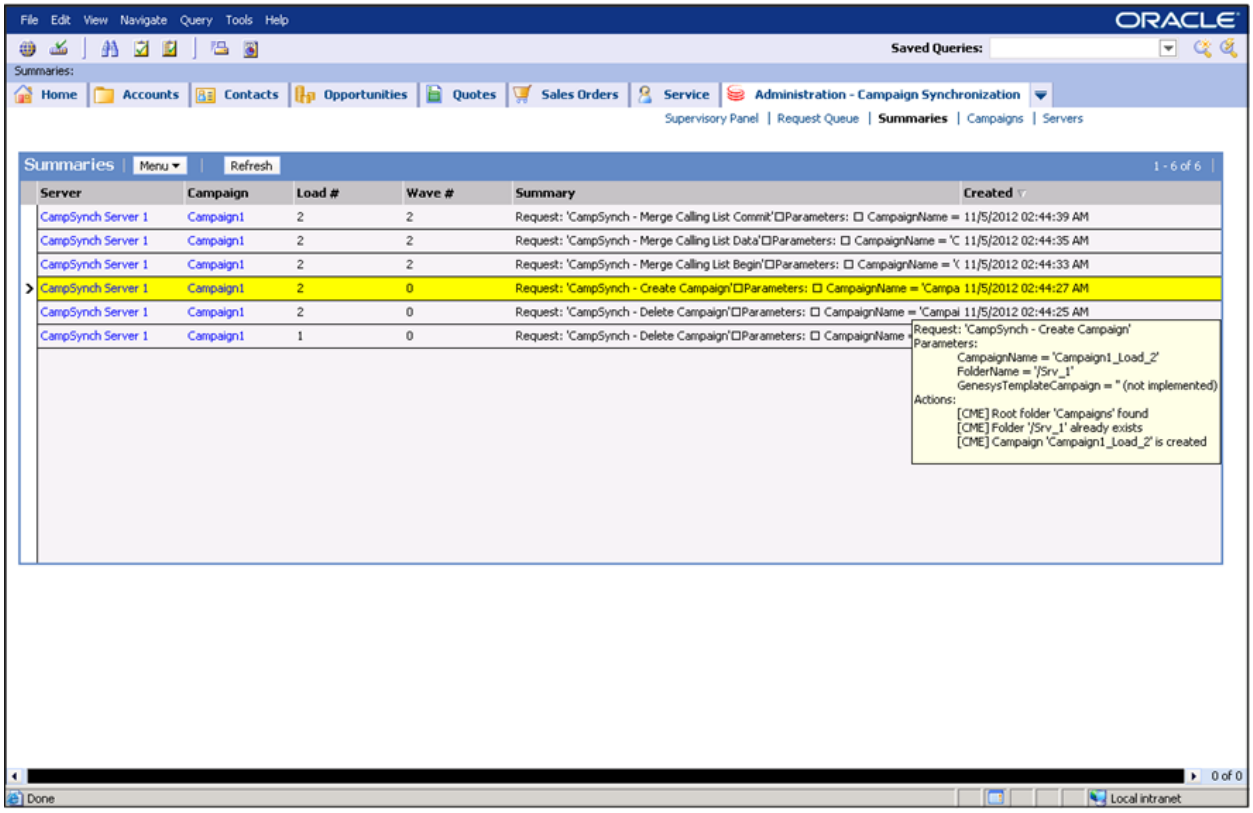

Figure 19: The Summaries View

The `Summaries` read-only applet displayed in this view provides the following information via its columns as described in Table 12:

Table 12: The Columns of the Summaries Applet

Column	Description	Comments
Server	The `CampSynch Configuration` object name.	
Campaign	The Siebel campaign name.	
Load #	The Siebel campaign load number.	
Wave #	The Siebel campaign wave number.	
Summary	The request execution summary.	
Created	The timestamp of the request execution.	
Campaign Id	The Siebel Campaign ID	Hidden column.
Server ID	The `CampSych Configuration` object ID.	Hidden column.

By default, the new records (the recently executed requests summary) appear at the top of this applet.

To prevent excessive database use, it is recommended to regularly delete the outdated records.

The Procedures for the Basic Scenarios

This section describes how to configure the components of the campaign synchronization process and is divided into the following sub-sections:

Creating a Siebel Server Named Connection Subsystem

The Siebel “EAI HTTP Transport” mechanism is used to communicate with the Campaign Synchronization Server(s). This mechanism uses the Siebel Server Named connection subsystems as a protocol and a destinations descriptor for the connections.

You must configure separate connection subsystems for each primary and, optionally, each backup Campaign Synchronization Server that is used.

Procedure: Creating a connection subsystem

Purpose: To create and configure the connection subsystems that are used by the Campaign Synchronization Component.

Start of procedure

1. Log into a Siebel Server via the Web Client as an administrator, or as an Outbound Campaign administrator user, if this user has sufficient privileges.
2. Navigate through the Site Map to get to your Siebel Server Profile Configuration: select `Site Map > Administration - Server Configuration > Profile Configuration`.

Creating a Connection Subsystem

3. In the `Profile Configuration` applet, create a new record.
4. Specify the following parameters for the new record:
   - In the `Profile` field, enter an appropriate value according to your needs and Siebel limitations.
   - In the `Alias` field, enter an appropriate value according to your needs and Siebel limitations.
   - In the `Description` field, enter an appropriate value according to your needs and Siebel limitations.
   - In the `Subsystem Type` field, enter (or select using the pop-up pick applet) the `HTTPSubSys` value.
5. Save the new record.
6. For the `Profile Configuration` record you just created, enter the following parameters in the `Profile Parameter` applet:
   - `HTTPRequestMethod = POST`
   - `HTTPRequestURLTemplate = http://<host>:<port>`

   where:

   `<host>` is the host where you installed the Campaign Synchronization Server.

   `<port>` is the port you specified in the `Communication Port` field in the Configuration Manager's `Server Info Tab` of the corresponding Campaign Synchronization Component `Application` object (see Figure 20 on page 69).
7. Check a value of the `HTTPSleepTime Profile Parameter` that has the default value of `120000` (2 minutes). Increase this value, if required.
8. Repeat Step 2 to 6 for each primary and backup Connection Subsystem that you need.

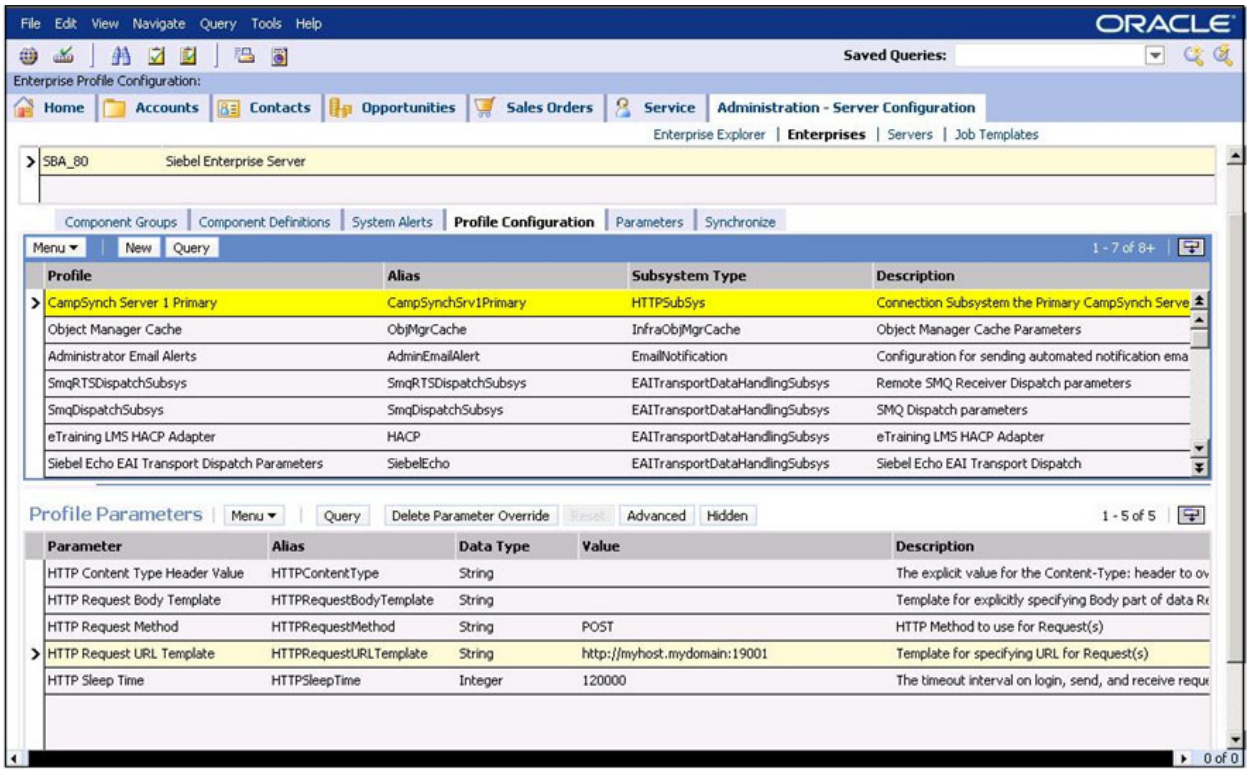

Figure 20: Configuring a Connection Subsystem

End of procedure

Next Steps

- Create a `CampSynch Configuration` object, if you have not already done so. See, Procedure: Creating a CampSynch Configuration object, on page 70.

Configuring a Siebel Campaign for Synchronization

The configuration procedure of preparing Siebel campaign for synchronization includes the following steps:

1. Configuring the Siebel Server Named connection subsystems.

   If you have not configured a connection subsystem that directs to the primary and the optional back Campaign Synchronization Servers, see Procedure: Creating a connection subsystem, on page 68.

2. Creating a `CampSynch Configuration` object.

   If you have not configured a `CampSynch Configuration` object that directs to the required Campaign Synchronization Server, see Procedure: Creating a CampSynch Configuration object, on page 70.

3. Linking a campaign with a `CampSynch Configuration` object.

   Perform this step to define the campaign synchronization target and the campaign-level synchronization options. See, Procedure: Linking a campaign to a CampSynch Configuration object, on page 71.

Procedure: Creating a CampSynch Configuration object

Purpose: To create and configure a `CampSynch Configuration` object.

Start of procedure

1. Log into a Siebel Server via the Web Client as an Outbound Campaign administrator.
2. Navigate through the Site Map to get to your `Servers` view of the Campaign Synchronization Management Console: select `Site Map > Administration - Campaign Synchronization > Servers`.
3. In the `Synchronization Servers` applet, insert a new record.
4. Fill in the record's fields according to your needs as described in the section, “The Synchronization Servers Applet” on page 46.
5. Save the record.

Note: After a `CampSynch Configuration` object is created, both of the corresponding workflow process instances are not running. Start each of them when (and if) you need to according to the following sections: “Starting and Stopping the Siebel Side to the Genesys Side Synchronization Process” on page 72 and “Starting and Stopping the Genesys Side to the Siebel Side Synchronization Process” on page 73 described below.

End of procedure

Next Steps

- Linking a Siebel campaign to a `CampSynch` configuration object. See, Procedure: Linking a campaign to a CampSynch Configuration object, on page 71.

Procedure:
Linking a campaign to a CampSynch Configuration object

Purpose: To link a campaign to a `CampSynch Configuration` object.

Start of procedure

1. Log into a Siebel Server via the Web Client as an Outbound Campaign administrator.
2. Navigate through the Site Map to get to your `Campaigns` view of the Campaign Synchronization Management Console: select `Site Map > Administration - Campaign Synchronization > Campaigns`.
3. In the `Campaigns` applet, insert a new record.
4. Fill in the record's fields according to your needs as described in the section, “The Campaigns Applet” on page 53.
5. Save the record.

> **Note:** The synchronization of a specific campaign is not started simply by linking it with a `CampSynch Configuration` object. The linking procedure only defines the synchronization parameters. To enable the campaign for synchronization, see “Enabling and Disabling a Siebel Campaign for Synchronization” on page 71 described below.

End of procedure

Next Steps

- Enable or disable a Siebel campaign for synchronization. See, “Enabling and Disabling a Siebel Campaign for Synchronization”.

Enabling and Disabling a Siebel Campaign for Synchronization

The special procedure to enable a specific campaign synchronization process is provided by this current solution. This procedure should be done after all of the required synchronization parameters are set.

> **Note:** Enabling a campaign for synchronization allows the synchronization requests to be generated and placed into a request queue. This process does not control when the synchronization requests are sent to the Genesys side.

When you do not need a campaign to be synchronized anymore, you should disable the campaign for synchronization. This procedure causes either the deletion or the deactivation of a the campaign from or on the Genesys side.

Procedure: Enabling/Disabling a Siebel campaign for the synchronization to the Genesys side

Purpose: To enable or disable a Siebel campaign synchronization.

Start of procedure

1. Log into a Siebel Server via the Web Client as an Outbound Campaign administrator.
2. Navigate through the Site Map to get to your `Campaigns` view of the Campaign Synchronization Management Console: select `Site Map > Administration - Campaign Synchronization > Campaigns`.
3. In the `Campaigns` applet, select an appropriate campaign.
4. Click the `Enable Synchronization` button to enable the campaign synchronization and click the `Disable Synchronization` button to disable it. The `Enabled` field will switch to either `Y` or `N` accordingly.

End of procedure

Next Steps

- Start or stop the Siebel side to the Genesys side synchronization process. See the section, “Starting and Stopping the Siebel Side to the Genesys Side Synchronization Process” on page 72.

Starting and Stopping the Siebel Side to the Genesys Side Synchronization Process

Transferring requests from the Siebel side to the Genesys side is controlled by the special campaign workflow. You should start this workflow process instance for a particular `CampSynch Configuration` objects when you want to initiate real data synchronization. You should stop it when you want to suspend the data synchronization—for example, you may want to perform the data synchronization at night and suspend it during the working hours.

Procedure:
Starting and stopping the data synchronization from the Siebel side to the Genesys side

Purpose: To start and/or stop the data synchronization from the Siebel side to the Genesys side.

Start of procedure

1. Log into a Siebel Server via the Web Client as an Outbound Campaign administrator.
2. Navigate through the Site Map to get to your `Servers` view of the Campaign Synchronization Management Console: select `Site Map > Administration - Campaign Synchronization > Servers`.
3. In the `Synchronization Servers` applet, select an appropriate `CampSynch Configuration` object.
4. In the `Campaign Workflow` applet, click the `Start` button to run the workflow process instance and click the `Stop` button to stop it.
5. Click the `Refresh` button to refresh the view, if required.

End of procedure

Next Steps

- Start and/or stop the Genesys side to the Siebel side synchronization process. See the section, "Starting and Stopping the Genesys Side to the Siebel Side Synchronization Process".

Starting and Stopping the Genesys Side to the Siebel Side Synchronization Process

The data requesting (the call results updates) from the Genesys side to the Siebel side is controlled by the special call results workflow. You should start this workflow process instance for specific `CampSynch Configuration` objects when you want to start requesting updates for the call results. You should stop it when you want to suspend requesting the updates—for example, you may want to suspend requesting the updates at night when no calls are made.

Procedure:
Starting and stopping the data synchronization from the Genesys side to the Siebel side

Purpose: To start and/or stop the data synchronization from the Genesys side to the Siebel side.

Start of procedure

1. Log into a Siebel Server via the Web Client as an Outbound Campaign administrator.
2. Navigate through the Site Map to get to your `Servers` view of the Campaign Synchronization Management Console: select `Site Map > Administration - Campaign Synchronization > Servers`.
3. In the `Synchronization Servers` applet, select an appropriate `CampSynch Configuration` object.
4. In the `Call Results Workflow` applet, click the `Start` button to run the workflow process instance and click the `Stop` button to stop it.
5. Click the `Refresh` button to refresh the view, if required.

End of procedure

Next Steps

- Request the call results synchronization for the entire campaign load or wave. See the section, "Synchronizing the Call Results for the Entire Campaign Load or Wave".

Synchronizing the Call Results for the Entire Campaign Load or Wave

Requesting the call results and the number of call attempts for the entire Siebel campaign load (the entire Genesys campaign) or the entire Siebel wave (the Genesys calling list) can be done with the following procedure:

Procedure:
Manually synchronizing the call results

Purpose: To manually synchronize the call results for a particular campaign load or wave.

Start of procedure

1. Log into a Siebel Server via Web Client as a Outbound Campaign administrator.
2. Navigate through the Site Map to get to your `Supervisory Panel/Status` view of the Campaign Synchronization Management Console: select `Site Map > Administration - Campaign Synchronization > Supervisory Panel > Status`.
3. In the `Campaigns` applet, select an appropriate Siebel campaign.
4. In the `Status` detail applet, select an appropriate record and click the `Campaign/Load` button of the `Call Results` group to request the call results for the entire campaign load.
5. In the `Status` detail applet, select an appropriate record and click the `Calling List/Wave` button of the `Call Results` group to request the call results for the entire campaign load wave.

> **Note:** This procedure directly sends the requests to a configured Campaign Synchronization Server and updates the Siebel campaign contacts with the received data. Therefore, if a campaign or even a wave is large, the results may take awhile.

End of procedure

Next Steps

- Manually synchronize the campaign. See the section, "Manually Synchronizing the Campaign".

Manually Synchronizing the Campaign

The manual initiation of any synchronization activity under a specific campaign load and/or wave is possible when the campaign is enabled for synchronization. These operations are allowed for any campaign synchronization mode.

Procedure: Manually synchronizing a campaign and/or waves

Purpose: To manually synchronize a campaign and/or waves

Start of procedure

1. Log into a Siebel Server via Web Client as an Outbound Campaign administrator.
2. Navigate through the Site Map to get to your `Supervisory Panel/Status` view of the Campaign Synchronization Management Console: select `Site Map > Administration - Campaign Synchronization > Supervisory Panel > Status`.
3. In the `Campaigns` applet, select an appropriate Siebel campaign.
4. In the `Status` detail applet, select an appropriate record and click the `Create` or `Purge` buttons of the `Campaign / Load` group to perform the operations under selected the campaign load.
5. In the `Status` detail applet, select an appropriate record and click the `Synchronize`, `Purge`, `Activate`, or `Deactivate` buttons of the `Calling List / Wave` group to perform the operations under the selected campaign load wave.

   See the section, “The Supervisory Panel View” on page 57 for more details about the available synchronization operations.

> **Note:** During this procedure, no direct requests to the Campaign Synchronization Server(s) are produced. All of the generated requests are placed into the request queue for further processing by the workflow process instances. Therefore, all of these operations are performed quickly. If you need to ensure that the required requests are produced, then monitor the request queue.

End of procedure

Next Steps

- There are no further steps.

Chapter

4 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:

The section titled "The Communications (CTI) Toolbar and Controls" on page 18 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 callback, and Expert Contact.
- Media Routing Component and iWD Routing Component—Siebel eMail processing
- G*plus* Multimedia Component—Chat, Siebel E-mail, and Genesys E-mail.

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.

Procedure:
Logging into the Siebel Server

Purpose: To log into the Siebel Server.

Start of procedure

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

Notes:
- If an agent is in the Siebel configuration that is associated with the Adapter, then the agent will also log into the ACD Queue specified by the configuration (ACD group).
- Genesys recommends that you do not sign into two different computers at the same time using the same sign in password.

End of procedure

Next Steps

- There are no further steps.

Figure 21 on page 79 displays the screen that you see when you log into the Voice Component.

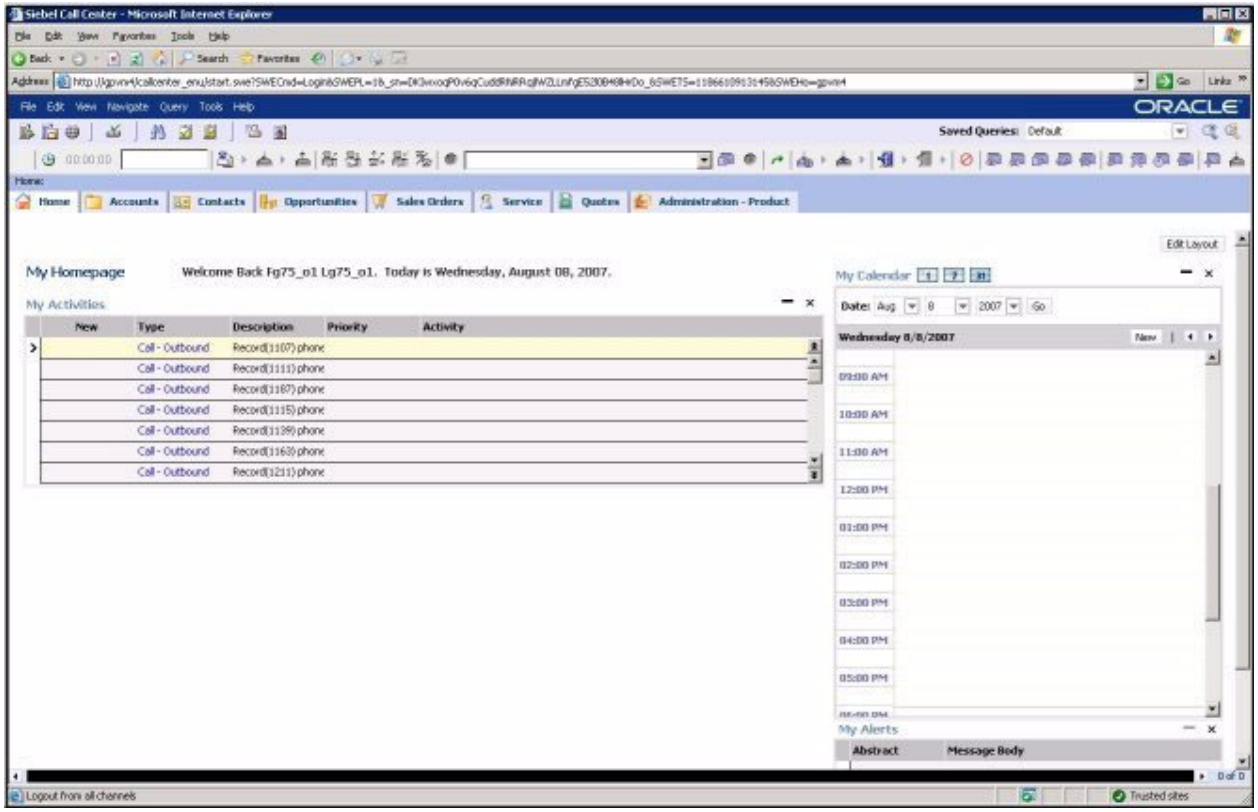

Figure 21: Agent's View of the Siebel Call Center

Notification of Interactions

An interaction occurs when a real person communicates with another real person, or with some message representing a person. The following examples are different types of interactions:

- a phone conversation between two people,
- a session between a person and an Interactive Voice Response (IVR) system that asks the person for information,
- receiving an e-mail from another person.

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

Notification of all incoming interactions can happen in two ways:

- `EventRinging` event: displays the ringing call information.
- `OpenMediaInvited` event: sends an invitation to handle a specific interaction—for example, Genesys E-Mail, Chat, Siebel eMail, and other open media items.

Notifications can be received in both Predictive and Progressive dialing mode campaigns.

An agent must be in the Ready state before they can receive notifications.

Making Yourself Ready or Not Ready

After you log in, you must put yourself in the Ready state 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

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 24.) Click this button to put yourself in the Ready state for all types of media defined by the Agent profiles for the particular Siebel configuration.

Figure 22: Ready Button

For a more specific approach, use the Media Type buttons. From left to right the buttons in the Figure 23 represent Voice, Push Preview interaction, Genesys E-mail, Chat, and Siebel eMail.

Figure 23: 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 13 lists the different `Media Type` buttons, and emphasizes the relationship between the group buttons and their sub-buttons.

Table 13: 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 Push Preview	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

Procedure: Making yourself ready to use media

Purpose: To put yourself in the `Ready` state to use some, or all types of media before you can start accepting interactions.

Start of procedure

1. Select the `Ready` button to make yourself ready. See Figure 24.
   The `Interaction` dialog box displays.

Figure 24: Ready Button

2. Select what you want to be ready for, as follows:
   - Click the `Ready` button (see Figure 24). 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 25, the Set ready for Email is selected.

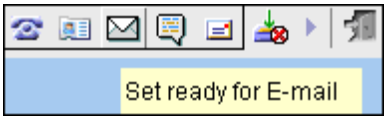

Figure 25: Set Ready Interaction Types

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)
- Push Preview
- Genesys E-mail
- Genesys Chat
- Co-browse

End of procedure

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 NotReady

Procedure: Making yourself NotReady

Purpose: To put yourself in the NotReady state.

Start of procedure

1. For all media channels, click the Not Ready button, (see Figure 26 on page 83).
   A dialog box opens (see Figure 27 on page 83) in which you can enter a reason for your NotReady 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 a particular media type.

Figure 26: Not Ready Button

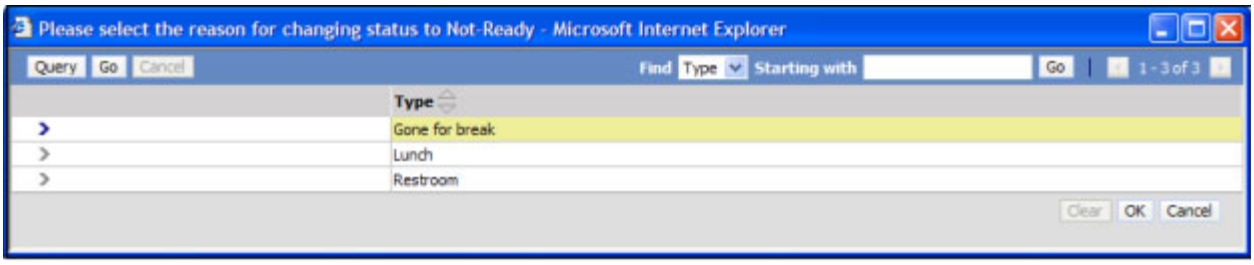

Figure 27: Reason Code for Changing Status to Not Ready

End of procedure

Next Steps

- There are no further steps.

Note: For information about the `NotReady` reason codes, see the 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 Feature
- The Outbound Campaign Feature
- The Universal Callback Feature
- The Expert Contact Feature

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

Not all desktops have every feature. 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 21 on page 79. This image shows the Siebel Call Center with the Adapter after you log in, but before a call is received.

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 under the Basic Voice controls:

- Making a call
- Answering an incoming phone calll
- Putting a call on hold
- Retrieving a call from hold
- Making a one-step transfer
- Making a two-step transfer
- Making Conference Calls and Forwarding Calls
- Hanging up a call
- Setting a call forward request
- Cancelling a call forward request

All of these procedures assume that you are in the `Ready` state. See “Making Yourself Ready or Not Ready” on page 80 for details.

The Basic Voice Controls

The basic voice controls are the standard Siebel Call Center application buttons and are supplied as a part of a standard installation. See the *Siebel Call Center Administration Guide* and the *Siebel Call Center User Guide* for more detailed information. The CTI toolbar provides the following `Basic Voice` buttons and their functions, which are described below:

`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.

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

`Set Forward:` Sets a call forwarding request.

`Cancel Forward:` Cancels a call forwarding request.

Procedure:
Using the CTI Toolbar's Basic Voice button functions

Purpose: To use the CTI Toolbar's `Basic Voice` button functions.

Start of procedure

Making a call

1. Enter the directory number (DN).
2. Click the `Make Call` button.

Answering an incoming phone call

3. 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.
4. 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.
5. To end the call, save any customer information and click the `Hang up` button.

   You are now available to take a new call.

Putting a call on hold

6. Click the `Hold` button.

Retrieving a call from hold

7. Click the `Resume` button.

End of procedure

Next Steps

- There are no further steps.

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 in the following procedure:

Procedure: Transferring a call

Purpose: To transfer a call using either one of the two types of call transfers.

Start of procedure

Making a one-step transfer

1. Enter or select the number to which the call should be transferred to.
2. Click the `Blind transfer` button.

Making a two-step transfer

3. Click the `Consultative Transfer to` button.
4. After the initial interaction and consultation call are established, and the initial conversation with the other consulting party is over, click the `Complete transfer` button or the `Hang up` button.

End of procedure

Next Steps

- There are no further steps.

Making Conference Calls and Forwarding Calls

You can make two-step conference calls or forward calls, as described in the procedure below:

Procedure:
Making conference calls or forwarding calls

Purpose: To initiate a two-step conference call or to forward a call.

Start of procedure

Adding a conference call

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

Hanging up a call

3. Click the `Hang up` button.

Setting a call forward request

4. Enter the forwarding extension.
5. Click the `Set Forward` button. Calls are forwarded to this DN.

Cancelling a call forward request

6. Enter the forwarding extension.
7. Click the `Cancel Forward` button. Calls are received on the agent's DN.

End of procedure

Next Steps

- There are no further steps.

The Outbound Campaign Feature

The Outbound Campaign feature is meant for contact 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 85.

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

- Working with an Outbound call in Progressive or Predictive dialing mode
- Working with an Outbound call in ASM dialing mode

- Working with an Outbound Call in Preview dialing mode
- Working with an Outbound Call in Push Preview dialing mode

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 four different dialing modes:

- `Preview`
- `Predictive`
- `Progressive`
- `Push Preview`

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

The `Predictive` and `Progressive` modes are different, and utilize the Outbound Contact Server's (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.

In `Push Preview` mode, an agent automatically receives calling list record, previews it on a `Preview` screen, and then manually selects the outbound call to be dialed

To minimize the number of lost predictive calls during a mass log-out (for example—when everyone logs out at the end of a shift), 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 the dialing-in-advance calls until the appropriate logout 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 "The Controlled Logout Option" on page 90.

The Difference Between the Preview, Push Preview, Predictive Dialing, and Progressive Modes

Preview and Push Preview Dialing Modes

The `Preview` and `Push Preview` dialing modes are recommended for low-volume, high-value campaigns (see sample in Figure 28 on page 89).

Predictive Dialing Mode

The `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

The `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.

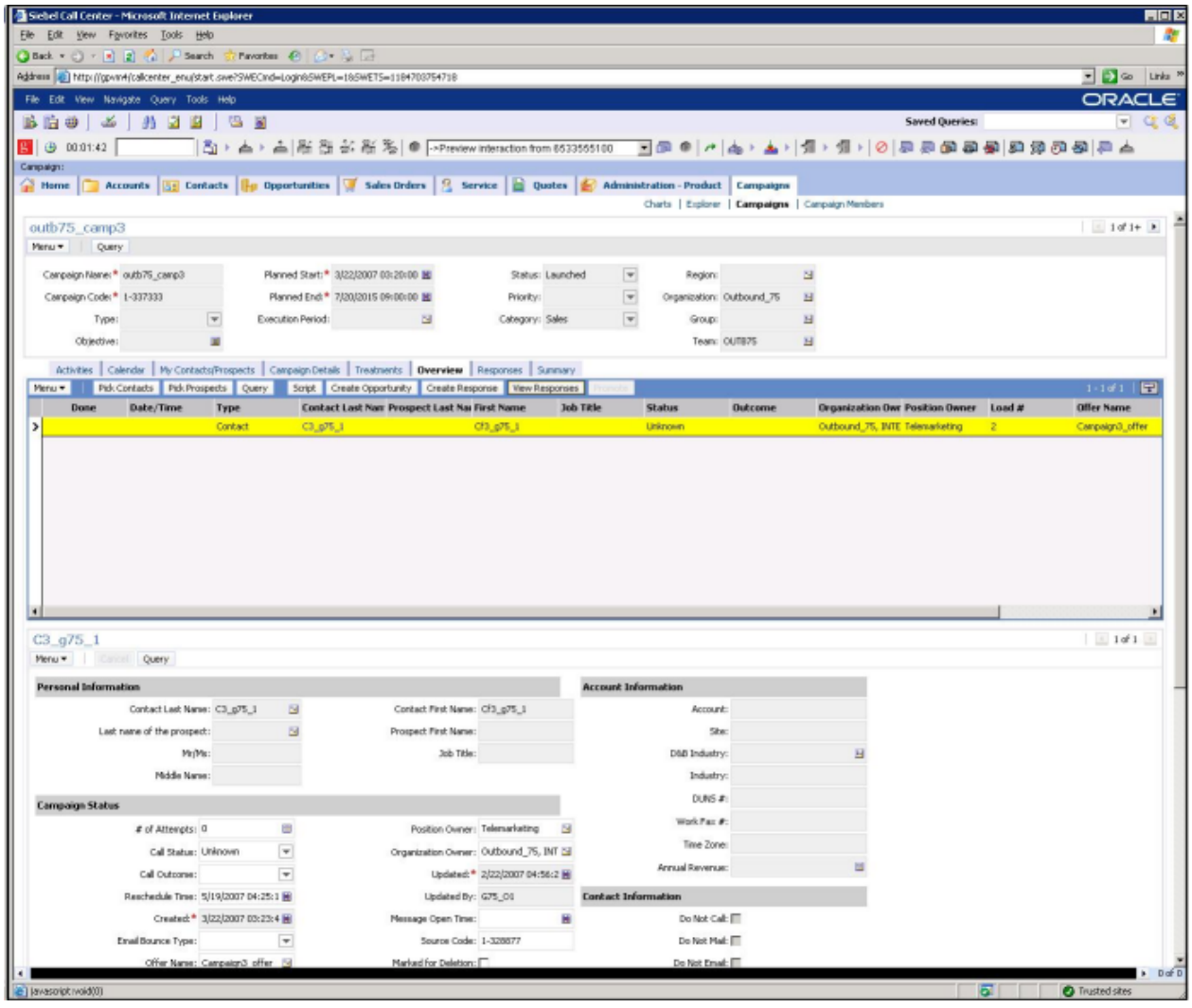

Figure 28: Preview Dialing Mode

The Controlled Logout Option

When using OCS, the controlled logout option is available to you. 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 Getting Started Guide*.

When using OCS with the G*plus* Adapter Outbound Campaign feature, and working in `Predictive` dialing mode with the controlled logout option functioning, the following circumstances and rules apply:

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 popup message appears. allowing the agent to select the reason for logout.

Refer to your System Administrator for details. The *Gplus Adapter for Siebel CRM Deployment Guide* contains setup details that provide additional information.

The Outbound Campaign Buttons and Controls

The Communication toolbar provides a set of Outbound Campaign buttons and controls, and their functions are described below. Because these functions 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 29 shows the Outbound Campaign toolbar and its buttons. The toolbar includes the `Mark Phone DNC` and the `Record Cancel` buttons, which are described in the next section.

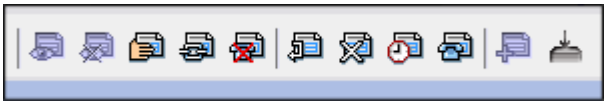

Figure 29: Controls for the Outbound Campaign functions

`Start Preview`: Starts the `Preview` dialing mode session. This button is enabled after an agent has logged into Genesys, when OCS is running, and the campaign is loaded and started. The `Stop Preview`/`Preview Mode Over` and `Request Record` buttons also are enabled.

`Stop Preview/Preview Mode Over`: Finishes the `Preview` dialing mode session. This button is enabled after the `Preview` dialing mode session is started.

Note: The agent cannot finish a `Preview` dialing mode session until there are no records on the agent's desktop.

`Request Record`: Sends a request to OCS for a new record. Upon delivery of the record to an agent's desktop, a Siebel popup screen appears with the customer information, and the record-handling buttons on the Communication toolbar are enabled.

`Request Chain Record`: Sends a 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 number, work phone number, 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 a record back to OCS server for further distribution to other agents. You can only reject a record if no operations have been performed on that record.

`Cancel Interaction`: Marks a record as `Canceled` and removes it from the desktop. The contact record is not delivered to any agent for calling during the current campaign.

Note: 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 record, the contact's record is included in the `Do Not Call` list and is not called again for any campaign. This operation marks the contact and the rest of chain as `Do Not Call` (DNC) so that the contact is not used in any future campaigns. There are several configuration options that exist (`Mark Phone DNC`, `Mark Record DNC`, `Mark Contact DNC`) that are based on the customer ID. The *G*plus *Adapter for Siebel CRM Deployment Guide* contains detailed information about DNC administration.

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

`Interaction Processed:` Completes the work on 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 CTI toolbar. If more records exist in the Work Items list, the agent's desktop screen refreshes and displays a popup 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 conference calls, refer to "About Transfer and Conference Calls" on page 86.

The Contact/Prospect Details View

Changes to the following fields on the `Contact/Prospect Details View` applet 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 OCS as an `UpdateCallStatus` command attribute `GSW_CALL_STATUS`. Refer to Figure 30 on page 93, below. Be aware that the OCS field showing the number of attempts is updated only while the `Preview` dialing mode is running. While in `Progressive` or `Predictive` dialing 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 Reference Guide.*

- `Call Status`: The status of a call sent to OCS as an `UpdateCallStatus` command attribute `GSW_CALL_STATUS`. For more information on this attribute, see the *Outbound Contact 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 OCS as an attribute of the `RescheduleRecord` command.

Figure 30 on page 93 shows the `Number of Attempts` dialog box.

Figure 30: Number of Attempts Dialog Box

Procedure: Working with an Outbound call in Progressive or Predictive dialing mode

Purpose: To process an outbound campaign call in `Predictive` or `Progressive` dialing mode.

Start of procedure

1. Click the `Ready` button to make yourself ready to take the call.

   OCS dials a call for you. When the call connects, OCS transfers it to you, and the drop-down box in your CTI 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 are displayed.

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 the Call Result Commands" on page 97 for details. The following options are available to you:
   a. Transfer or conference a call (see also "About Transfer and Conference Calls" on page 86 for related information)
   b. Update a record
   c. Schedule a callback (`Personal` or `Campaign` type)
   d. Add to the `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.

End of procedure

Next Steps

- There are no further steps.

Procedure: Working with an Outbound call in ASM dialing mode

Purpose: To process an Outbound Campaign call in `ASM` dialing mode.

Start of procedure

1. Click `Ready` to make yourself ready to take the call.

   The OCS dials a call for you.
2. Click `Accept Phone` to accept the call.

   After the call is established, OCS dials the contact. When the call connects, the OCS transfers it to you, and the drop-down box in your CTI 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 will 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 the Call Result Commands" on page 97 for details. The following options are available to you:

   a. Transfer or conference a call (see also "About Transfer and Conference Calls" on page 86 for related information).

   b. Update a record

   c. Schedule a callback (`Personal` or `Campaign` type)

   d. Add to the `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.

End of procedure

Next Steps

- There are no further steps.

Procedure: Working with an Outbound Call in Preview dialing mode

Purpose: To process an Outbound Campaign call in `Preview` dialing mode.

Start of procedure

1. Click the `Preview Dialing Mode Start` button.
2. Click the `Preview Record Request` button.
3. Click the `Make Call` button on the CTI toolbar to dial the call.
4. The following options are available to you (for descriptions of these options, see "Using the Call Result Commands" on page 97):

   a. Transfer or conference (see also "About Transfer and Conference Calls" on page 86 for related information)

   b. Update record

   c. Schedule a new call time (`Personal` or `Campaign` type)

   d. Add to `Do Not Call` list

5. To finish the call:

   Select `Update record` to save the customer's information.
   You are ready to take the next call.

End of procedure

Next Steps

- There are no further steps.

Procedure: Working with an Outbound Call in Push Preview dialing mode

Purpose: To process an Outbound Campaign call in `Push Preview` dialing mode.

Start of procedure

1. Log in to Multimedia and Voice.
2. Make yourself ready for the `Push Preview` media type.
3. Click the `Accept Multimedia Interaction` button to accept the interaction.
4. Click the `Make Call` button on the CTI toolbar to dial the call.
5. The following options are available to you (for descriptions of these options, see "Using the Call Result Commands"):
   a. Transfer or conference a call (see also "About Transfer and Conference Calls" on page 86 for related information)
   b. Update a record
   c. Schedule a new call time (`Personal` or `Campaign` type)
   d. Add to the `Do Not Call` list

Rejecting Push Preview Interactions

6. An incoming `Push Preview` interaction creates a new work item on the CTI toolbar, and the `Accept incoming interaction` button starts blinking. Click `Reject` to reject an interaction that was accepted in error.
7. To finish the call:

   Select `Update record` to save the customer's information.
   You are ready to take the next call.

End of procedure

Next Steps

- There are no further steps.

Figure 31 on page 97 displays the `Push Preview` dialing mode.

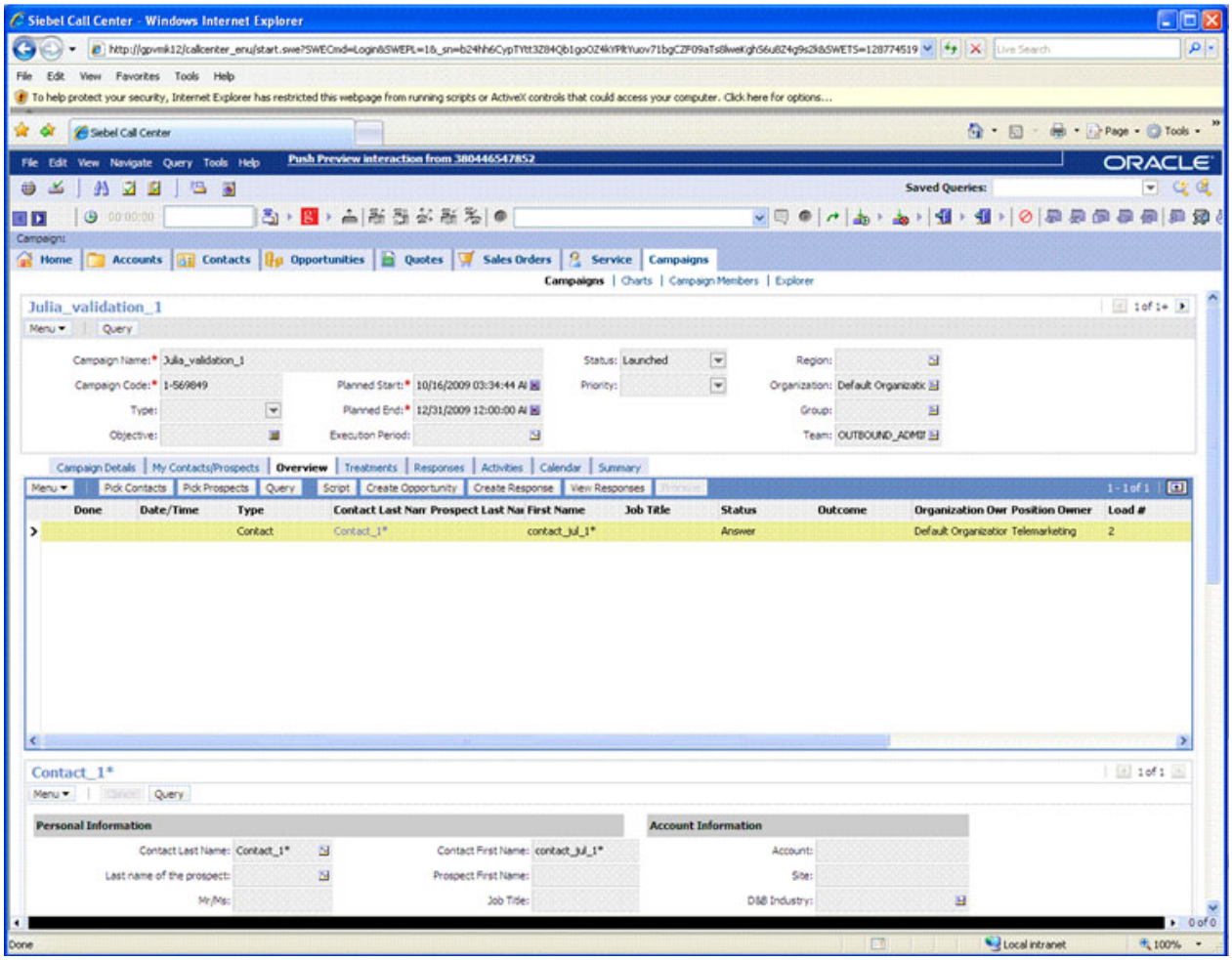

Figure 31: Push Preview Dialing Mode

Using the 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 a record. You can automatically switch between the `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`: Reschedules 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`: Reschedules a call and has that call delivered to any agent in the campaign group when the callback occurs. This type is the default value for a record.

  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`: Assigns a customer to the `Do Not Call` list. When added to this list, the customer does 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 is saved. This record is updated in OCS with the same call result.

These call result commands involve OCS functions. For more information about call results, see the Genesys *Outbound Contact Deployment Guide.*

Descriptions of Treatment Types

A treatment type is used to tell OCS 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 following treatment types for unsuccessful call results:

- `Personal`
- `Campaign`

Select only one treatment type for each record.

The Universal Callback Feature

Working with the Universal Callback Server

This section presents simple scenarios that illustrate different ways of working with the Universal Callback Server (UCB) 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 Interactive Voice Response (IVR) side. After creating the callback request, the next step is to change an agent to the `Ready` state and wait for a callback request to be distributed from the voice callback queue.

Figure 32: Universal Callback Toolbar Buttons

Procedure:
Examples of different ways to utilize the UCB-enabled Siebel Call Center application

Purpose: To illustrate examples of different ways to utilize the UCB-enabled Siebel Call Center application.

Start of procedure

Initiate a Callback Call

1. To initiate a callback call (in `Callback Preview` mode)
   a. After the callback interaction is delivered to the agent and the `Contact` screen is displayed, click the `Make Call` button on the toolbar. This initiates a call to the number that was specified in the `VCB_CONTACT` key.
   b. To initiate a callback to a different number:
      i. Enter a new phone number in the `Phone` field on the toolbar,

      or

      ii. Select and highlight any text on the agent's desktop and click `Initiate Callback`.

      These options will initiate a call to the selected number.

Add a Callback Call

2. To add a callback call (see Figure 33 on page 100):
   a. Create a new `Activity` record.
   b. Set the type to `Call`.
   c. Set the priority level:
      i. Set to `ASAP`

      or

      ii. Set to `Other than ASAP` and also set the `Due` time.
   d. Specify the Routing Point.
   e. Save the record.
   f. Select `Home` or `Work` phone number on the `Contact` applet.
   g. Click the `Add` button.

      On the status line, the message `"Callback to phone number 4151234567 has been added"` is displayed.

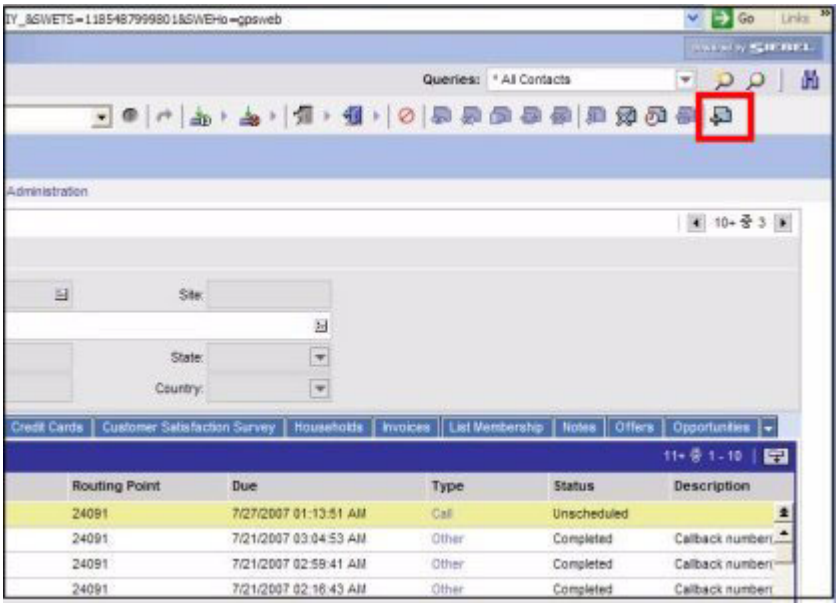

Figure 33: Add a Callback Call

Cancel a Callback Call

3. To cancel a callback call:
   a. Locate the `Callback` record.
   b. Click the `Cancel` button.
      On the status line, the message `"Callback to phone number 4151234567 has been cancelled"` is displayed.

Reschedule a Callback Call

4. To reschedule a callback call:
   a. Locate the `Callback` record.
   b. Set the `Due time`.
   c. Change the priority to `non "ASAP"`.
   d. Save the record.
   e. Click the `Reschedule` button.
      On the status line, the message `"Callback to phone number 4151234567 has been rescheduled"` is displayed.

End of procedure

Next Steps

- There are no further steps.

The Expert Contact Feature

The Expert Contact Feature Controls

The Expert Contact feature controls are the `On Call` or `Off Call` buttons.

Working with the Expert Contact Interactions

The following procedure is an example of how to work with Expert Contact interactions.

Procedure: Working with the Expert Contact interactions

Purpose: To illustrate an example of how to work with the Expert Contact interactions.

Start of procedure

1. Log in as an agent and select the `Ready` button.
2. Click 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 popup 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` dialling mode) installation when the `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 the standard procedures for the call. The newly created call will reuse an 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 may 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.

End of procedure

Next Steps

- There are no further steps.

The Confirm Status Option

If an expert forgets to use the desktop to indicate that they have 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, and an expert is on the call after the length of time set by the timer, a dialog box appears. This dialog box prompts the expert to answer if they are still on the call, and if they want 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.

The Multimedia Component

This section describes how to use the Multimedia Component's e-mail and chat features.

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

Controlling the Agent Status

Multimedia Login/Logout

The Multimedia login buttons are shown in Figure 34. The Multimedia logout buttons are shown in Figure 35 on page 103.

Figure 34: Multimedia Login Buttons

Figure 35: Multimedia Logout Buttons

Setting the Ready/NotReady States Per Media Channel

The group buttons are provided so that the agent can put themselves into the `Ready` or `NotReady` state for all channels. To set the agent into the `Ready` state *per channel*, use the individual buttons. Refer to Figure 36.

Figure 36: Ready/NotReady Buttons

Navigating to the Current Work Item View

When an agent accepts a multimedia interaction (such as Genesys E-mail, Genesys Chat, or Siebel E-mail), the required view automatically opens for all supported Siebel versions.

When an agent navigates to any other view and then wants to navigate back to the view which corresponds to the active work item, they should do the following:

- For Siebel versions prior to 8.1.1.11/8.2.2.4, navigate to the `Genesys` application tab. The required view opens automatically.
- For Siebel versions 8.1.1.11/8.2.2.4 or later, click the `Navigate to Work Item View` toolbar button, which is located to the left of the work item combo box (see Figure 37).

Figure 37: Navigate to Work Item View button

Working with Genesys E-mail Interactions

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

- Receiving Genesys E-mail Interactions
- Using the Contacts and Address Book Functions
- Replying to Genesys E-mail Interactions

Receiving Genesys E-mail Interactions

To receive an inbound Genesys E-mail interaction, the agent should log into Siebel as `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 `Accept` to start working with the interaction. After the interaction is accepted, the new work item appears in the list and the Adapter automatically displays the e-mail contents (see Figure 38 on page 104).

Note: If the e-mail body is larger then 16KB, then the entire original message body is saved as an attachment, and a message stating 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 message.

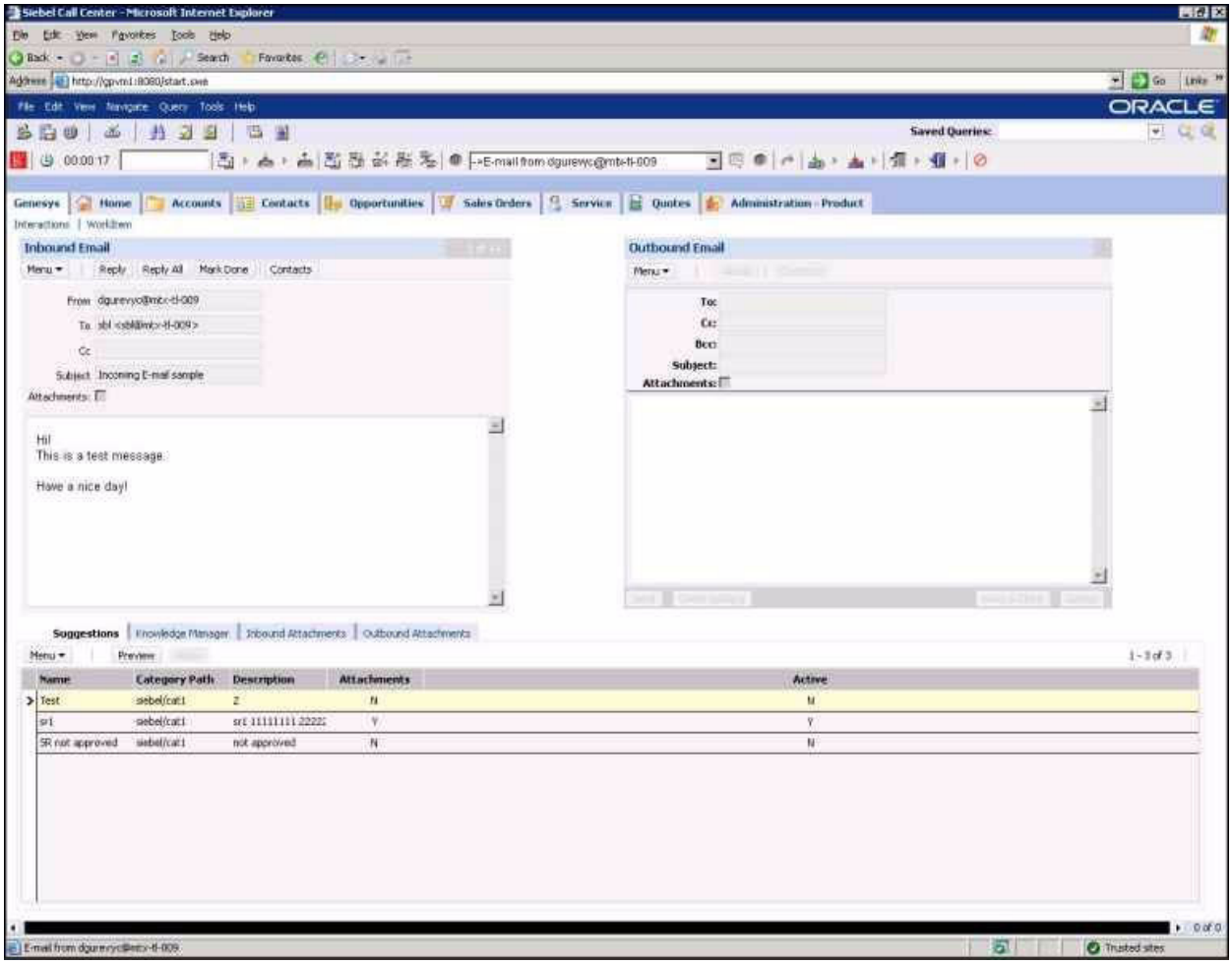

Figure 38: Receiving Genesys E-Mail

At this time, an 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 Interactions" on page 107).

Using the Contacts and Address Book Functions

Contacts

The Contacts function enables you to retrieve extended information about the contacts using the `To:`, `CC:`, and `BCC:` fields.

At this time, an agent can perform the following actions:

For Inbound e-mail—the agent can automatically receive information about the contacts after the email is accepted. See Figure 39 on page 105.

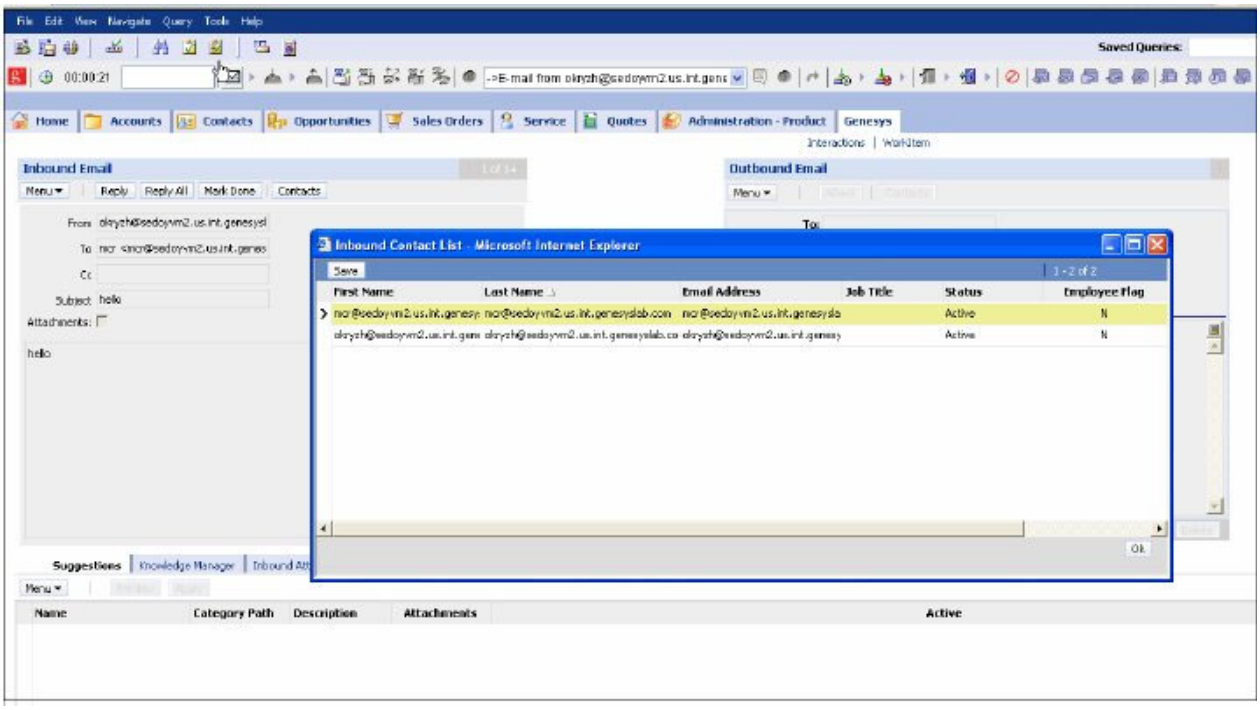

Figure 39: Inbound Contact

For Outbound e-mail—the contacts information is applied after the `To:`, `CC:`, and `BCC:` fields information is entered. This information can be entered either manually, or by using the Address Book (`ABook`). See Figure 40.

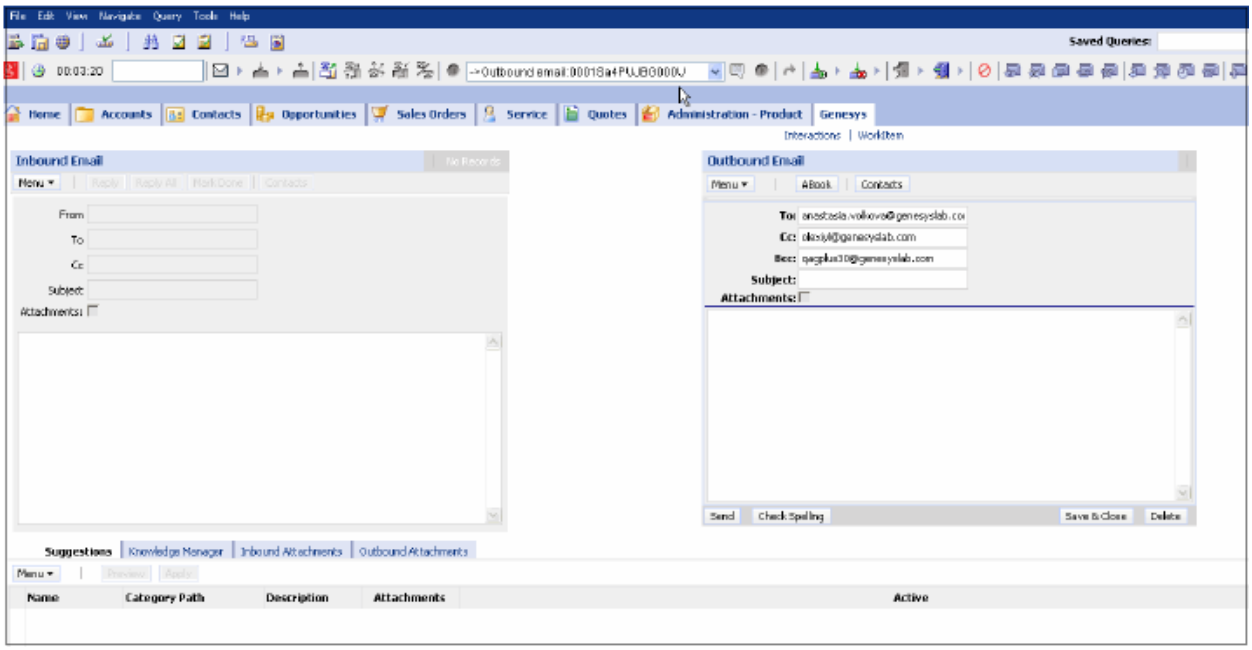

Figure 40: Outbound Email

Note: If the manually entered e-mail address is new, save the information in the Outbound Contact List. The contact is then added to the ABook. See Figure 41.

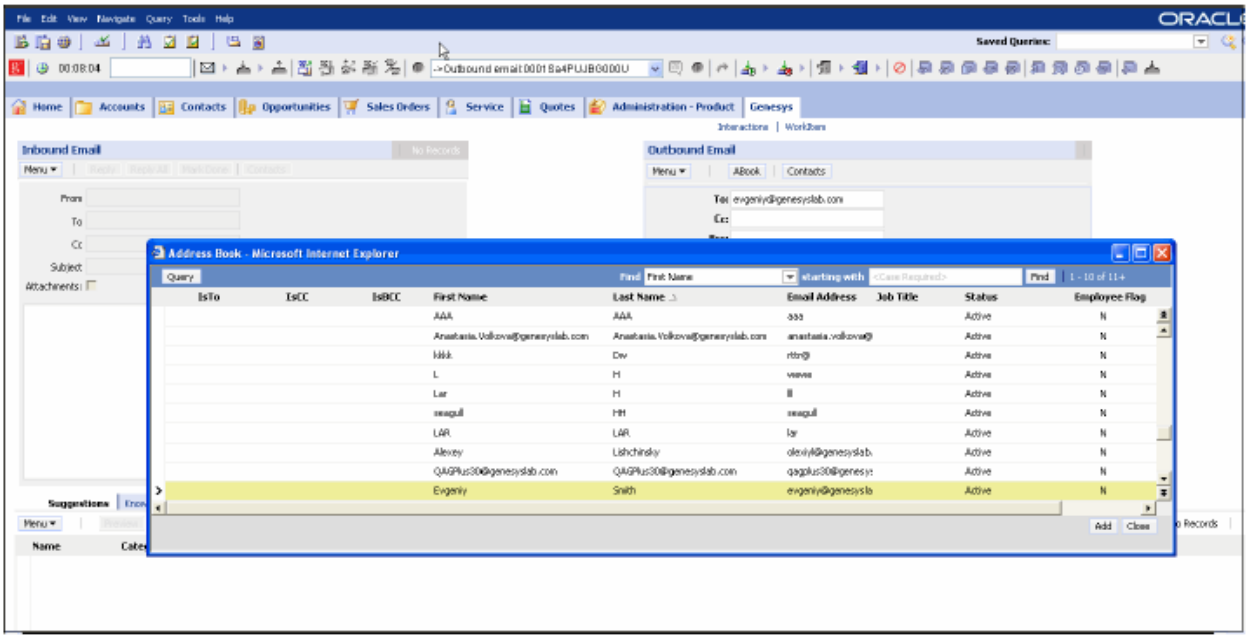

Figure 41: New Outbound Contact in Address Book

Address Book The Address Book (`ABook`) allows an agent to choose contacts from a list.

The agent must change the value to either `N` or `Y` for each of the mandatory fields `IsTo:`, `IsCC:`, and `IsBCC:`. Click `Add` to submit the changes. See Figure 42 on page 107.

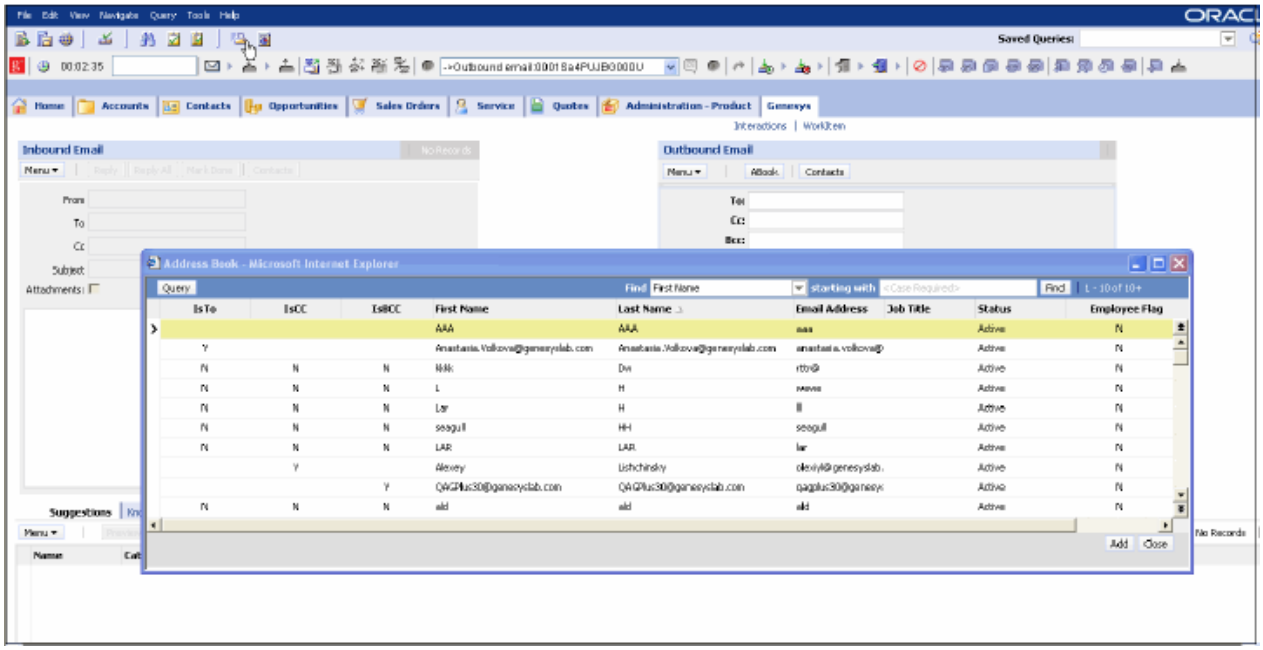

Figure 42: Address Book (ABook)

Replying to Genesys E-mail Interactions

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

The reply interaction is created as a child interaction of the inbound interaction. Screen navigation is automatically performed by the Adapter. On this screen, both the inbound and outbound interactions are displayed as shown in Figure 43 on page 108. E-mail formatting (HTML or plain text) of the created e-mail depends on the format of the inbound e-mail. If the inbound e-mail is formatted as plain text, the reply is created as plain text. If the inbound e-mail is formatted as HTML, the reply is created as an HTML e-mail. See Figure 43 on page 108.

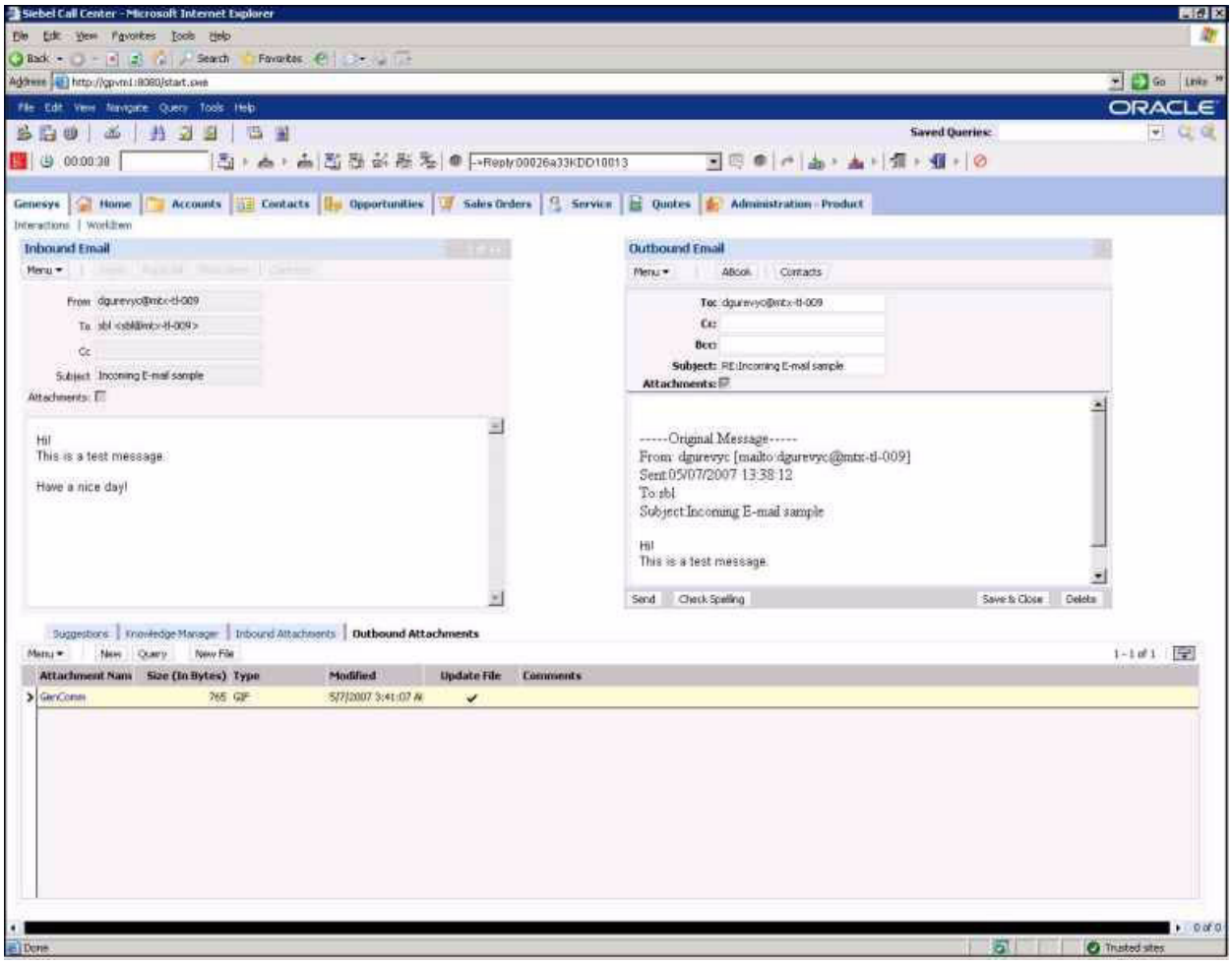

Figure 43: Replying to Genesys E-Mail

The initial content of the outbound interaction contains 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, is 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 are filled depending on which action (`Reply` or `Reply All`) was requested.

In this mode, the agent can attach files, edit the `To:` (`Cc:`) field 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.

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

- Transfer a prepared outbound reply to be processed by another agent.
- Transfer a prepared outbound reply to the queue to be processed by another agent group.
- Send an e-mail reply.
- Save the interaction to be processed at another 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 is stored, as shown in Figure 44.

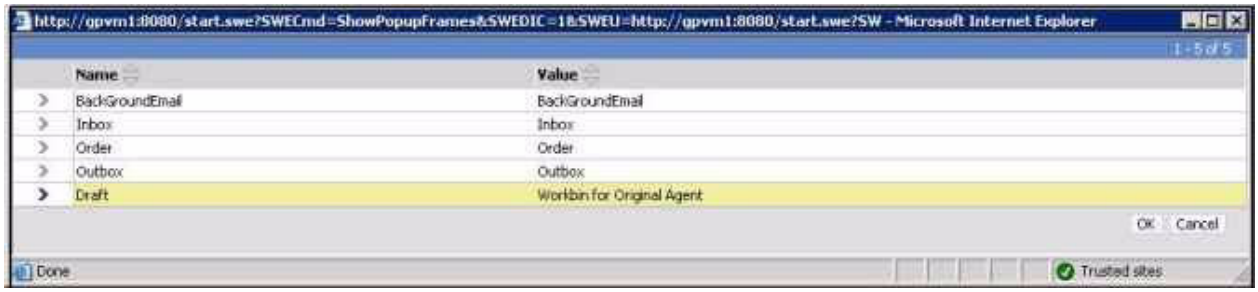

Figure 44: Workbin List

The agent can open a saved interaction at any time to continue processing, as shown in Figure 45 on page 110.

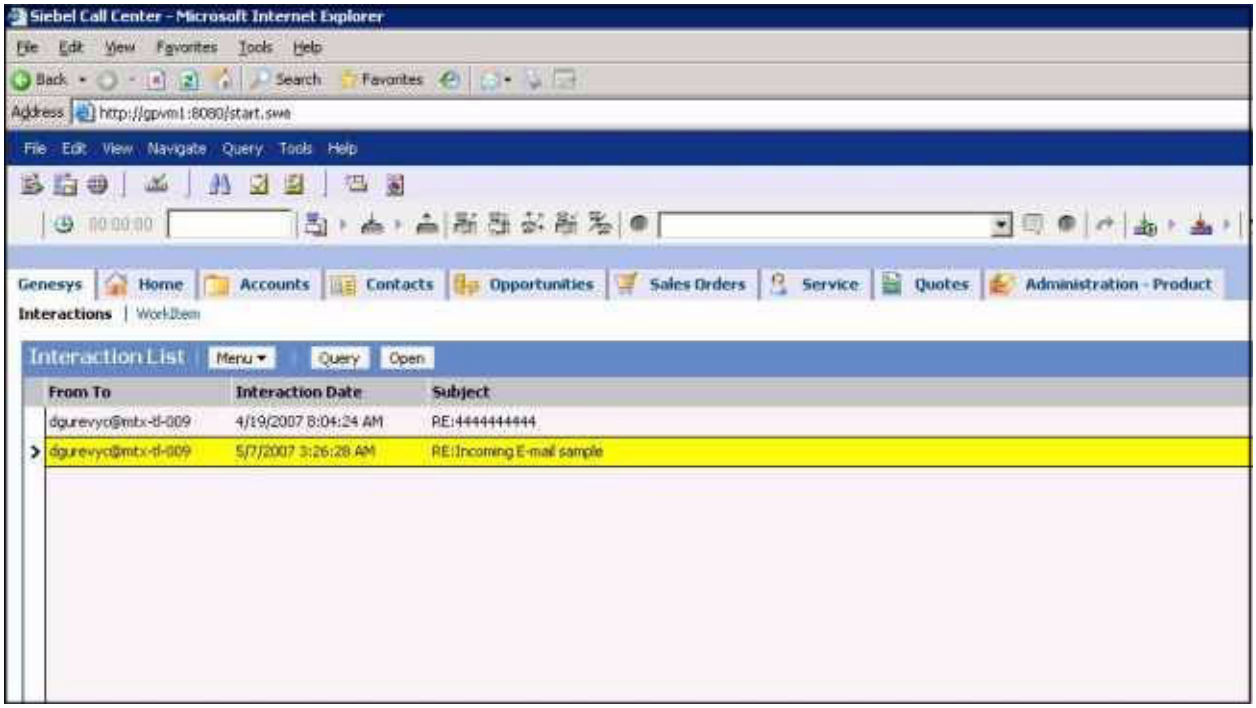

Figure 45: Interaction List

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

Working with the Chat Client

The G*plus* Siebel Multimedia chat client allows the handling of chat sessions originating from Genesys-compatible chat clients.

Procedure: Working with the G*plus* Siebel Multimedia chat client

Purpose: To use the G*plus* Siebel Multimedia chat client.

Start of procedure

1. The client connects to the chat service from a Genesys-compatible chat application (see Figure 46).

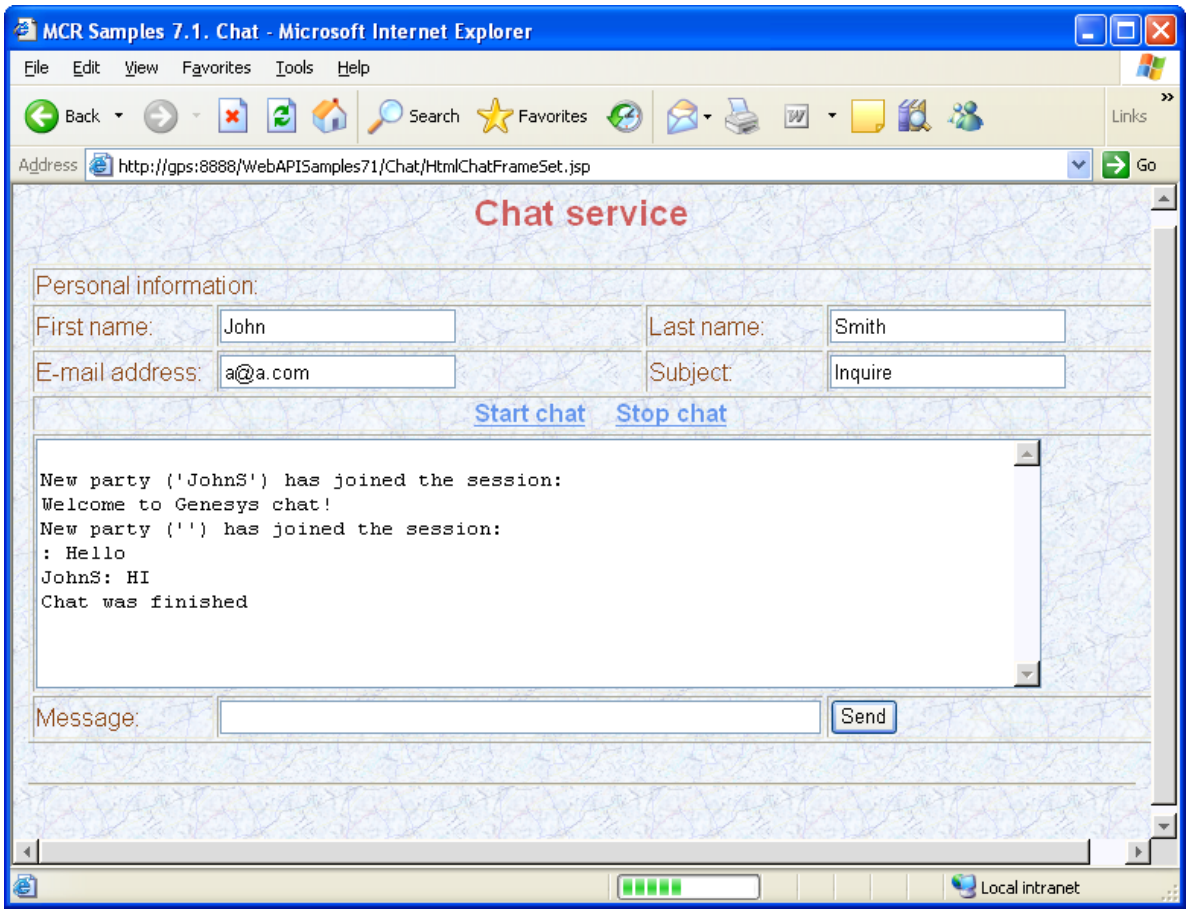

Figure 46: Client Connects to Chat Service

2. The agent logs in and sets themselves to `Ready` state. A chat request is distributed to the agent. (see Figure 47).

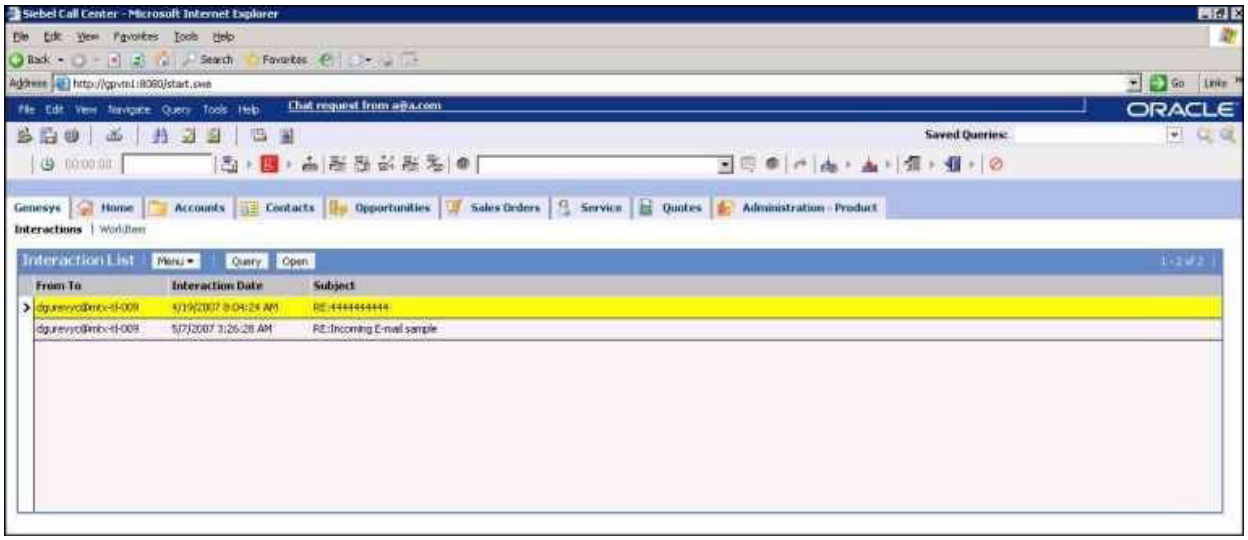

Figure 47: Agent Receives Chat Request

3. The agent clicks the `Accept` button to accept the interaction and opens the Genesys Multimedia chat screen with Knowledge Manager and Standard Response Library (SRL). (See Figure 48).

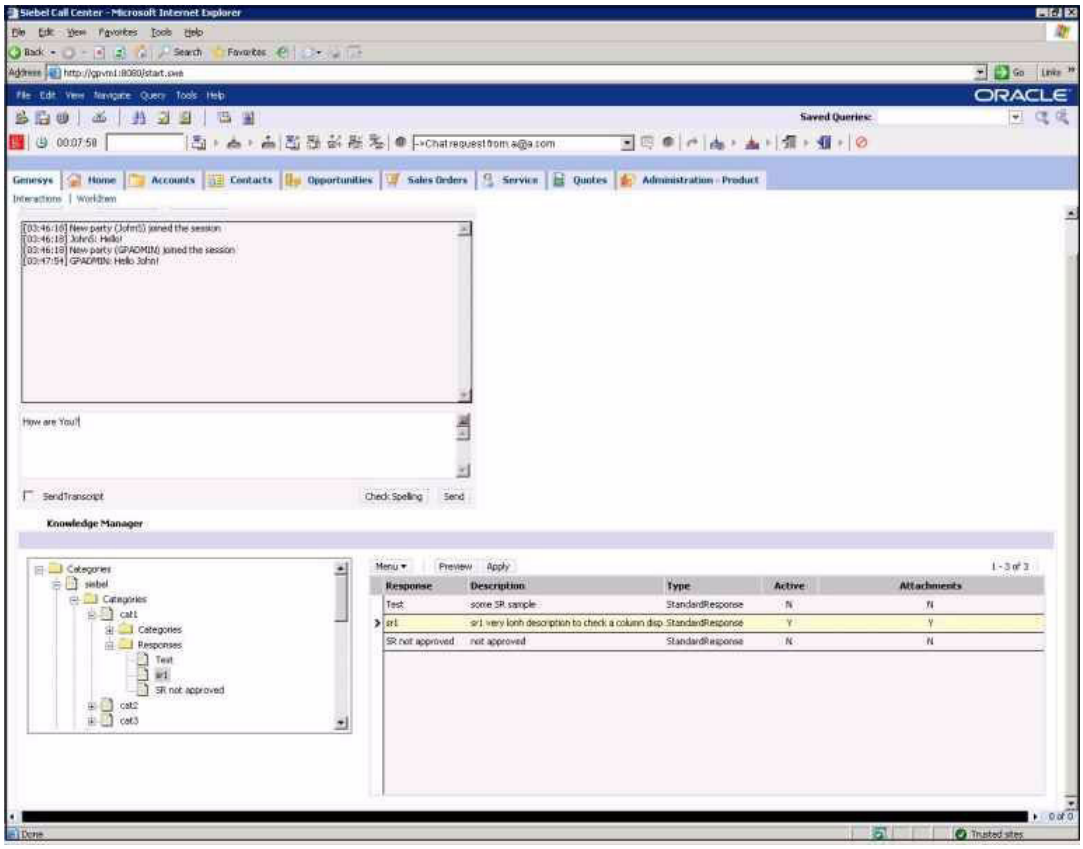

Figure 48: Chat Screen Opens

4. The agent and client send messages to each other to conduct a chat session (see Figure 49). While typing a message, the agent can check the spelling using a standard Siebel spell checker. By default, the newer messages appear on the bottom of the chat window. The administrator can configure the chat transcript direction as desired.

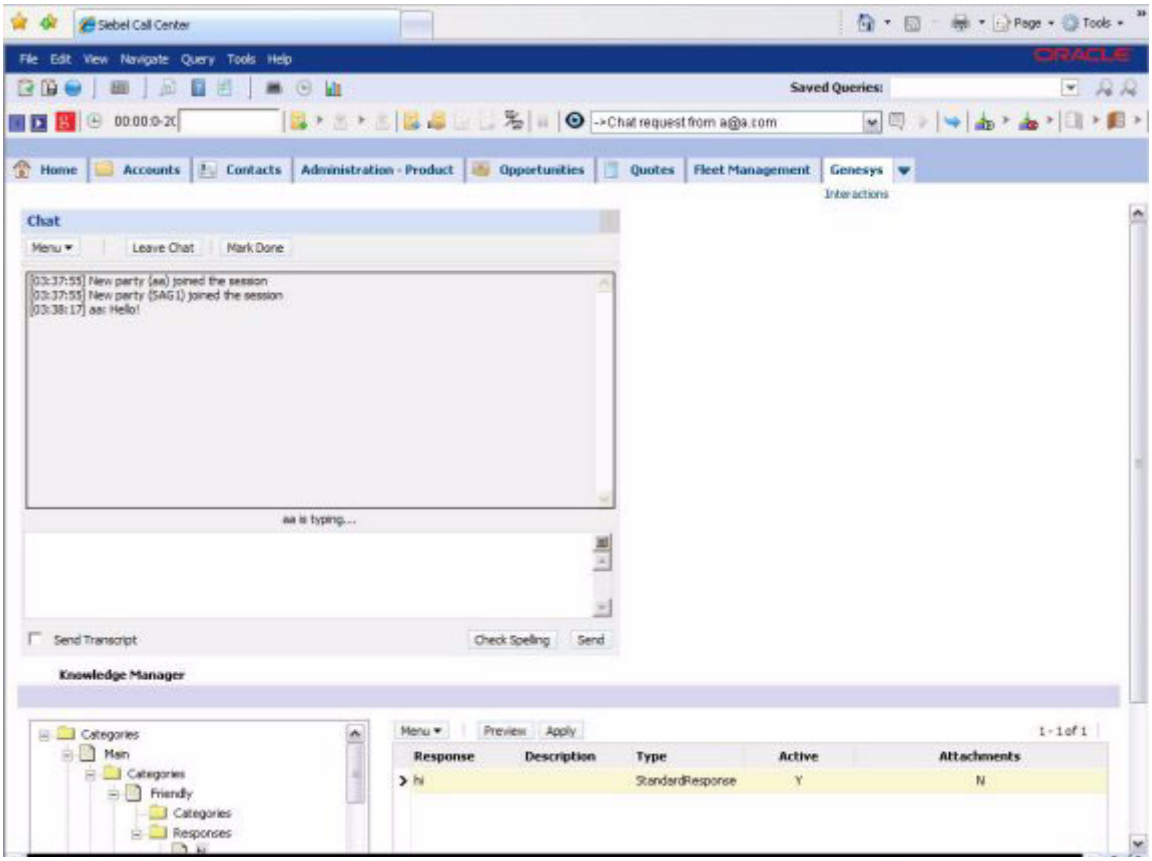

Figure 49: Chat Session Proceeds

If the Chat Server supports the corresponding functionality, notifications are shown below the chat transcript control when the client is typing (see Figure 49). In addition, these notifications are sent from the agent site to the client site. You can assume that the agent is typing when the focus is in the input message control; you can assume the agent has stopped typing when the focus is elsewhere.

5. If a chat message arrives when the appropriate chat interaction is *not* active, a special toolbar button becomes active and "blinking" (see Figure 50 on page 114). This button allows the agent to quickly make the appropriate chat session active.

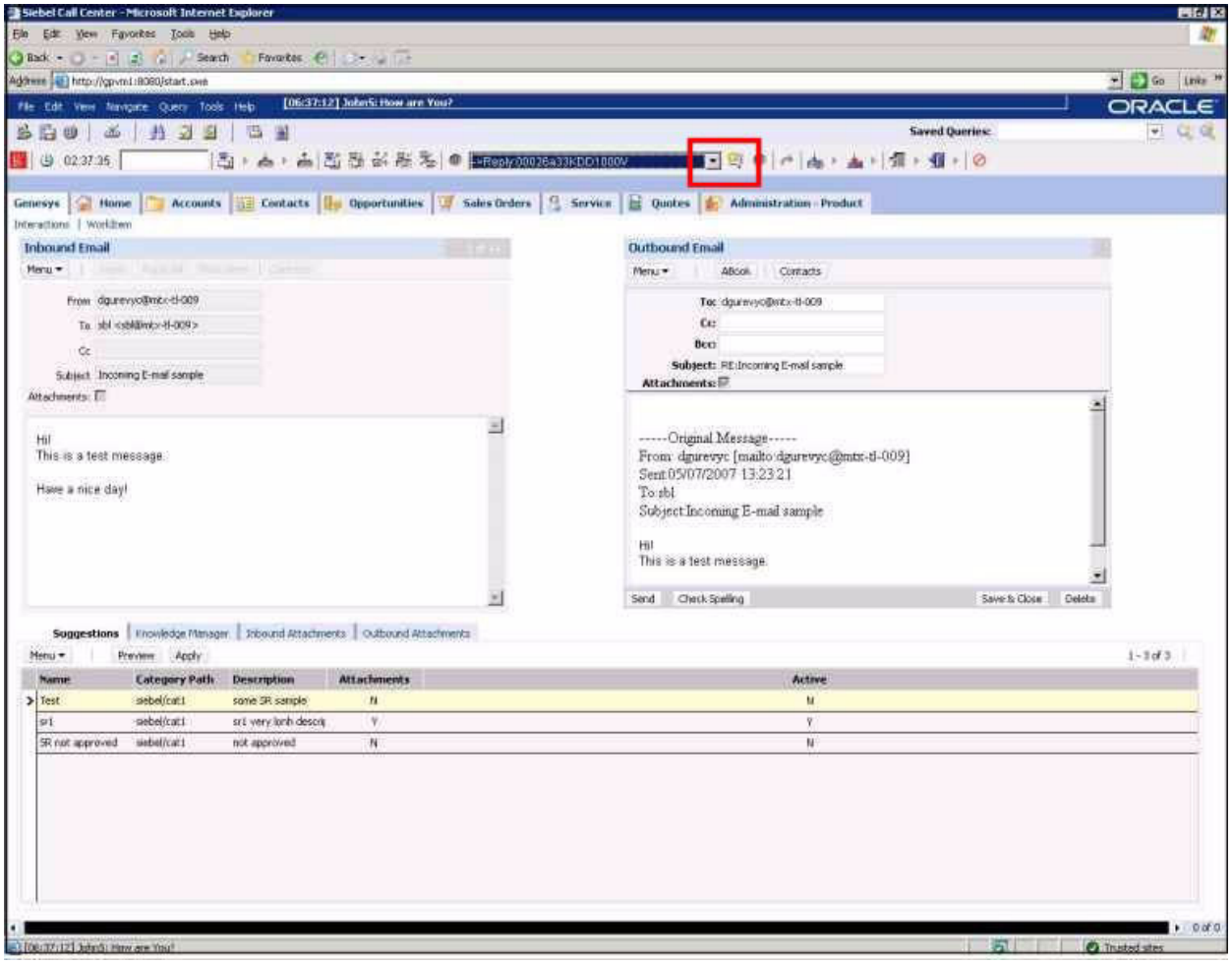

Figure 50: Make Appropriate Chat Session Active

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 goes offline, the agent can look at the transcript and perform some post-processing activities (see Figure 51).

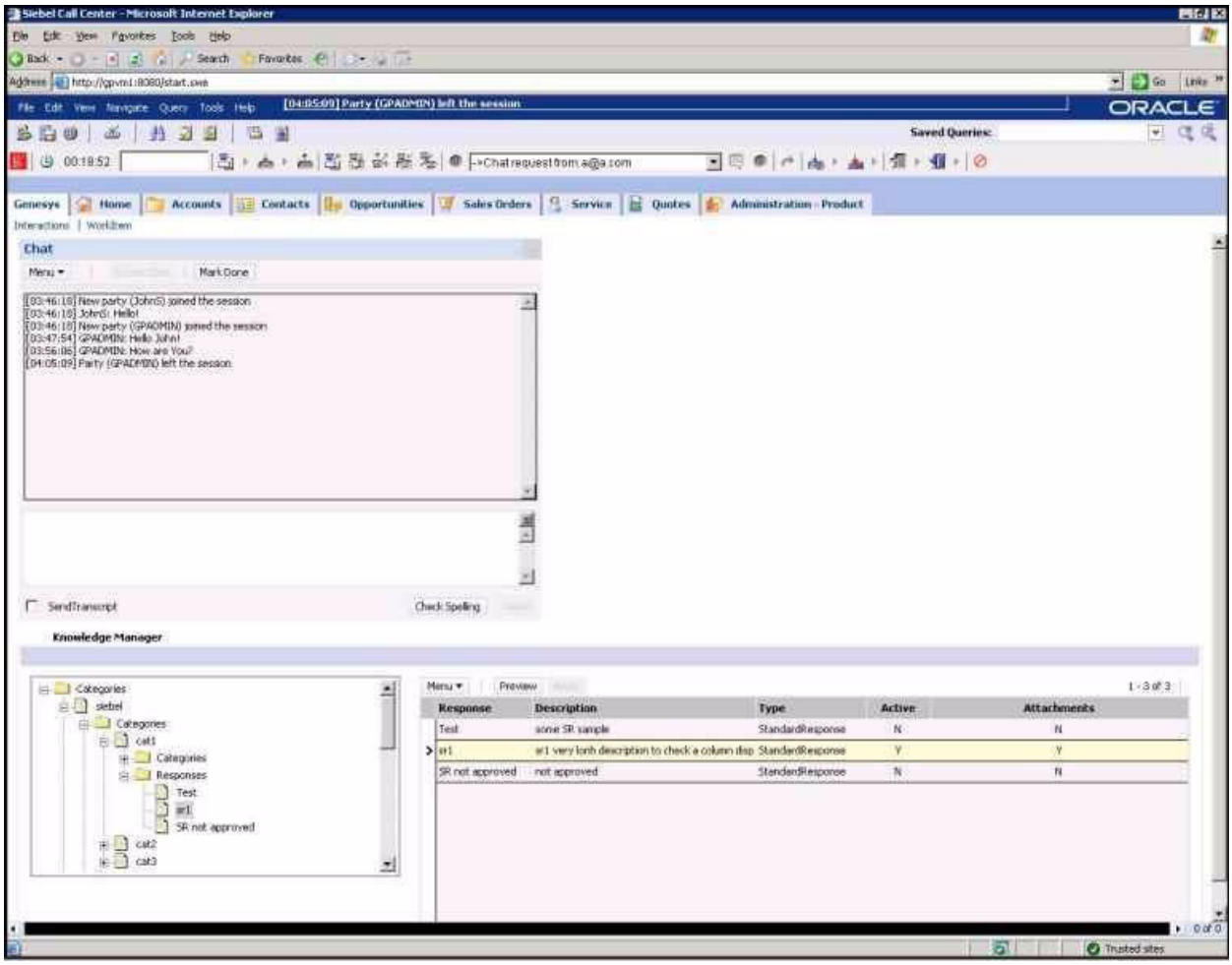

Figure 51: Chat Session Concludes

7. To completely remove the chat interaction from the desktop, the agent must use the `Mark Done` button.

Note: It is possible to configure the transcript function so 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. Consult your administrator about these configuration preferences.

End of procedure

Next Steps

- There are no further steps.

Transferring Genesys E-Mail and Chat Interactions

Whenever an 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.

Procedure:
Siebel prior to 8.1.1.4/8.2.2.4: Transferring Genesys e-mail and chat interactions

Start of procedure

1. Click the `Transfer` button on the CTI toolbar (see Figure 52).

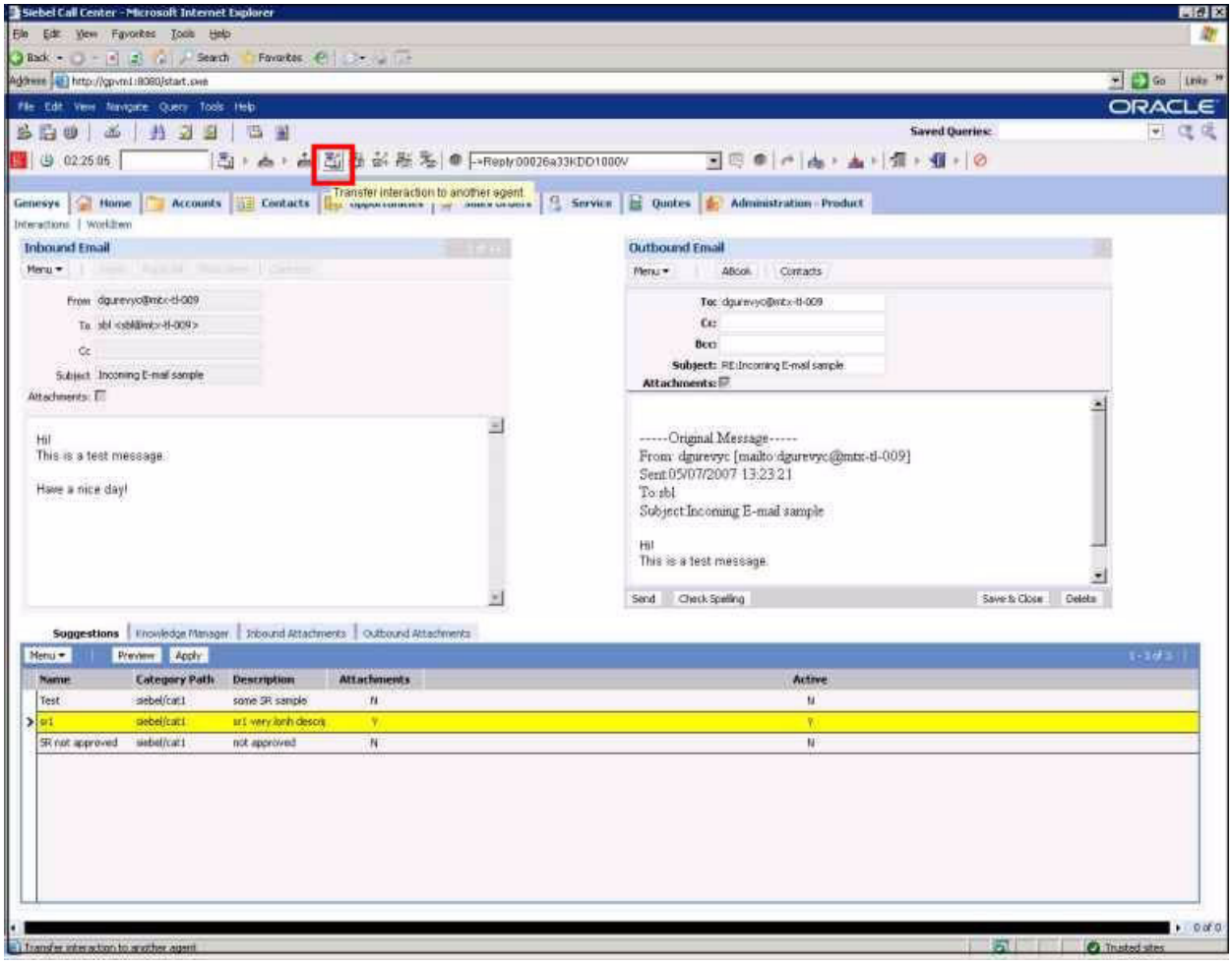

Figure 52: Transfer E-Mail or Chat

After you click the `Transfer` button, the applet for transferring an interaction to an agent appears (see Figure 53).

2. Choose an agent to whom you wish to transfer.

3. Switch to the applet for transferring an interaction to a queue (see Figure 54).

   The applet for transferring an interaction to a queue allows switching to the applet for transferring to an agent as well.

Figure 53: Transferring an Interaction to an Agent

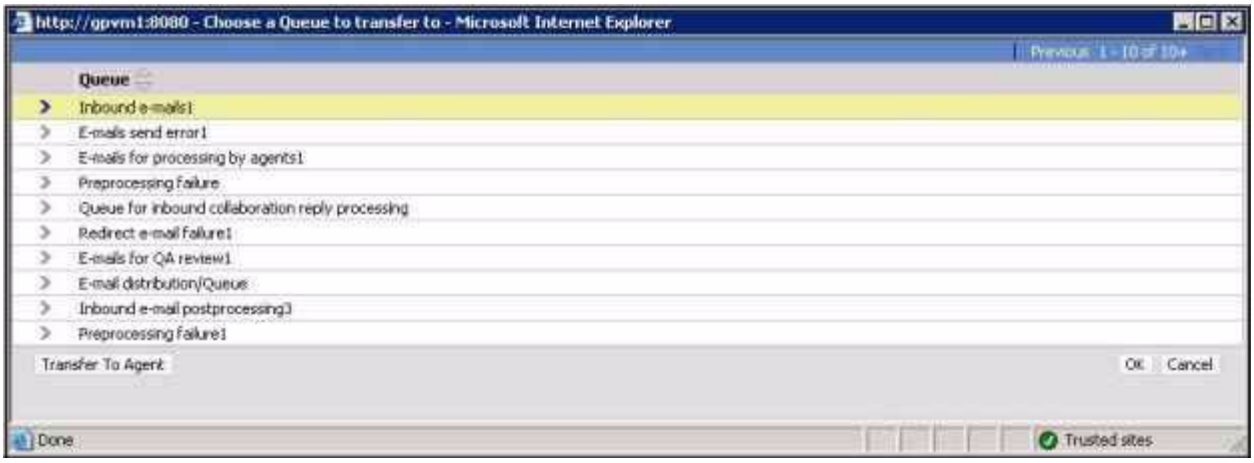

Figure 54: Transferring an Interaction to a Queue

End of procedure

Next Steps

- There are no further steps.

Procedure:
Siebel 8.1.1.4/8.2.2.4 or later: Transferring Genesys e-mail and chat interactions to an agent

Start of procedure

1. Click the `Transfer interaction to another agent` button on the CTI toolbar (see Figure 55).

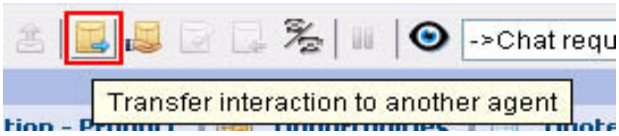

Figure 55: Transfer E-mail or Chat to an Agent button

After you click the `Transfer interaction to another agent` button, the applet for transferring an interaction to an agent appears (see Figure 56).

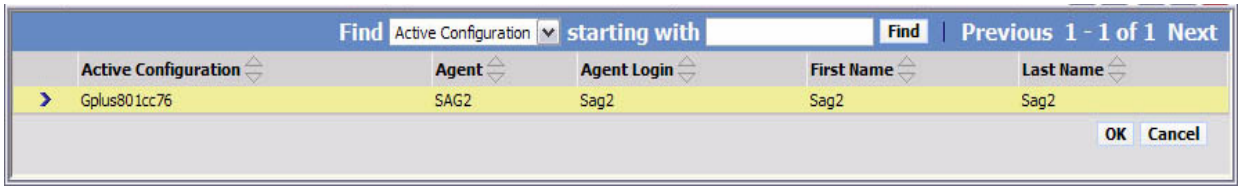

Figure 56: Transferring an Interaction to an Agent applet

2. Choose an agent to whom you wish to transfer.

End of procedure

Next Steps

- There are no further steps.

Procedure:
Siebel 8.1.1.4/8.2.2.4 or later: Transferring Genesys e-mail and chat interactions to a queue

Start of procedure

1. Click the Transfer Interaction to Queue button on the CTI toolbar (see Figure 57).

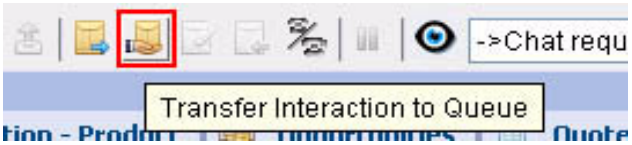

Figure 57: Transfer E-mail or Chat to a Queue button

After you click the Transfer Interaction to Queue button, the applet for transferring an interaction to a queue appears (see Figure 58).

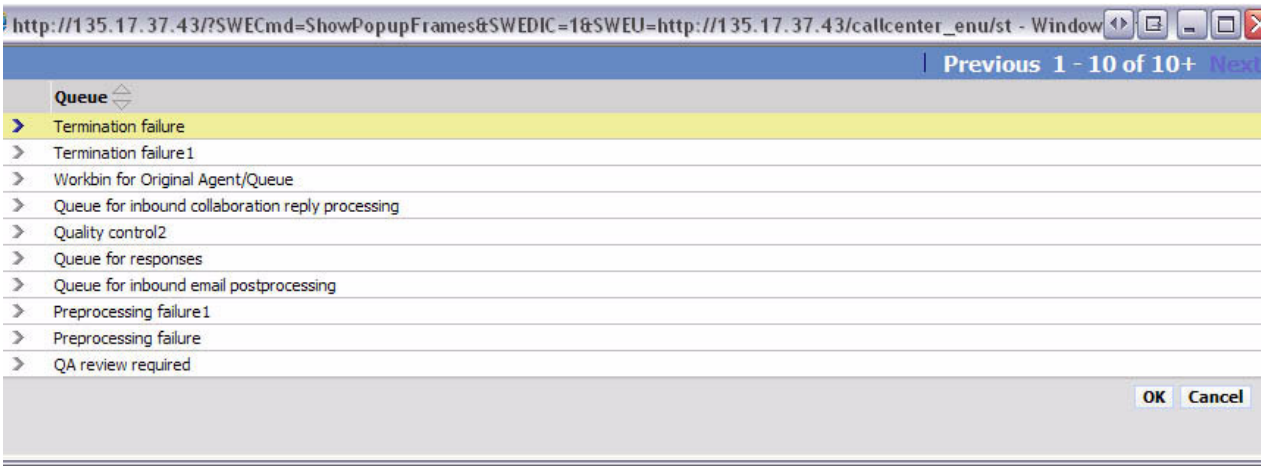

Figure 58: Transferring an Interaction to a Queue applet

2. Choose a queue you wish to transfer to.

End of procedure

Next Steps

- There are no further steps.

Working with Multiple Interactions Using the Genesys Standard Response Library

The 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, which enables the insertion of 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 that allows navigation through categories and subcategories. For each category and subcategory, a list of standard responses is provided as shown in Figure 59 on page 120.

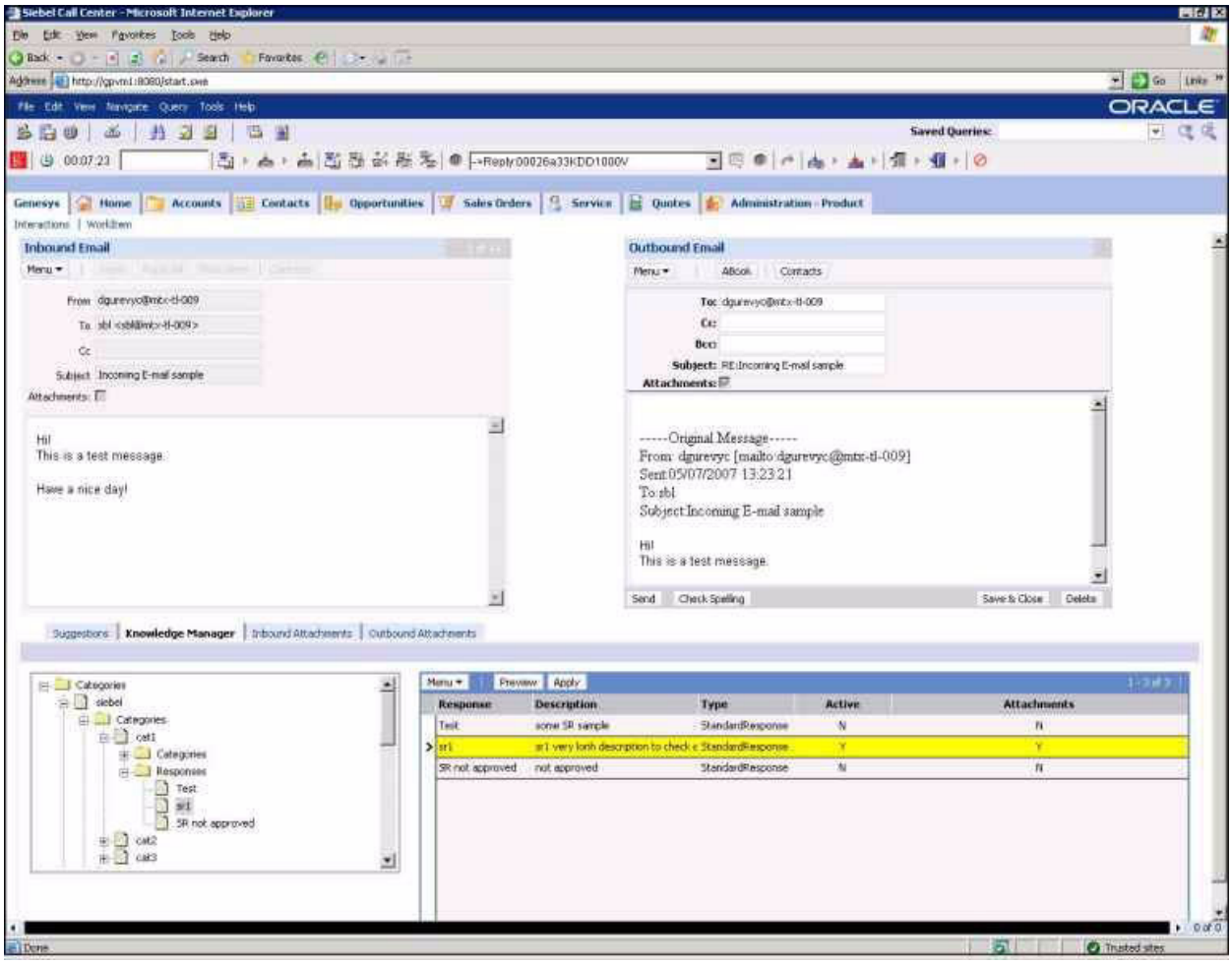

Figure 59: Standard Response Library - Knowledge Manager Tab

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

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

The `Preview` button shows a rendered response including field codes, if any. A sample of a standard response preview is shown in Figure 60 on page 121.

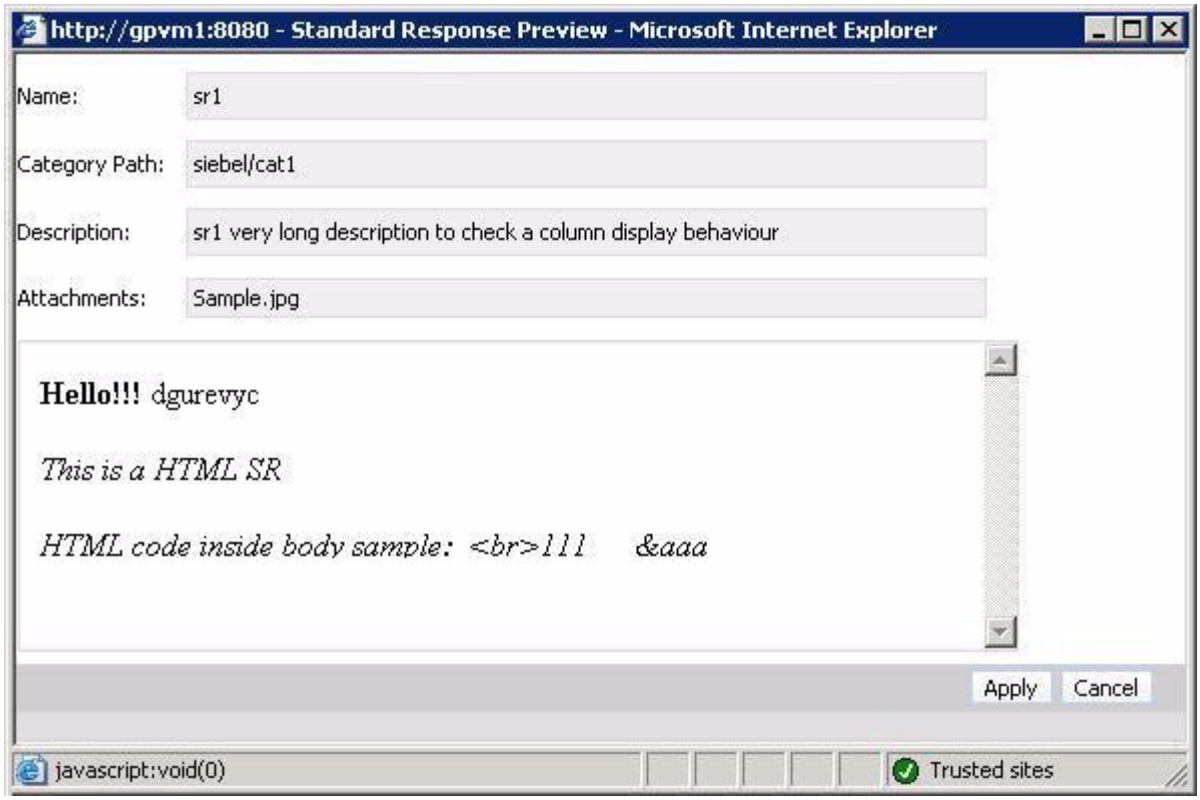

Figure 60: Standard Response Preview Sample

The standard response preview is available for both inbound and outbound interactions.

When an outbound interaction is active, the `Apply` button is enabled. This button allows the insertion of the 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 61 on page 122. The `Preview` and `Apply` buttons are also available here to preview or insert any chosen response.

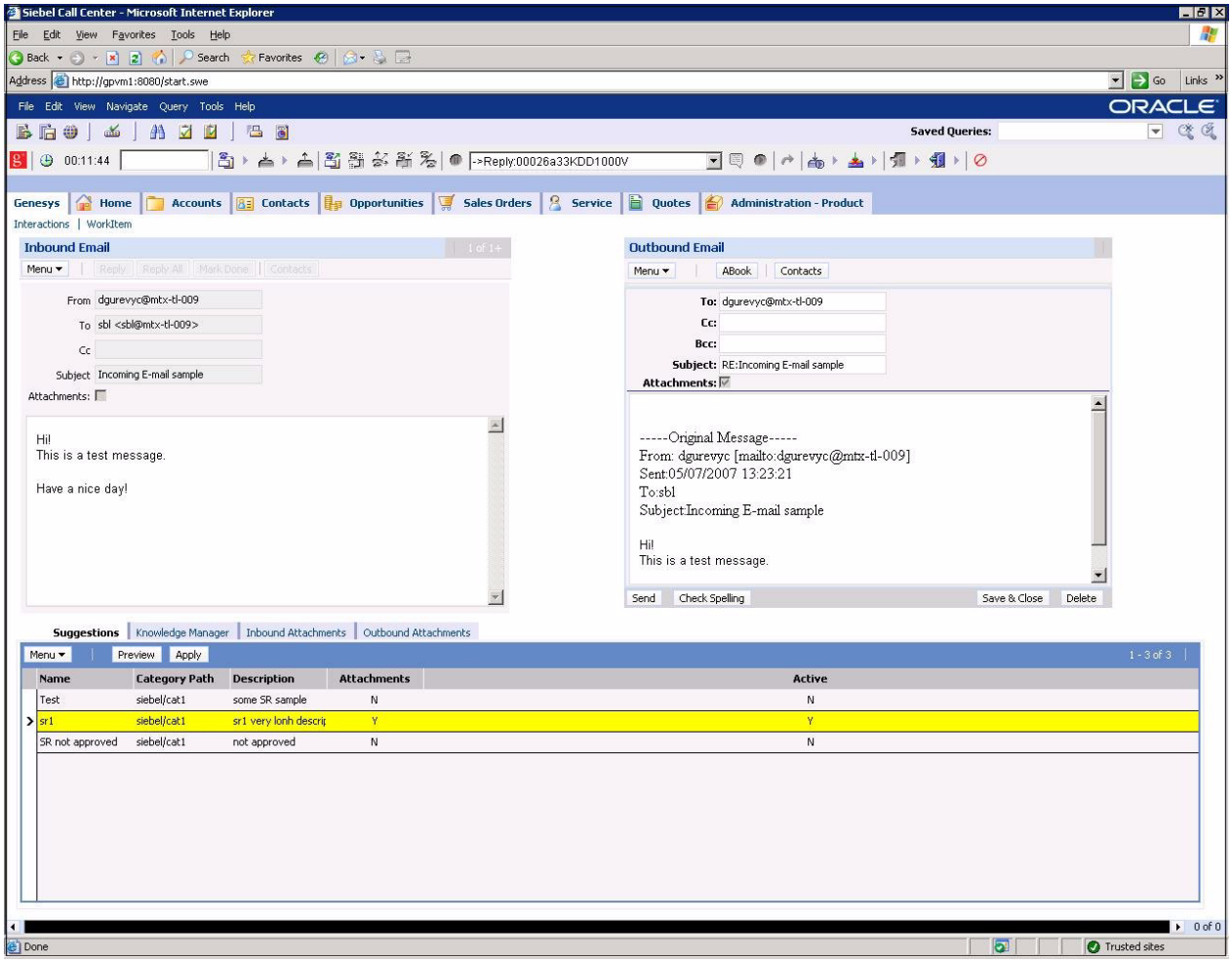

Figure 61: Standard Response Library - Suggestions Tab

The Media Routing Component

Desktop Controls for Processing Siebel eMail Interactions

The desktop controls used by agents to process Siebel eMail interactions are similar to other e-mail processing programs. See a description of the 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, so Siebel administrator customization is required. Consult your Siebel administrator about desktop controls for particular types of interaction processing. Usually, the `Login`, `Logout`, and `Accept` buttons are standard for any interaction type, if they are not customized differently by your Siebel administrator.

Procedure:
Using the desktop controls to process Siebel eMail interactions

Purpose: To use the desktop controls to process Siebel eMail interactions.

Start of procedure

Accepting E-mail Messages

1. When a new e-mail message arrives, the icon shown in Figure 62 blinks, and a notification message displays. To accept the new e-mail message, click the `Accept` button.

Figure 62: Incoming E-Mail Icon

2. The view for the new interaction is displayed.

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

Logging out of the Media Types

3. To log out of the Adapter, click the `Agent Sign Off` button (see Figure 63). This will log you out from all media types you are currently logged into.

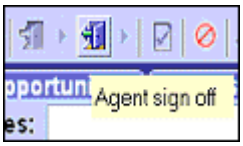

Figure 63: Agent Sign Off Button

End of procedure

Next Steps

- There are no further steps.

Working with Siebel eMail Interactions Using the Media Routing Component

The following are examples of how to work with Siebel eMail interactions using the Media Routing Component. The basic controls are the standard Siebel controls.

Procedure:
Working with Siebel eMail interactions using the Media Routing Component

Purpose: To work with Siebel eMail interactions using the Media Routing Component.

Start of procedure

Logging into a Media Type

1. Put yourself into the `Ready` state.
2. Select the `E-mail` button.
3. Refer to the instructions for "Making Yourself Ready or Not Ready" on page 80.

   After you have logged into a media type, the toolbar changes back to how it appears in Figure 63 on page 123; only now, the `Agent sign off` button is available.

Responding to eMail Interactions

4. Click `Ready` so you can accept any new interactions.
   You will be notified of a new e-mail message.
5. Click the flashing icon shown in Figure 64 to accept the incoming e-mail message.
   The `Communications` tab appears and the customer information is displayed on the screen.

Figure 64: Incoming Genesys Interaction Icon

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

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

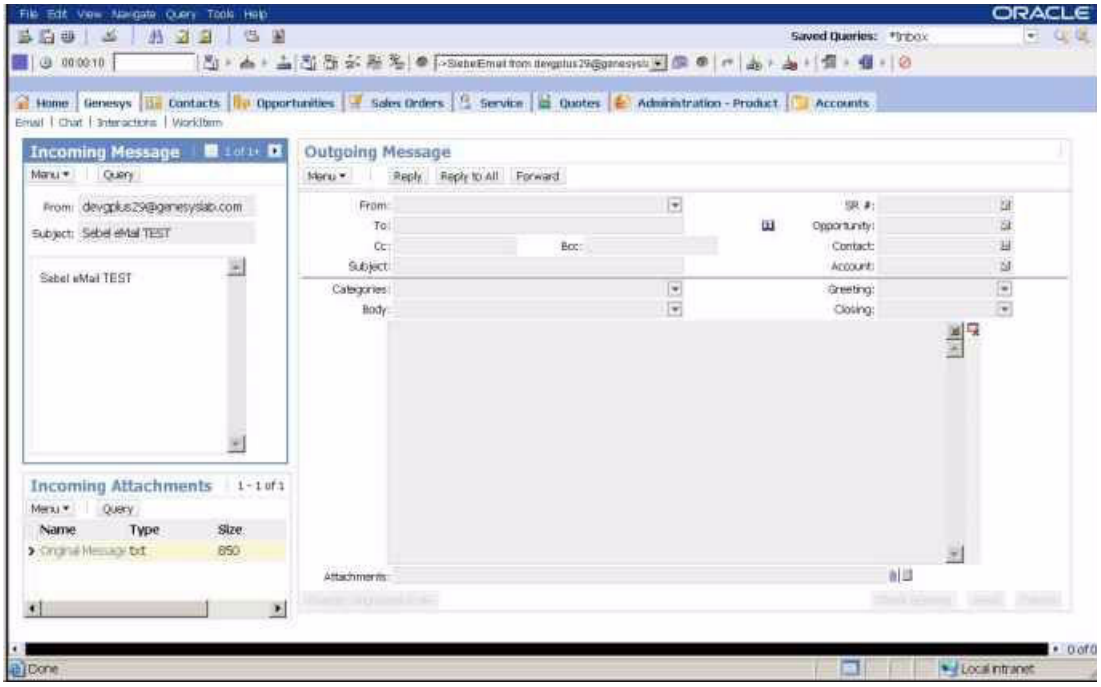

Figure 65: Siebel eMail Interaction View for Siebel prior to 8.1.1.11/8.2.2.4

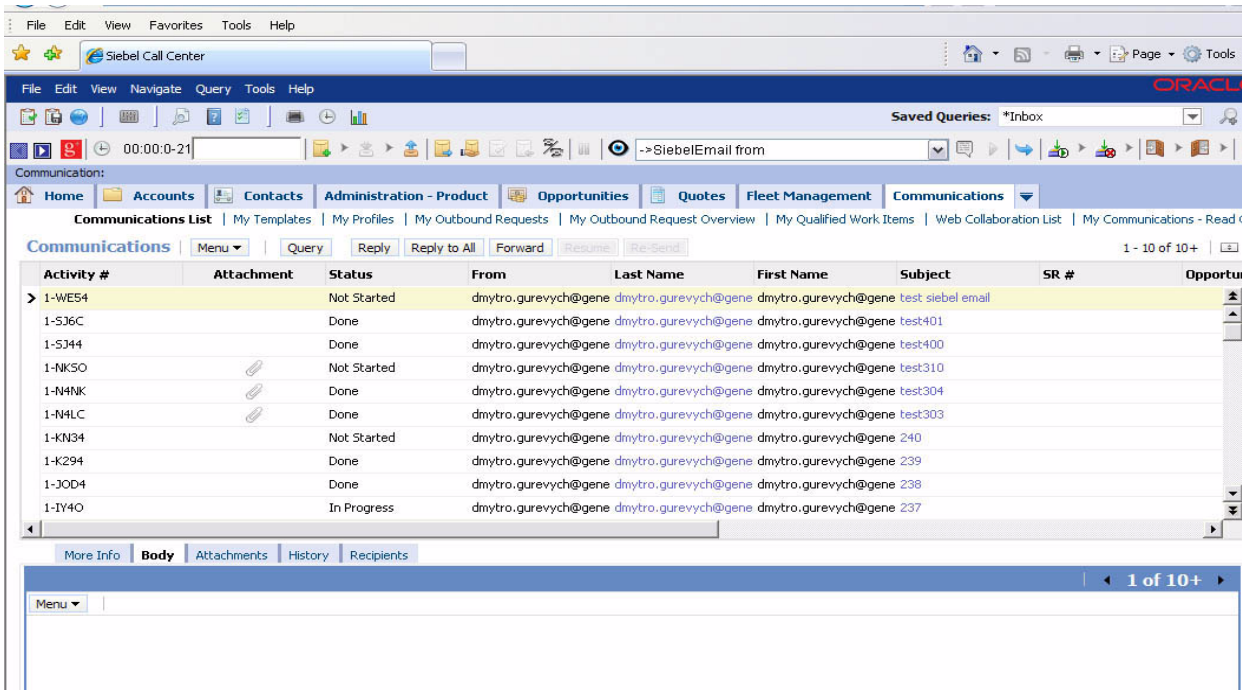

Figure 66: Siebel eMail Interaction View for Siebel 8.1.1.11/8.2.2.4 or later

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

Transferring a Siebel eMail interaction

10. Perform the transfer operation the same as for Genesys E-Mail or Chat. See “Transferring Genesys E-Mail and Chat Interactions” on page 116.

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

Working with Siebel eMail Interactions Running in the Background

11. To view Siebel eMail interactions running in the background, click the `Genesys` view tab and select the `Email Folders` view. You will see a list of interactions as shown in Figure 67.

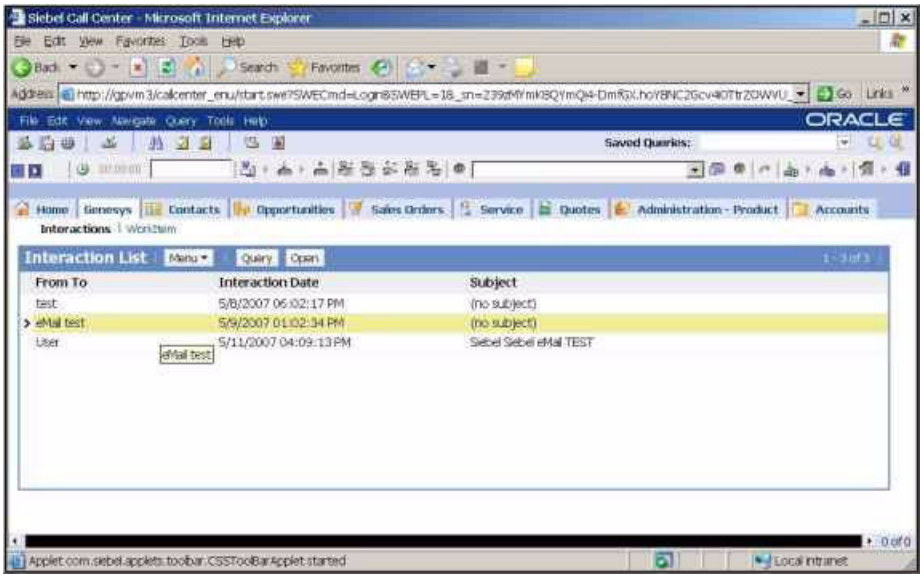

Figure 67: Background Interactions

12. Select an interaction and click the `Open` button. The view with the selected Siebel eMail interaction will open, and you can work with it as with an ordinary e-mail.

End of procedure

Next Steps

- There are no further steps.

Logging Out of the Siebel Server

This section describes how to log out of the Siebel Server.

Procedure: Logging out after finishing a call

Purpose: To log out after finishing a call.

Start of procedure

1. Click the `Not Ready` button.

   This will put you in the `NotReady` mode, and no interactions are sent to you.

2. Select a `NotReady` 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 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, 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 Siebel 8 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 does not reflect your actual state.

End of procedure

Next Steps

- There are no further steps.

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 an 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 them with the reason you received.

Chapter

5 Information for Administrators

This chapter includes information for the administrators of the G*plus* Adapter for Siebel CRM.

This chapter includes the following sections:

Features for Administrators

This section describes the major features to help administrators manage the G*plus* Adapter for Siebel CRM:

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

- Support for a wide range of telephony hardware. Contact Genesys for a list of fully-tested switch configurations.
- 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.

Logging In to the Siebel Server as an Administrator

You log into the Siebel Server as an administrator in the same way as you log in as an agent (see "Logging Into the Siebel Server" on page 78).

Accessing the Administration-Communications Functions

This section describes how to access the `Administration-Communications` screen where you can configure the communication data.

Procedure: Accessing the Administration-Communications Functions

Purpose: To access the `Administration-Communications` functions.

Start of procedure

1. Log in to the Siebel application using an administrative user account.
2. Using the Siebel Communications menu, select `View > Site Map > Administration - Communications`.

   The `Administration - Communications` screen displays.
3. Access the `Administration-Communication` functions by selecting the links listed on the `Home` tab. See Figure 68 on page 131.

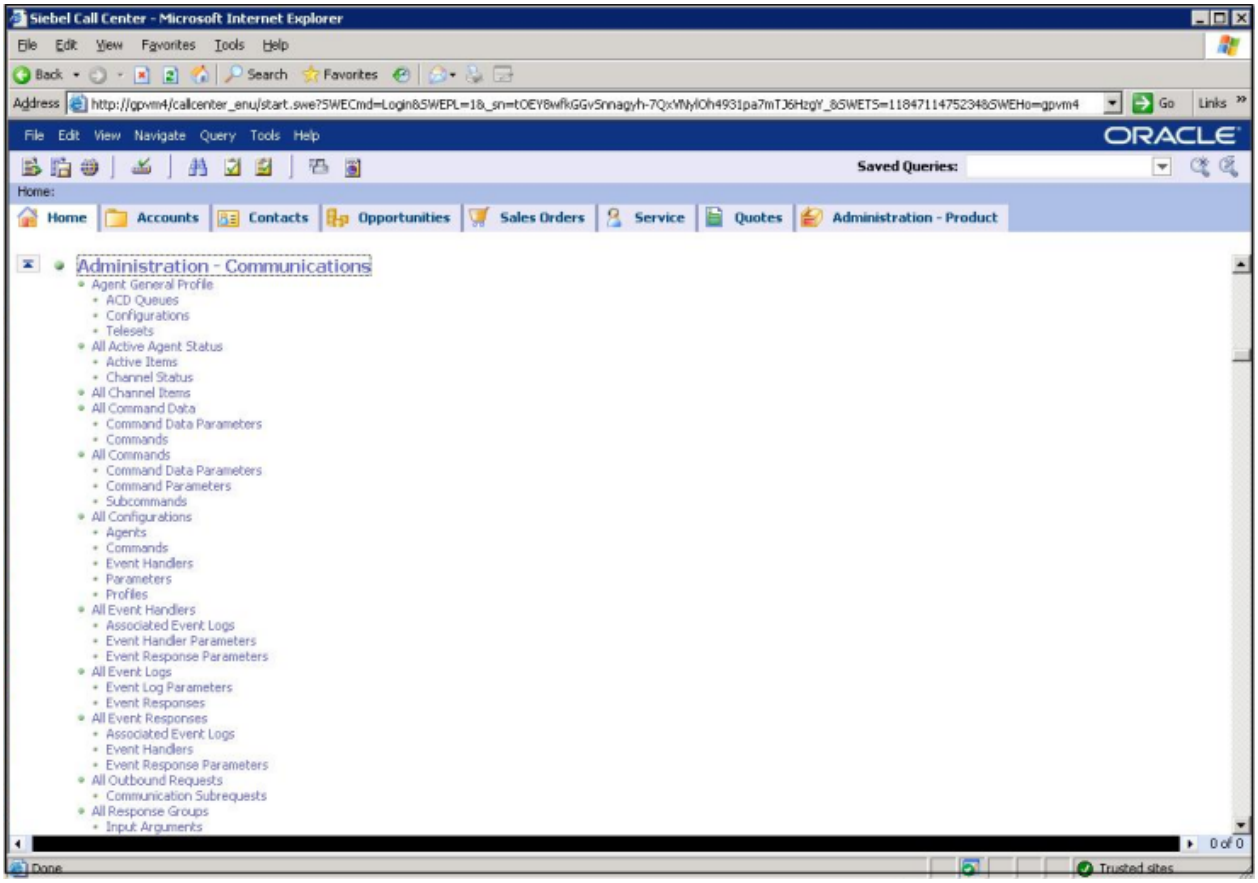

Figure 68: Home Tab of the Administration-Communications Screen

End of procedure

Next Steps

- Create a Genesys configuration. See the section, "Creating a Genesys Configuration" on page 131.

Creating a Genesys Configuration

This section describes how to create a Genesys configuration by using the links on the `Administration - Communications` screen.

Procedure:
Creating a Genesys configuration

Purpose: To create a Genesys configuration and adding a profile to the G*plus* Voice Component.

Start of procedure

1. Navigate to the `Administration - Communications` screen. See, Procedure: Accessing the Administration-Communications Functions, on page 130.
2. On the `Home` tab, select `All Configurations` from the links listed (see, Figure 68 on page 131).

   The `Configurations` window opens, displaying a list of configurations.
3. Select `Genesys Configuration` from the list (see Figure 69). `Voice collaboration` displays in the `Comments` column.

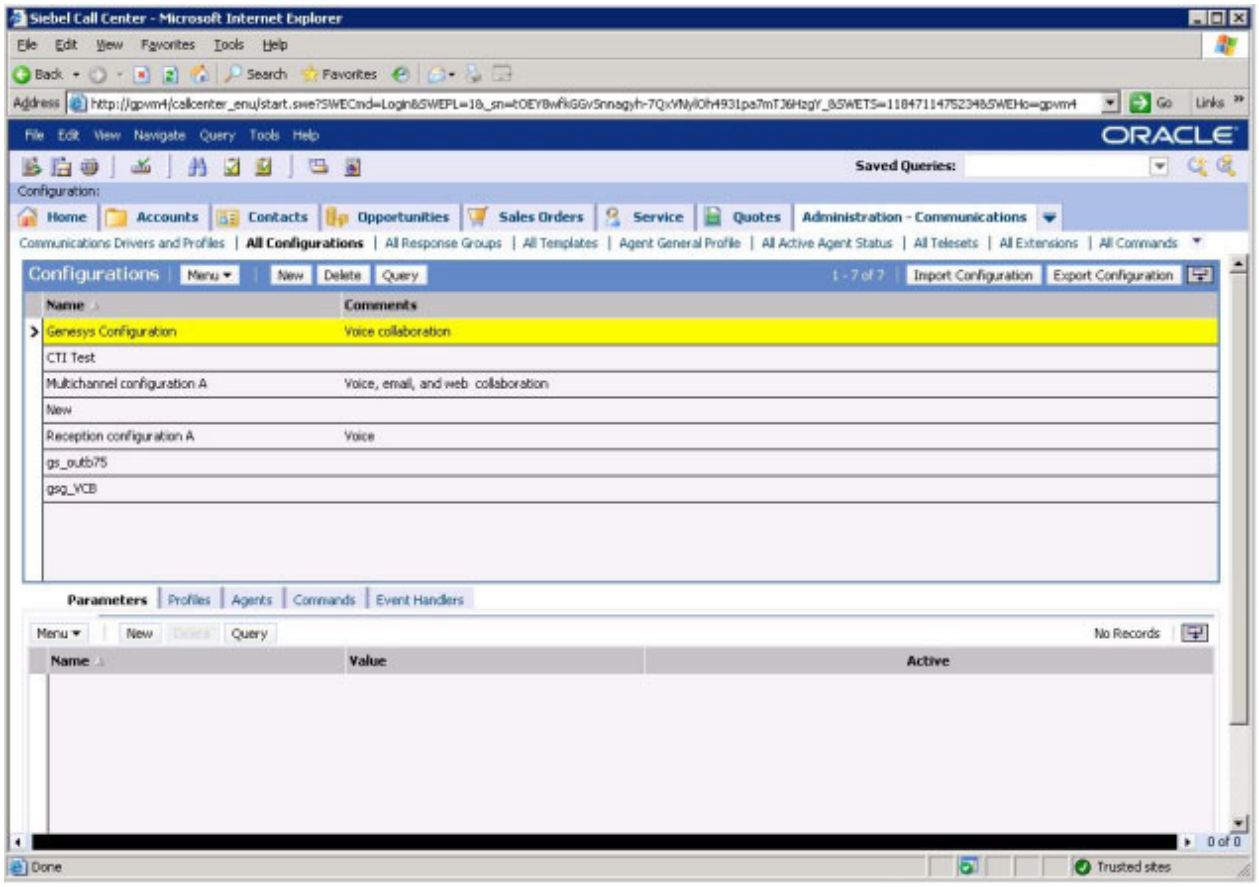

Figure 69: Home Tab of the Administration-Communications Screen, All Configurations

Applying a Profile to the G*plus* Voice Component

4. Click the `Profiles` tab in the lower frame (see Figure 69 on page 132). The `Profiles` applet displays.
5. Click `New` on the `Profiles` applet.
6. Select `Add Communication Profile`. The `Add Communication Profile` pop-up window displays.
7. Select `Genesys Universal Profile_8000008` (see Figure 70).
8. Click `OK`. The `Genesys Universal Profile_8000008` profile appears under the `Profiles` tab of the `Configurations` window (see Figure 71 on page 134).

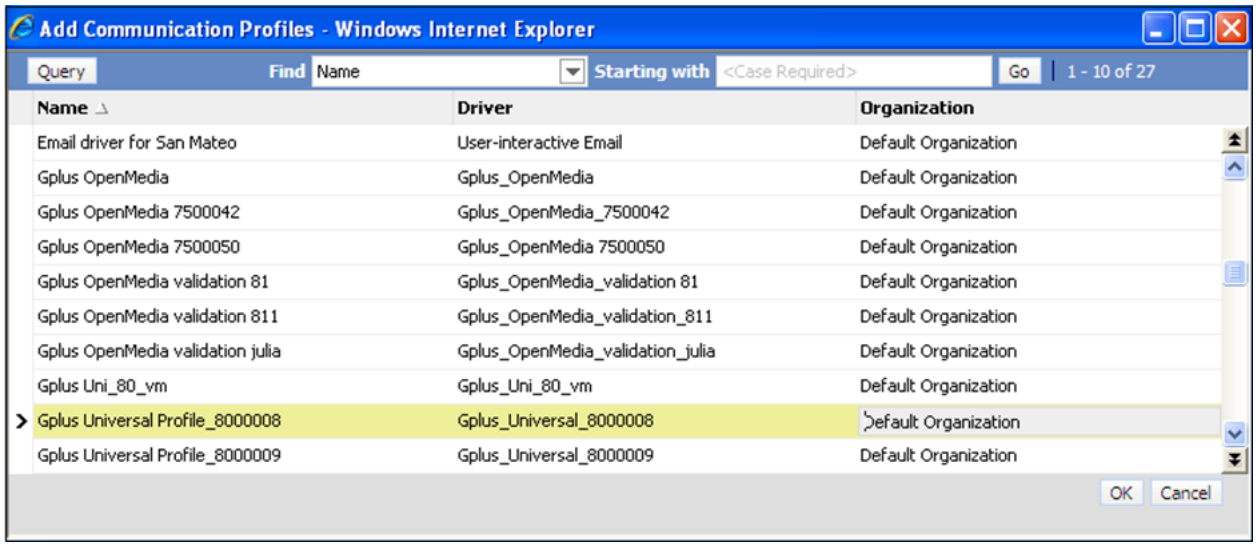

Figure 70: Add Communication Profiles Pop-Up Window, Genesys Profile Selected

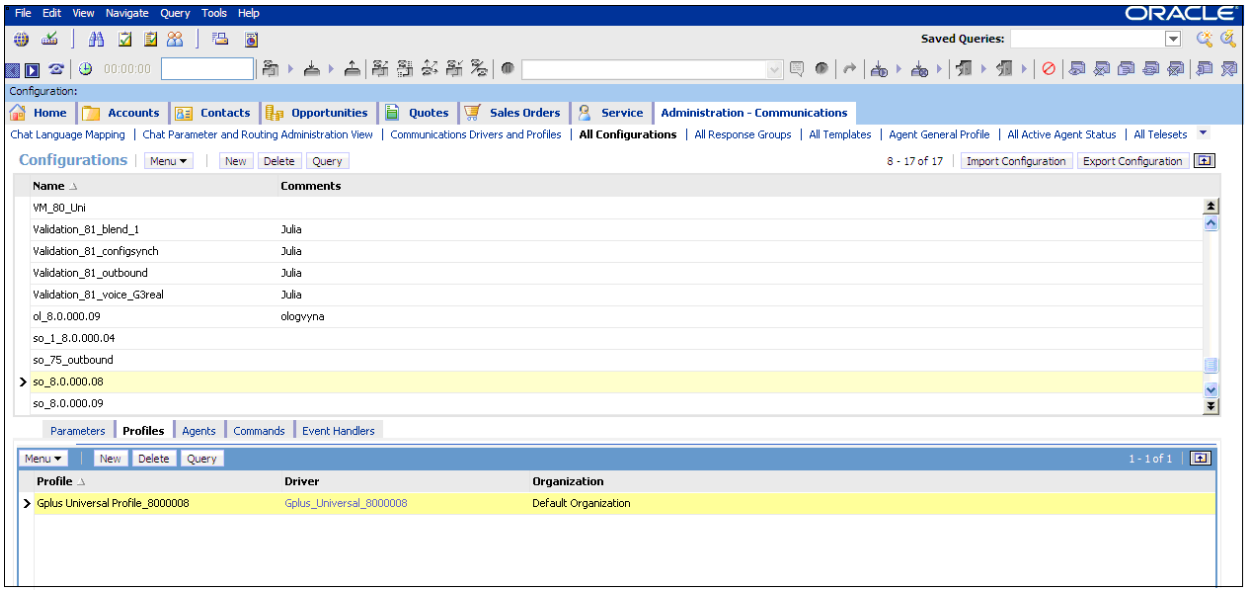

Figure 71: The Newly Created Genesys Profile and G*plus* Universal Driver

End of procedure

Next Steps

- Add agents to the newly created Genesys profile. See the section, "Adding Agents to the Genesys Profile" on page 134.

Adding Agents to the Genesys Profile

This section describes how to associate agents to the newly created Genesys profile.

Procedure: Adding agents to the Genesys profile

Purpose: To add agents to the Genesys profile.

Start of procedure

1. On the `Configurations` window, click the `Agents` tab in the lower frame (see Figure 72).

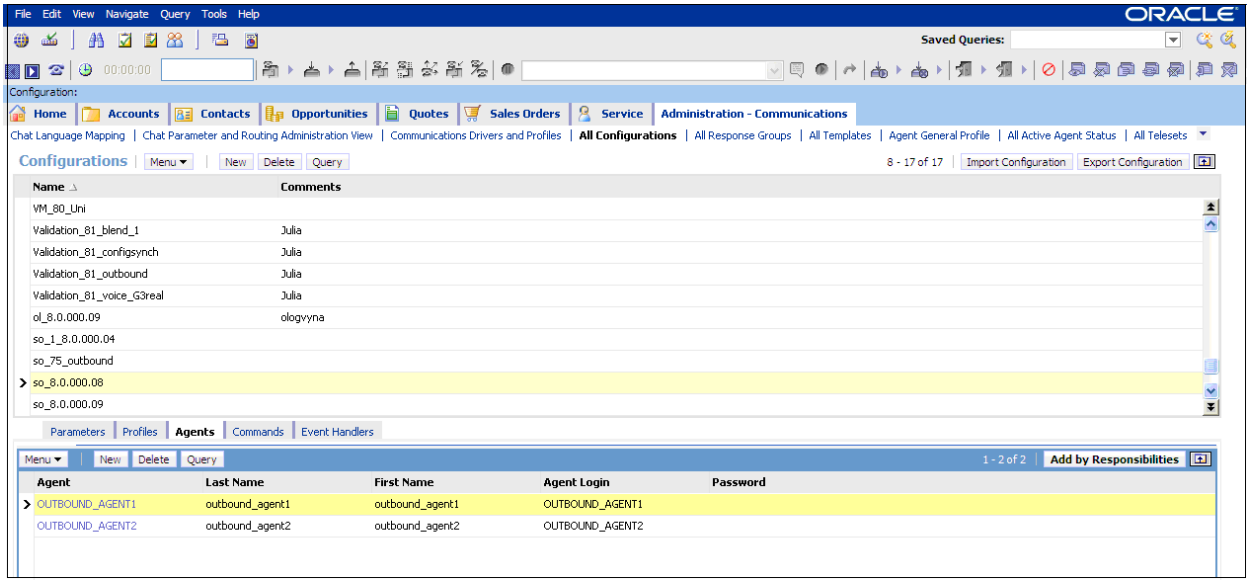

Figure 72: The Agents Tab

2. To display the available agents (from either the Genesys or Siebel database):
   a. Click the down arrow and select `Add Agents`.
   The `Add Agents` pop-up window displays and lists all available agents that can be selected
   b. Select the agents to add to the Genesys profile (see Figure 73).

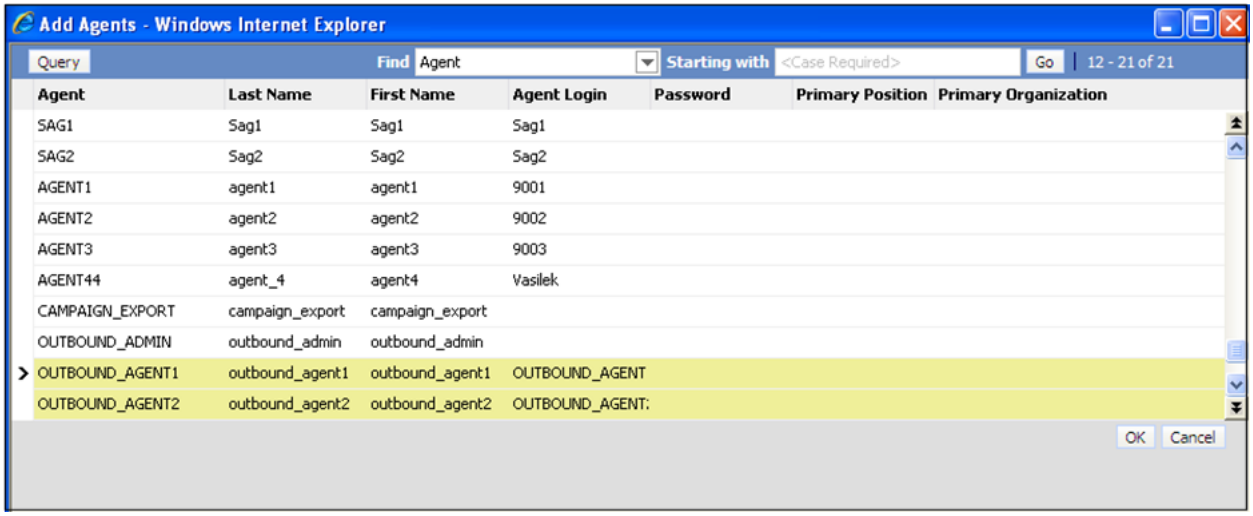

Figure 73: The Add Agents Pop-Up Window

3. Click OK.
   The selected agents appear in the Agents tab in the lower portion of the page (see Figure 74).

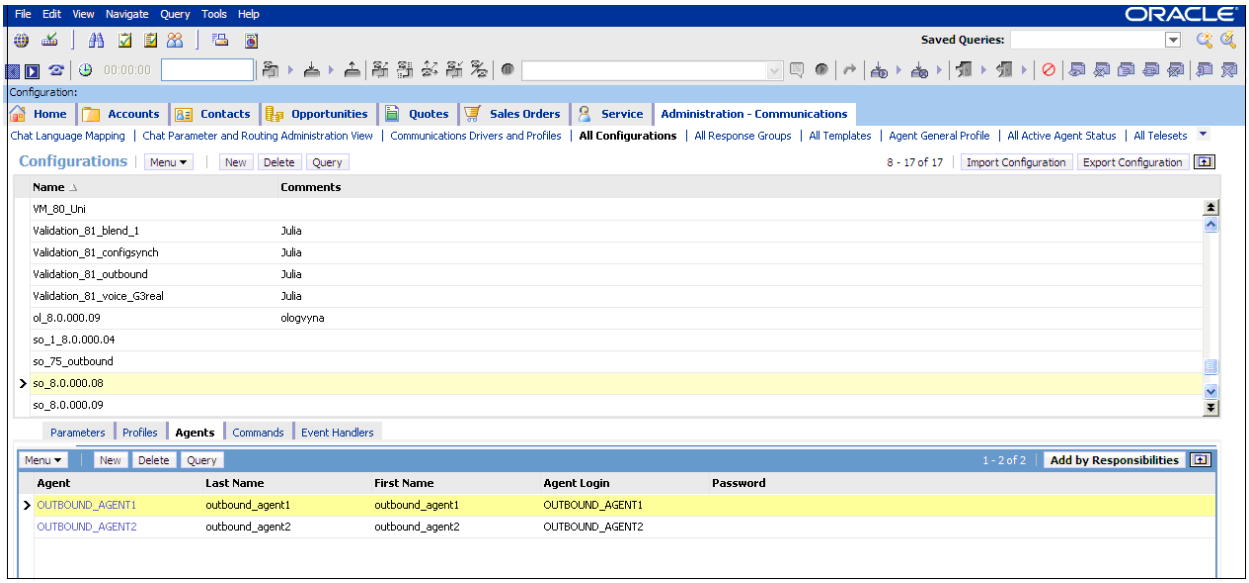

Figure 74: The Agents Added to The Genesys Configuration

4. Edit the agent information, if necessary.

End of procedure

Next Steps

- Edit the agent information, if necessary. See the section, "Editing the Agent Information".

Editing the Agent Information

This section describes how to edit the agent information that was added to the Genesys profile and contains the following sub-sections:

Assigning a Login ID to an Agent

If an agent does not have a login ID, you must assign one to them.

Procedure:
Assigning a Login ID to an agent

Purpose: To assign a login ID to an agent.

Start of procedure

1. Navigate to the `Administration - Communications` screen. See, Procedure: Accessing the Administration-Communications Functions, on page 130.
2. On the `Home` tab, select `Agent General Profile` from the links listed.

   The `Agent General Profile` window displays (see Figure 74).

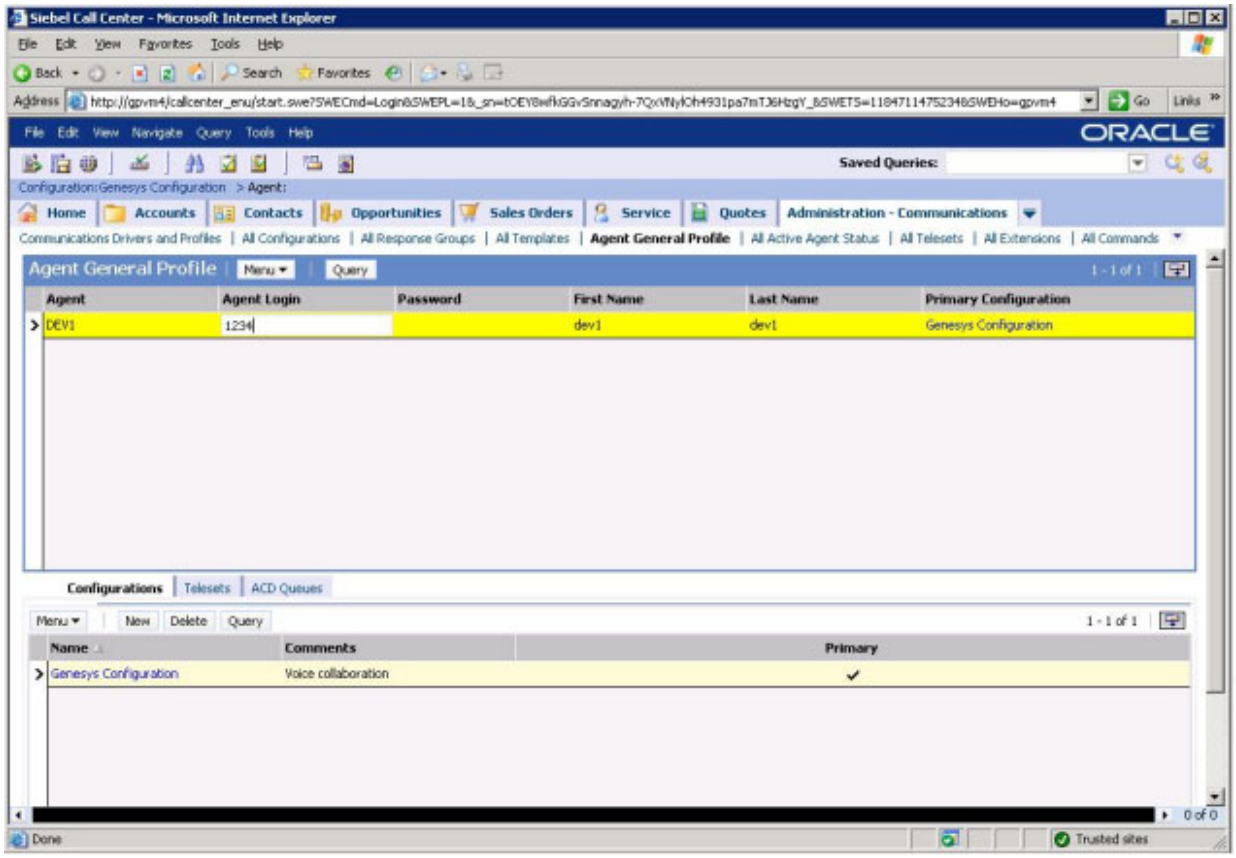

Figure 75: The Agent General Profile Window

3. Edit the agent login information, as follows:

Assign the Selected Agent to a Siebel Teleset

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

b. Click the `Telesets` tab (see Figure 75).
The `Telesets` tab displays (see Figure 76 on page 138).

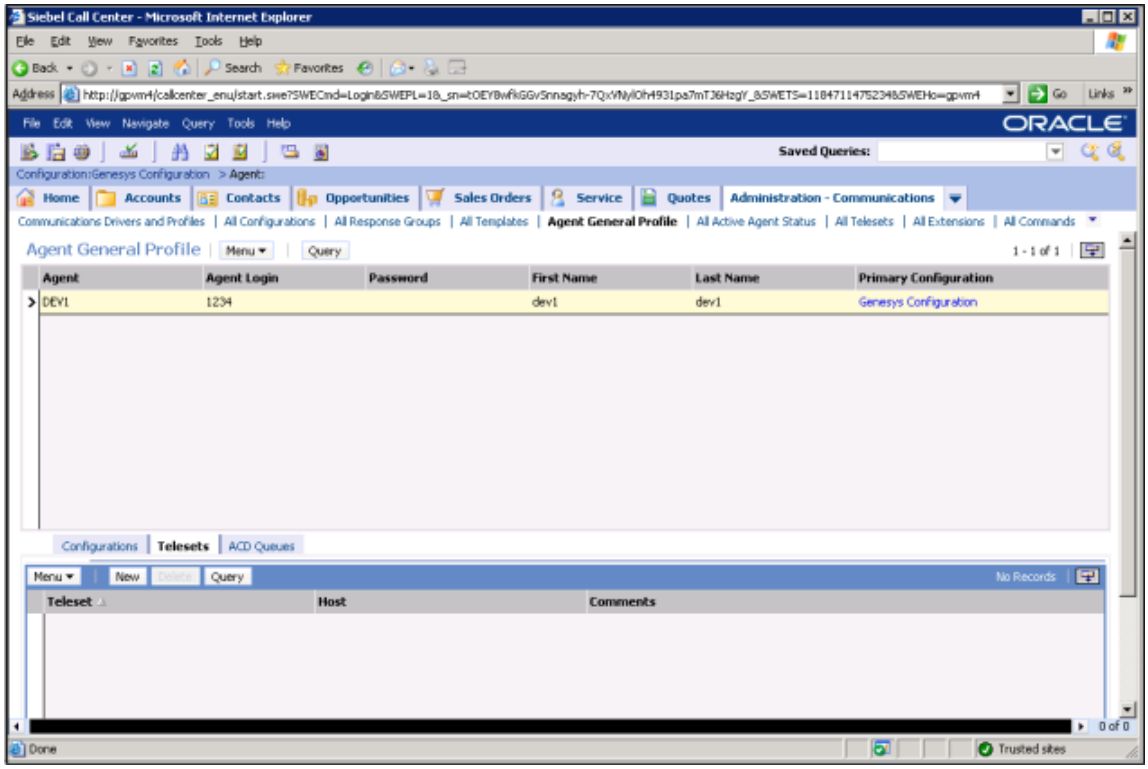

Figure 76: Agent General Profile, Telesets Tab

c. Click the `Query` button in the `Telesets` tab.
The dialog box is displayed.

d. Click the down arrow and select `Telesets`.
The `Add Telesets` pop-up window displays the Telesets that are available for assigning to the agent (see Figure 77 on page 139).

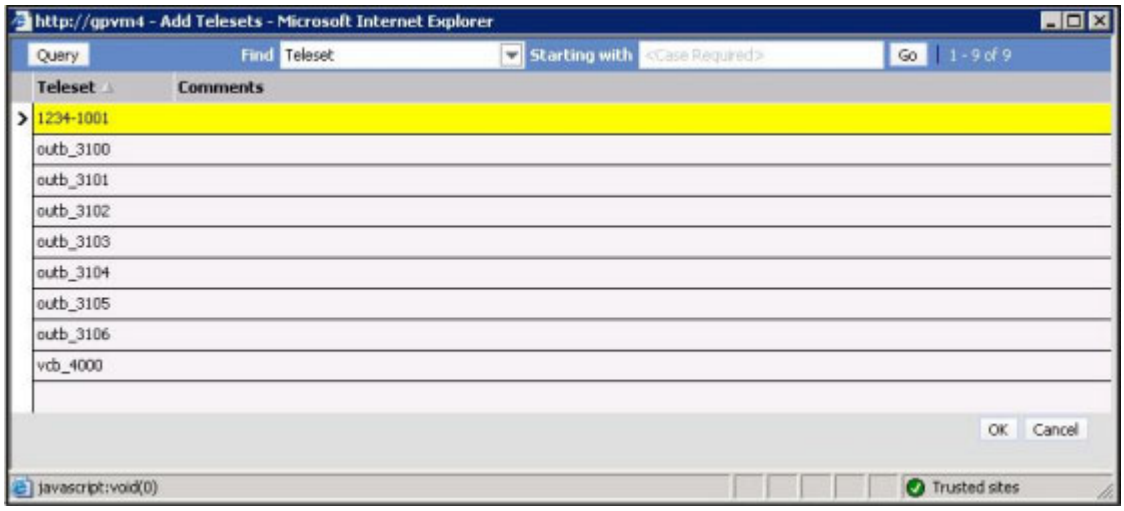

Figure 77: Add Telesets, Query Results

4. Click `OK`.
   Figure 78 displays the Teleset that is assigned to the agent.

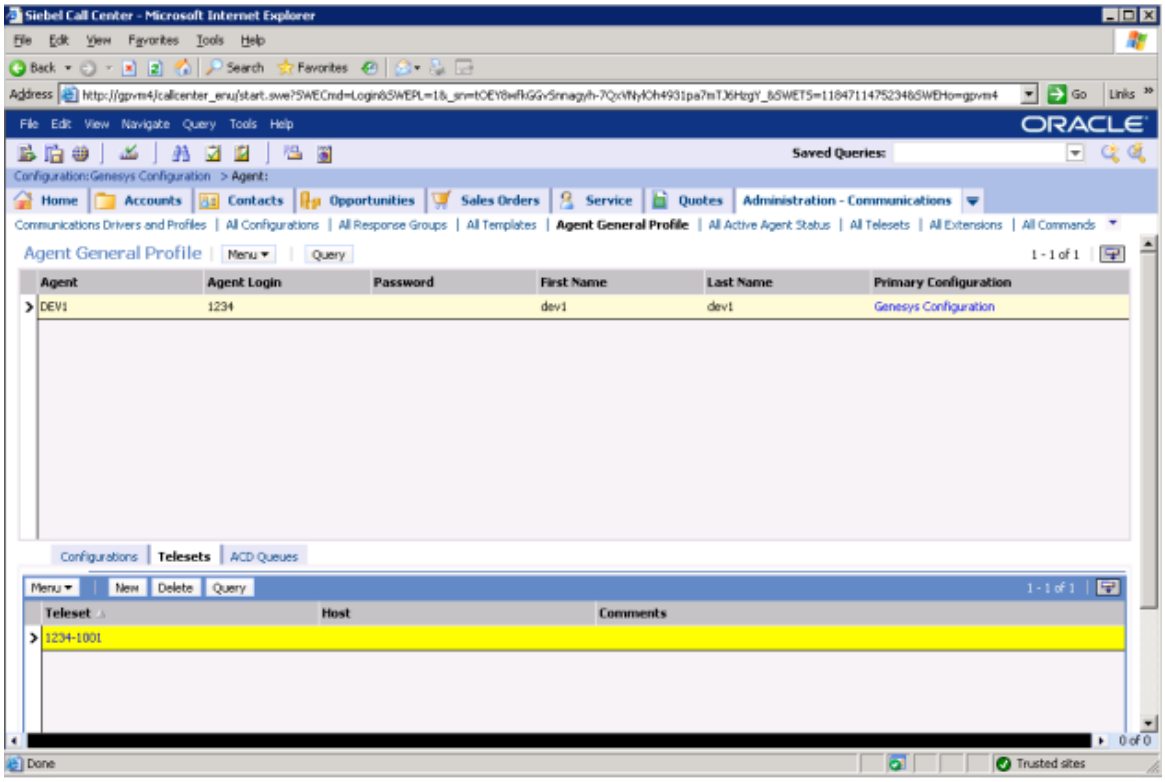

Figure 78: Teleset Assigned to Agent

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.

End of procedure

Next Steps

- Configure the `Not Ready` command. See the section, "Configuring the Not Ready Device Command".

Configuring the Not Ready Device Command

The `Not Ready` device command can be displayed as a button on the Siebel Communications Toolbar for the following Adapter Components: Voice, Siebel E-mail, and Multimedia. This button is displayed based on the configuration of the `*.def` file for the following two definitions:

- the switch type,
- T-Server host name and 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 is defined by the `GenComm_universal.def` file. The use of the existing component in the Siebel CRM List of Values (LOV) is used to define the set of allowed work modes and reason codes to be sent with the `Not Ready` device command.

When an agent changes to the `Not Ready` state, the `Transfer Multiple LOV` Siebel CRM popup applet displays a popup window with a set of possible values for the `AgentWorkMode` and the `ReasonCode` parameters. An agent selects the appropriate values from the list of options and then selects `OK`.

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

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

If any value for the `ReasonCode` parameter is not chosen when the popup window displays, then the default value (`-1`) is used for the `ReasonCode`. If any value for the `ReasonCode` parameter is not chosen in the popup view, then the Adapter looks for the value defined by the `Service:AgentWorkMode` parameter.

If the value of this parameter is defined, then the Adapter uses it; otherwise the default value (`0`, `AgentWorkModeUnknown`) is used as the `AgentWorkMode` value. See the *G*plus *Adapter for Siebel CRM Deployment Guide* for more information about this feature.

Synchronizing the Siebel Extensions and ACD Queues with the Configuration Environment

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 Campaign 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.

The 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 associates DNs in Telesets to a particular switch in Genesys Configuration Manager through the communications driver profile—for example: `extension 7001@Switch1` in the Teleset means that `Extension 7001` is associated with a switch referenced by the `Driver:TServerAppName` parameter in the profile, where `DriverAlias = "@Switch1"`.

The Siebel extensions, ACD Queues, and Agent Logins are synchronized in the Genesys Configuration Manager environment under the switch that is described by its corresponding Siebel Communications Server Driver parameter for Genesys Voice (`Channel Type = Voice`)—for example:

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

Note: Customers who used previous versions of the Adapter and do not require the 7.5 and higher functionality of the Genesys Voice Component, may still use the `ServerHost` and `ServerPort` parameters as described below.
Do *not* change the `Driver:TServerAppName = "CHANGE_ME"` parameter in this case. If the `Driver:TServerAppName` parameter is defined, then the `Driver:ServerHost` and `Driver: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 the values of these driver parameters are unique in your configuration environment. Do not use more then one T-Server application with the same host/port combination.

Note: The Siebel Extensions and ACD Queues that 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 the Adapter profiles)
- An agent's Teleset can be associated with:
  - Multiple extensions

You must configure the `DriverAlias` option to associate the 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 values that are used in any communication interactions.
- `driver_alias = @<any_string>`

The Siebel extensions and ACD Queues are 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` parameter is exported into and synchronized with Configuration Manager under the switch that is described by its corresponding:

- `Driver:TServerAppName`
- `DriverAlias` option of the Adapter profile that has the same value as the `driver_alias` substring from the full extension and ACD Queue name (`full_extension_name`).

Figure 79 illustrates an example of a Siebel export/synchronization with the Genesys configuration environment.

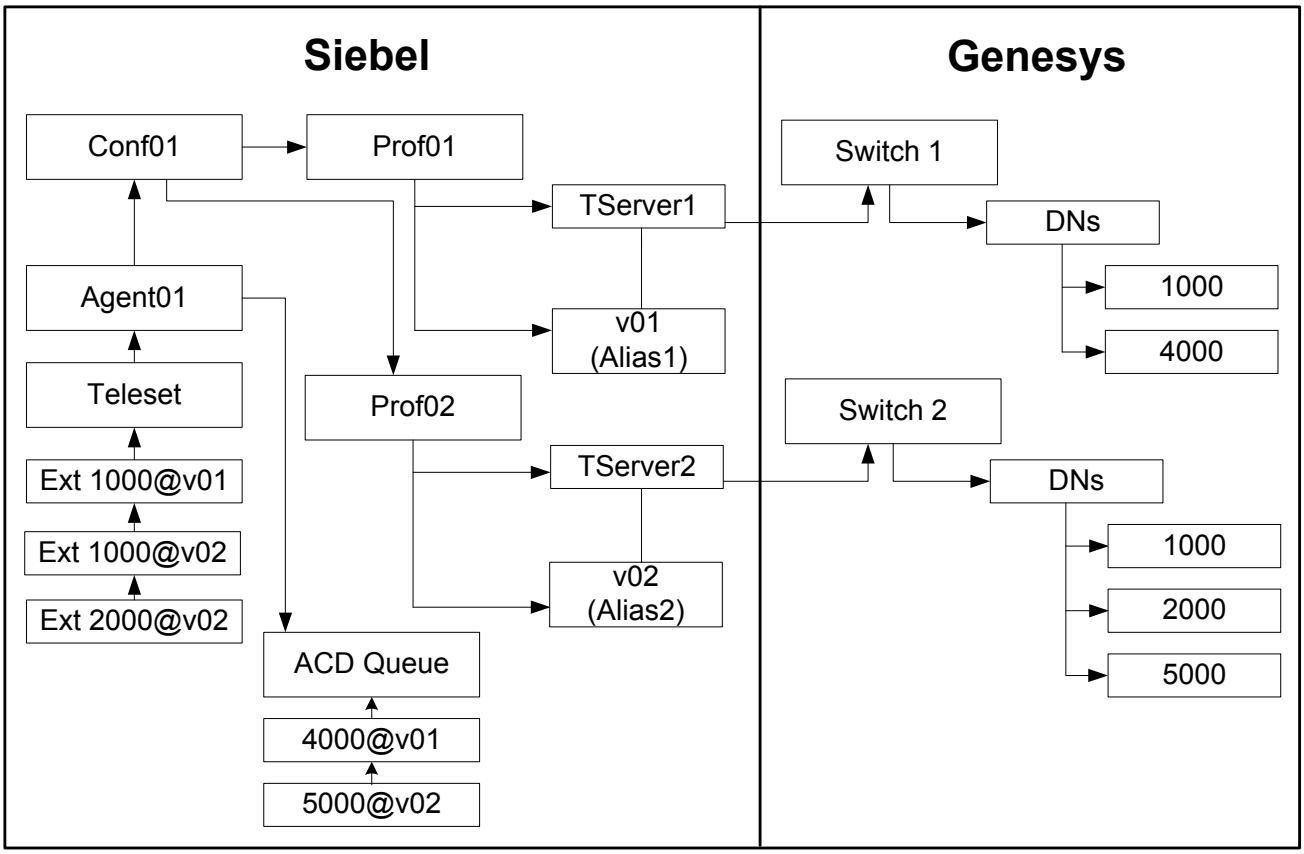

Figure 79: Example of Siebel Export/Synchronization with the Genesys Configuration Environment

Example 1: Siebel Synchronization with Genesys

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"`

If the agent named `Agent01` has a Teleset named `Place01` that contains the following three extensions:

- `1000@v01`
- `2000@v02`
- `3000`

and the agent also has the following three ACD Queues:

- `4000@v01`
- `5000@v02`
- `6000.`

Then, only the following `actual_extension_names` name of the extensions and ACD Queues that are described above are exported into and synchronized with Configuration Manager as follows:

- under `Switch01: 1000, 4000`
- under `Switch02: 2000, 5000`

Note: Extension `3000` and ACD Queue `6000` are not exported, because `Conf01` does not have an Adapter profile with an empty value of the `DriverAlias` option.

For example: Extension `3000` should be formatted as:

- `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 where the Teleset has no `'A'` extension (Siebel), it is exported as an `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`, disables this conversion. Change the value of `ConvertExt2ACD` to `false`, if your environment does not have such switches. See “Setting the Default Field Values for the Designated Genesys Objects” on page 149 for more information.

Synchronizing a Siebel Employee/Agent in a 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:

Procedure: Reassigning an agent to a different Siebel organization

Purpose: To reassign an agent to a different Siebel organization.

Start of procedure

1. Delete the agent from all communications configurations, which are based on the Voice Component.
2. Navigate 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 using the options of the Configuration Synchronization Component application in the Genesys Configuration Layer.
3. Assign the agent back to the communications configuration that is described in Step 1.

End of procedure

Next Steps

- There are no further steps.

Siebel Agents' Skill and Skill Items Naming Requirements

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 the configuration data in Siebel and Genesys applications.

Siebel Skill Mapping

When you create an agent skill, follow the standards displayed in Table 14 to establish your skill mapping. For additional information, see the Siebel documentation.

Table 14: 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_

Table 14: Siebel Skill Mapping (Continued)

Siebel Skill Elements	Genesys Mapping Substrings
High Char 6	_HC6_
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_

Table 14: Siebel Skill Mapping (Continued)

Siebel Skill Elements	Genesys Mapping Substrings
Low Number 4	_LN4_
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:

1. Skill
2. Skill Item
3. Skill Item Expertise

When a Siebel Employee is exported and synchronized into Configuration Manager, the information about the agent's skills is also exported into Siebel. Table 15 below shows how the information is transferred from the Siebel environment into the Genesys Configuration Environment.

Note:
- 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 in Table 15 below:

Table 15: Corresponding Siebel Skill Item and Genesys Skill Level

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

Configuration Synchronization Enhancement

Setting the Default Field Values for the Designated Genesys Objects

The Configuration Synchronization Component allows customers to define and modify the fields that are synchronized (exported) from Siebel to Genesys. Configuration Synchronization exposes all Configuration Manager 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 are synchronized.

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

Example 2 below describes how to set up the default values to be assigned to the specified fields of the Genesys objects during the synchronization process. For the following example, assume that it is necessary to assign the following default values to the selected fields of the `Agent Login` and Genesys `DN` objects during export from Siebel to Genesys:

Example 2

```
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 for Siebel CRM Deployment Guide*, it is possible to set up the default values provided above.

Procedure: Setting the default values for the Business Service User Properties

Purpose: To set the default values for the Business Service User Properties.

Start of procedure

1. In Siebel Tools, navigate to `Object Explorer>types`. Then go to the `Siebel Objects\Business Service` folder.
2. Select the `Genesys Config Synchronization` record on the `Business Services` applet.
3. With the `Genesys Config Synchronization` record on the `Business Service` applet selected, navigate to the `Business Service User Prop` folder. To make this folder visible in `Object Explorer`, select it on the `Object Explorer` tab of the Development Tools Options window (`View>Options`). The `Business Service User Props` applet is displayed.

Note: The `Business Service User Props` applet displays a number of properties with the names resembling the names of the corresponding Genesys fields.

4. 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.
```

5. 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.

End of procedure

Next Steps

- There are no further steps.

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 the 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 which 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 the Siebel Tools application.

After importing the GenesysConfigSynchronization.sif file (as described in the *G*plus *Adapter for Siebel CRM Deployment Guide,* it is possible to change the default mapping of the Genesys Employee ID, as follows:

Procedure: Changing the default mapping of the Genesys Employee ID

Purpose: To change the default mapping of the Genesys Employee ID.

Start of procedure

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. Navigate to the Integration Component folder. To make the Integration Component folder visible in Object Explorer, select it on the Object Explorer tab of the Development Tools Options window (View > Options).
4. Select the Genesys Users/Organizations record on the Integration Components applet.
5. Navigate to the Integration Component Field folder. The Integration Component Fields applet is displayed.

6. Click on the `Integration Component Field` folder to display the `Integration Component Fields` applet.
7. On the `Integration Component Fields` applet, select the record where the name equals the employer's ID (`Name = EmployeeId`).

Note: The default for this record is `External Name = AgentLoginId`. This record maps the Genesys agent's `Employee ID` to the Siebel Agent Login.

8. Set the `External Name = SiebelEmplRowId` value. This value maps the Genesys agent's `Employee ID` to the Siebel employee's `Row ID`,

   or

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

   or

   Set the `External Name = <custom field>` value. This value 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 the Siebel server, or if you have not yet finished the deployment, continue with the deployment of the Configuration Synchronization Component.

End of procedure

Next Steps

- There are no further steps.

E-Mail Routing

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

1. Genesys Universal Router queues the inbound Siebel eMails:
   - E-mails are received from the corporate e-mail server and are processed through the Siebel eMail Response - Process Message workflows.
   - E-mails are sent to Siebel Smart Answer for context analysis and auto-response, if appropriate; otherwise, the e-mails are sent 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 the Genesys Universal Queue.

2. Genesys Universal Routing Server (URS) pushes the e-mails to Siebel agents through 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 through the G*plus* Adapter.
   - The agent sees the e-mail message in the Incoming Message window.
3. Siebel eMail Response processes the e-mail:
   - Siebel event handlers use the sent activity ID to lookup and display the appropriate Siebel eMail view for processing the agent's reply.
   - 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 Genesys.

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

The Adapter assumes that Genesys inbound e-mails are unchangeable, therefore, inbound e-mails are instantly imported. However, outbound e-mails can be changed externally when they are not handled by the Adapter. Consequently, after the outbound e-mails are delivered to the Siebel agent, the Adapter imports or updates the contents of the e-mail into Siebel.

Though, due to the system limitation on the size of the `Email Body` field of the `Action` record in Siebel, other applications (if any are involved) should limit the size of the outbound e-mail body to below 16,008 bytes.

Note: It is still possible to receive inbound e-mails with a body size greater than this limit. For example, the Adapter preserves the unmodified body as an attachment and then automatically truncates the body to fit within the 16,008 byte size 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 to the Siebel desktop for the first time. The activity status is changed to reflect the current agent state.

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

Outbound e-mail can be changed externally, if they are not in the process of being handled by Siebel agents. However, the content is imported each time an interaction is delivered to an agent. The following diagram in Figure 80 shows changes in the activity status for e-mail:

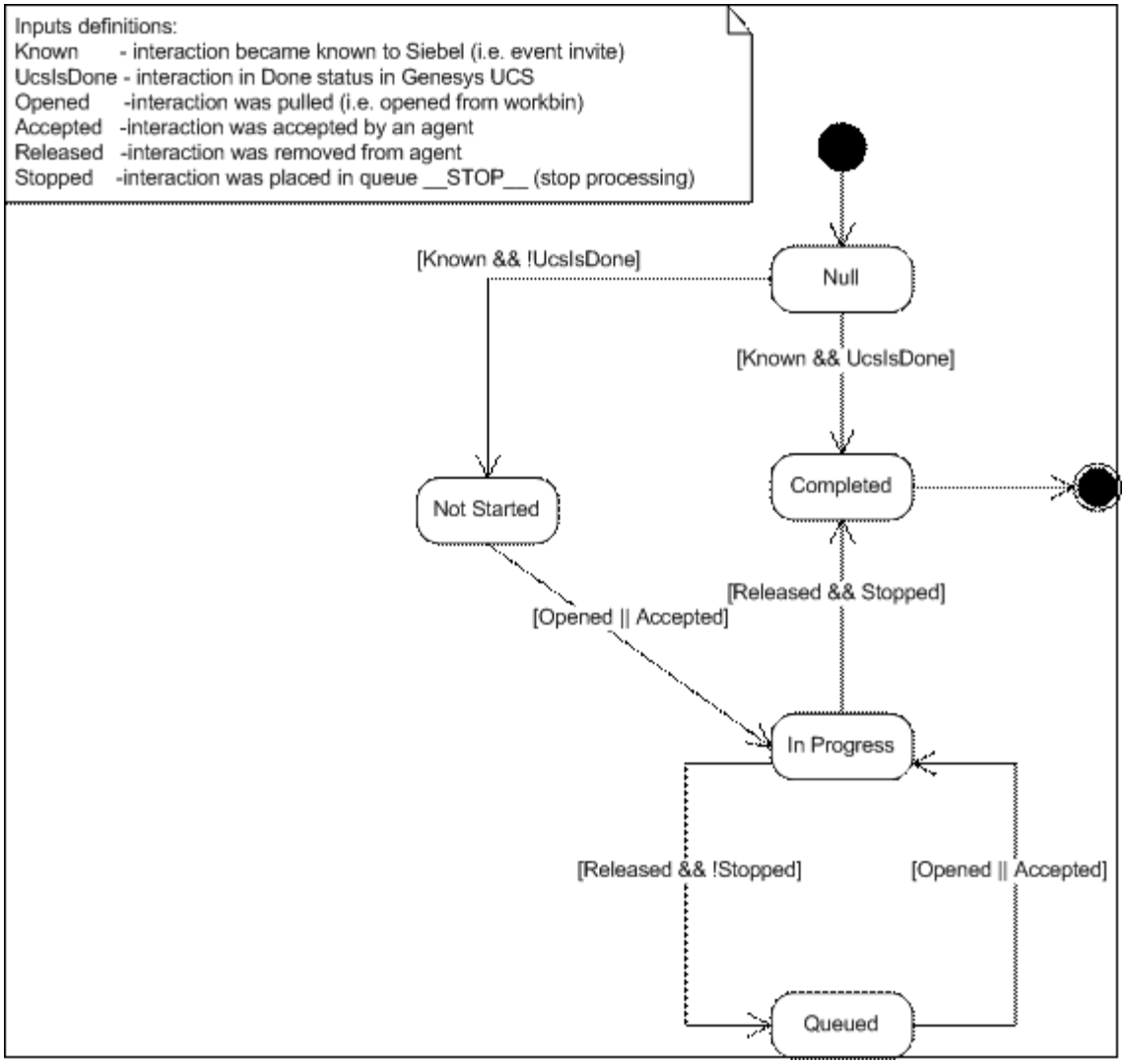

Figure 80: Genesys E-mail Activity Status Diagram

Genesys Chat Activity Creation

A `Chat` activity is created when the status of an `OpenMediaInvited` event changes to `Requested`. After accepting the chat request (upon receiving the first `ChatNewParty` event, which indicates that a chat session is online), the status is changed to `In Progress`. The completion of the chat changes the status to `Completed`. The entire chat transcript is stored in a custom table named

CX_GEN_ACT_CHAT. The following diagram in Figure 81 shows changes in the activity status for chat:

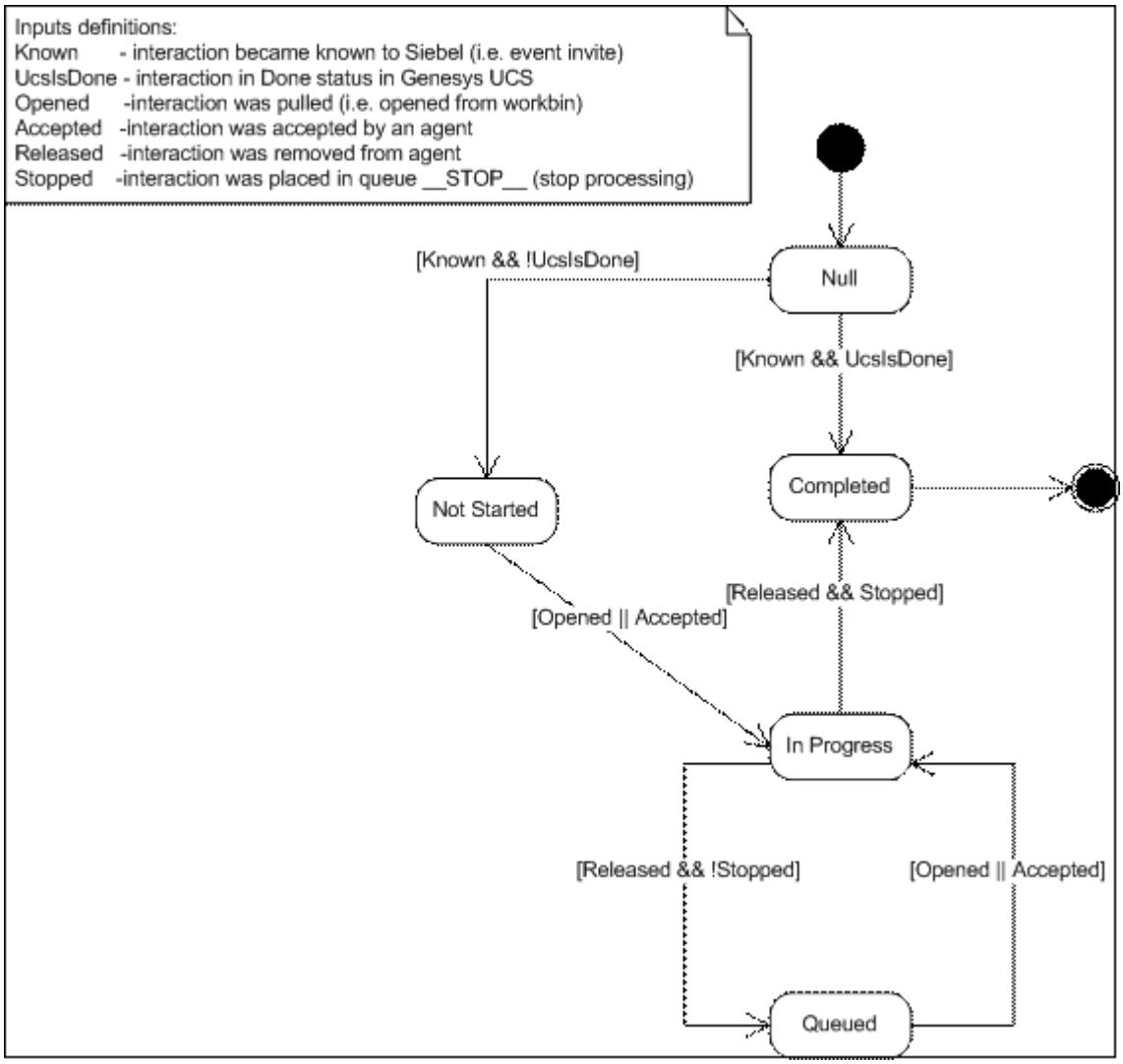

Figure 81: Genesys Chat Activity Status Diagram

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. Sending a chat transcript can be accomplished and configured in the following 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 clicking Mark Done, select the Send Transcript check box, and the Adapter sets the interaction attribute Send_Chat_Transcript to Y.

  - Create a routing strategy that checks the value of this attribute, and if it equals `Y`, it 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 unconditionally 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 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 the 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 is deployed, it must always be running to ensure that the Genesys environment stays up-to-date with the Siebel environment. Running the Component constantly prevents any error messages in the Siebel Web Client and guarantees 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 the Siebel and Genesys agent data when the Configuration Synchronization Component is started for the first time. Use the `-clean_batch` option to remove *all* agent data from the Configuration Synchronization Component folders in Configuration Manager and then export the agent data from Siebel.

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 of the `-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.

In order for the `-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 of the `-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.

You can use the Genesys Management Layer, and specifically the Solution Control Interface, to start or stop or switch between the 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.

For the Configuration Synchronization component to work correctly, the following two 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. Agents and their Communication Configuration profiles must belong to the same Siebel organization.

A Teleset must not be assigned to agents from different Siebel organizations. The same extension must not be used in more than one Teleset.

Siebel Extensions, ACD Queue, and Agent Login Synchronization

The Siebel extensions, ACD Queues, and Agent Logins are synchronized in the Genesys Configuration Management Environment 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 7.5 or higher functionality of the Genesys Voice Component, may still use the `ServerHost` and `ServerPort` parameters described below.
Do *not* change the `TServerAppName = "CHANGE_ME"` parameter in this case. If the `TServerAppName` parameter is defined, then the `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 the values of these driver parameters are unique in your Genesys Configuration Manager. Do not use more then one T-Server application with the 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

Note: This section applies to Campaign Synchronization Component versions prior to 8.0.100.

This section describes how to start the Campaign Synchronization Component and contains the following sub-sections:

- Exporting the Siebel Campaigns to Genesys, page 159
- Deleting the Siebel Campaigns from Genesys, page 165

- Synchronizing the Time Zones, page 165
- Managing the Calling Lists, page 166

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 the call results of the campaigns that have already been executed, but have not yet been synchronized.

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 starts 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 the Siebel Campaigns to Genesys

You must 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 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 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 of its lists should include the original Siebel Administrator position.
- The `Team` field of the campaign and all of its lists should include as a primary record the primary position(s) of the users who may update information related to the campaign synchronization process.
- If you use the `Compatibility` mode, make sure that all of these conditions are valid for each campaign in a campaign's parent-child hierarchy. Information about the `Compatibility` mode is provided below, in the section titled "Compatibility Mode" on page 174.
- 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 (as a primary record) the primary positions of users who update the `Do Not Call` properties of these contact/prospects in the `Contact Team` field (the access list), otherwise, the `Do Not Call` properties may not be synchronized. These contact/prospects must also 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 Outbound Contact Server's `Do Not Call` table.

- All segments/lists of exported campaigns must have a status equal to `Active` or `In Progress`.
- The Siebel user login used for `<username>` in the Adapter's `Application` option should have the same primary position (the record in the `Team` field) as one of the Siebel users who creates the Siebel campaigns.
- All user logins related to Campaign Synchronization should have the same record (position) set as primary in the `Position` field (`Employees` view) and the `Contact Team` field (`Users` view).
- To export the campaign, the campaign execution options must be set as follows:
  - 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 same position as the primary position of the Siebel user who is performing the export.

For more information, see the *G*plus *Adapter 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 overwrites 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 is overwritten by the data for the second exported campaign, and the first campaign in the Siebel environment is 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. See, Procedure: Assigning the Genesys Campaign Export position to the campaign.
- Add agent or place groups to the `Genesys Campaign` object to complete the configuration. See, Procedure: Adding an agent or place group to the Genesys Campaign object, on page 162.

Procedure: Assigning the Genesys Campaign Export position to the campaign

Purpose: To assign the Genesys Campaign Export position to the campaign.

Start of procedure

1. From the Site Map, select `Campaign Management > Campaign List` (7.7/7.8/8.0/8.1).
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.

   The campaign is now imported to Genesys.

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 automatically assigns the position to the parent campaign (and all its children) and exports this parent-child campaign structure to Genesys for processing.

End of procedure

Next Steps

- Add an agent or place group to the Genesys `Campaign` object. See, Procedure: Adding an agent or place group to the Genesys Campaign object.

The `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 procedure to complete the configuration:

Procedure: Adding an agent or place group to the Genesys Campaign object

Purpose: To add an agent or place group to the Genesys `Campaign` object.

Start of procedure

1. Create the agent or place group in Genesys Configuration Manager.
2. Configure the agent or place group, making sure to add the previously exported agent or place to the group in Genesys Configuration Manager.
3. Include the newly created group in the `Campaign` object and complete the campaign configuration as required.

End of procedure

Next Steps

- There are no further steps.

See the *Outbound Contact Deployment Guide* for details about this configuration process.

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

Table 16 describes the objects created by the component during the campaign synchronization process.

Table 16: 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` sub-folder 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 16: 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 propagates the changes made to the campaign definition in the Siebel environment to the Genesys environment.

Deleting the Siebel Campaigns from Genesys

Procedure: Deleting a Siebel Campaign from the Genesys environment

Purpose: To delete a Siebel campaign from the Genesys environment.

Start of procedure

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 delete 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.

End of procedure

Next Steps

- There are no further steps.

Synchronizing the Time Zones

You have to synchronize the names of the time zones in the Genesys and Siebel environments. This means that you must make the time zone names used in your Genesys environment match those used in your Siebel environment. When you are finished, all of the time zones used in reference to the contacts or prospects in your Siebel environment must also

exist in the Genesys environment. For more information, see the *G*plus *Adapter for Siebel CRM Deployment Guide*.

Note: If the time zones were imported to the Genesys environment while the Campaign Synchronization Component was running (after the deployment), the Campaign Synchronization Component must be restarted to accept these changes.

Managing the Calling Lists

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

Using the desktop interface, the supervisor and agents enter the campaign definition data. The data is automatically imported into the Genesys configuration database and is then accessible in the following location in the Genesys Configuration Management environment (assuming that the proper associations have been made):

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

The Siebel contacts/prospects in the defined callings lists are also automatically made available to Outbound Contact Server for loading and running in their associated campaigns.

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

Note: Genesys Outbound Contact does not support the dialing of phone numbers with extensions. Therefore, these 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

Note: This section applies to Campaign Synchronization Component versions prior to 8.0.100.

This section describes the two data mapping modes (`Regular` or `Compatibility`) and is divided into the following sub-sections:

- Differences Between the Modes, page 167

- Regular Mode, page 170
- Compatibility Mode, page 174
- Mapping Calling Lists, page 185

The G*plus* Adapter supports the ability to import campaigns and campaign contact records from a Siebel CRM Contact Center. This import process is made possible through the use of one of two data mapping modes, `Regular` mode and `Compatibility` mode. These modes are selected during the Genesys G*plus* Adapter deployment 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 the Siebel campaigns to the Genesys campaigns and how it translates the hierarchy of the Siebel contact records to the Genesys calling lists. This section provides the 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. 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 the campaign synchronization, `Regular` mode, is probably suited for your purposes. `Regular` mode does not recognize or reproduce the parent-child relationships among campaigns.

Figure 82 on page 168 shows how Siebel campaigns with parent-child relationships are mapped into Genesys campaigns in `Regular` mode. Figure 83

on page 169 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. 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.

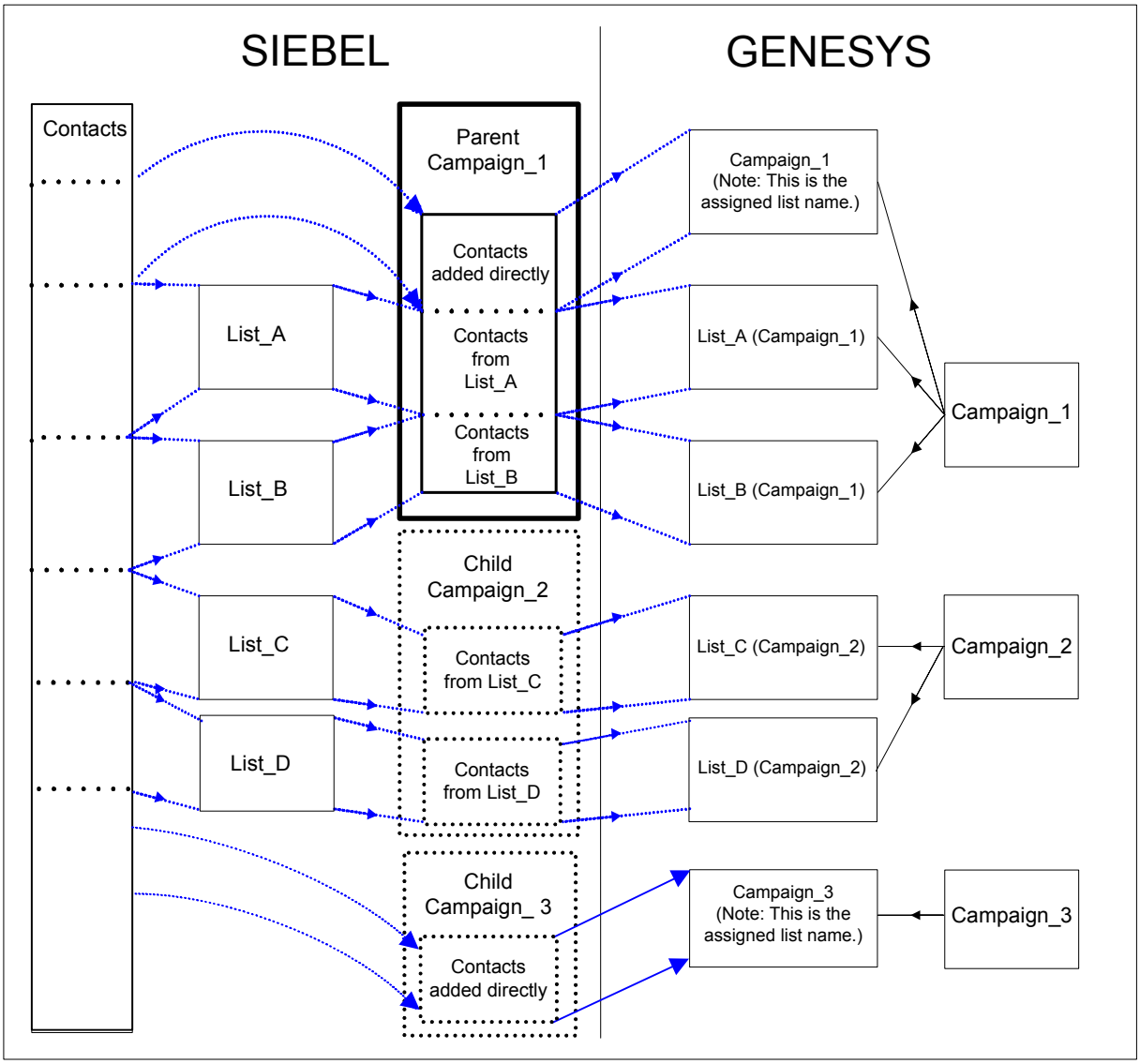

Figure 82: Campaign Synchronization in Regular Mode, with mapping of a Siebel Parent-Child Campaign structure

Figure 82 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 easily recognize them. 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 82 were not parent and children, the Genesys side of the mapping would still be exactly the same.

In `Compatibility` mode, as shown in Figure 83, 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.

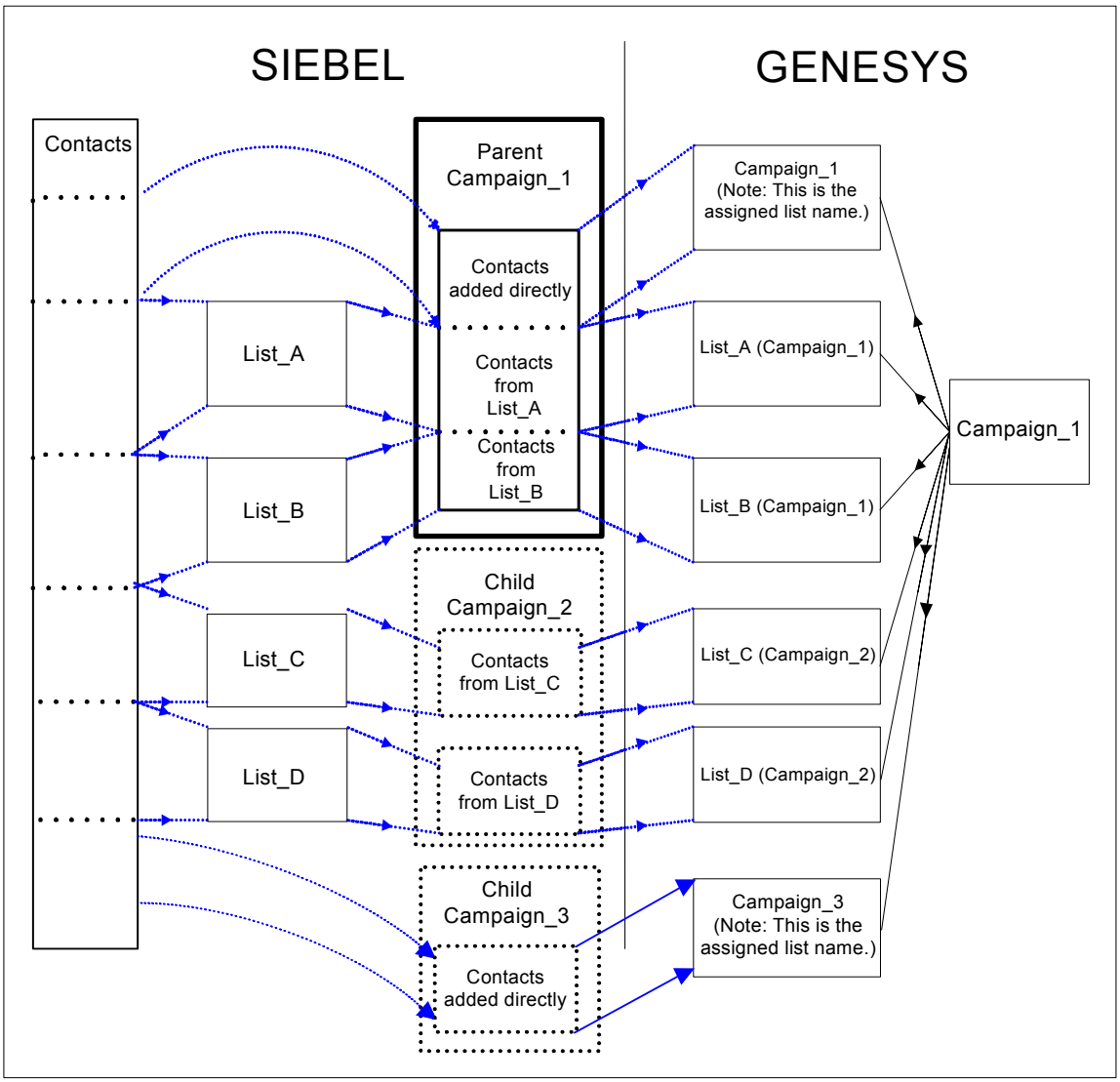

Figure 83: Campaign Mapping in Compatibility Mode, with all lists from the combined Siebel Parent-Child Campaign_1 structure mapped just to Campaign_1

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.

Further details about the functions and the use of campaign synchronization in `Regular` mode are provided in the following section, "Regular Mode".

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. The 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 in the following section, "Compatibility Mode" on page 174.

For further information about changing the mapping mode, see the *G*plus *Adapter 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.

The guidelines for data mapping with the `Regular` mode, corresponding to the 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 shown in Figure 82 on page 168.

Use Cases for Regular Mode

Exporting a Siebel Campaign to Genesys in Regular Mode

Refer to the example of `Campaign_1` in Figure 82 on page 168 for an illustration of this process and its results. Although the illustration in Figure 82 on page 168 labels `Campaign_1` as a parent, the campaign synchronization mapping in `Regular` mode does not process any hierarchical relationships. The synchronization results are the same, regardless of the parent or child labels or relationships.

Note: 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 named "`Campaign_1`", a `Calling List` object named "`Campaign_1`", a `Table Access` object named "`Campaign_1`", and a `Calling List` table with the contacts directly associated with `Campaign_1`. The component then assigns this newly created calling list to `Campaign_1`.
2. For each list or segment with the name "`XXX`" in `Campaign_1` in Siebel, the Campaign Synchronization Component creates a calling list named "`XXX (Campaign_1)`", a `Table Access` object named "`XXX (Campaign_1)`", and a `Calling List` table containing the contacts from the Siebel segment/list. The Campaign Synchronization Component assigns this newly 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, the `Table Access` objects, and the `Calling List` tables with the contacts related to the Siebel lists or segments that 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 when `Regular` mode is selected. The Siebel user may perform many smaller and intermediate tasks, however, which are described in Table 17, “Use Cases Supported in

Regular Mode," on page 172. Several of the normal Siebel tasks (tasks that are associated with the building and maintaining of a campaign) also trigger additional Genesys processes, and these are also described in Table 17 on page 172.

Synchronization Procedures and Related Processes

Table 17 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: 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 82 on page 168 for an illustration of the following processes and their results. Although the illustration in Figure 82 labels `Campaign_1` as a parent, the campaign synchronization mapping in `Regular` mode does not process any hierarchical relationships. The synchronization results are the same, regardless of the parent or child relationships.

Table 17: 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 "Exporting a Siebel Campaign to Genesys in Compatibility Mode" on page 176.)

Table 17: 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
Load the campaign, "Campaign_1"	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 "Exporting a Siebel Campaign to Genesys in Compatibility Mode" on page 176.)
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.	No actions until the campaign reloads.
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 the Phone field or the Do Not Call field has been updated.	No actions until the campaign reloads.

Table 17: 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
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 does 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_1ist` associated with the Genesys Campaign Export Position.	No actions until the campaign reloads.
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

When in `Compatibility` mode for a Siebel campaign tree consisting of parent and child campaigns, the Campaign Synchronization Component creates a single Genesys `Campaign` object that corresponds 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

- When in `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), the 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 83 on page 169 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 in section "Differences Between the Modes" on page 167, 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.

Exporting a Siebel Campaign to Genesys in Compatibility Mode

Refer to the example of Campaign_1 in Figure 83 on page 169 for an illustration of this process and its results. Although the illustration in Figure 83 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: The naming convention applied in this procedure re-applies the names originally assigned to the campaign and its lists.

In Compatibility mode, perform the following procedure when exporting the entire parent-child campaign hierarchy with all its members (refer to the parent campaign called "Campaign_1" in Figure 83) to the Genesys environment.

Procedure: Exporting a Siebel campaign to Genesys in Compatibility Mode

Purpose: To export a Siebel campaign to Genesys in Compatibility mode.

Start of procedure

1. If the parent campaign, Campaign_1, in Siebel does not have the Genesys Campaign Export Position, then:
   a. Create the campaign object Campaign_1
   b. 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.
   c. 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:
   a. 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
   b. 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:
   a. Assign the calling list `YYY` to the campaign `Campaign_1` where `YYY` stands for the Siebel child campaign name
   b. 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
   c. 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, the `Table Access` objects, and the `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 the Siebel environment, assign the Genesys Campaign Export Position to the campaign, `Campaign_1`, and all of its children.

End of procedure

Next Steps

- There are no further steps.

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 18 on page 178 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 83 on page 169 for an illustration of these processes and their results.

Table 18: 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 “Exporting a Siebel Campaign to Genesys in Compatibility Mode” on page 176.)
Load either the parent campaign, `Campaign_1` or any child campaign of it.	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 “Exporting a Siebel Campaign to Genesys in Compatibility Mode” on page 176.)
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 18: 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.	No actions until the campaign reloads.
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`.
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.

Table 18: 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 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.
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`.

Table 18: 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 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 "Exporting a Siebel Campaign to Genesys in Compatibility Mode" on page 176.)
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`.
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`.	No actions until the campaign reloads.

Table 18: Use Cases Supported in the Compatibility Mode (Continued)

What the Siebel Campaign Administrator Does	Condition(s)	What the Campaign Synchronization Component Does
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.
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`.	No actions until the campaign reloads.

Table 18: 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 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.
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 and later

Siebel 7.7 and later implemented a new approach for campaign management processes such as Load Campaign and Launch Campaign. In Siebel 7.7 and later, 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 and later, 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 the Genesys environment. To avoid these 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 the Siebel and Genesys environments:

Procedure:
Synchronizing the Siebel and Genesys environments\

Purpose: To synchronize the Siebel and Genesys environments.

Start of procedure

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

Notes:
- 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.
- In Siebel and later, 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.

End of procedure

Next Steps

- There are no further steps.

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 84 in which the contact records from `List B` in Siebel is stored in the `Calling List C0B` and `Calling List C1B` in Genesys and both lists are included in `Campaign 0`.

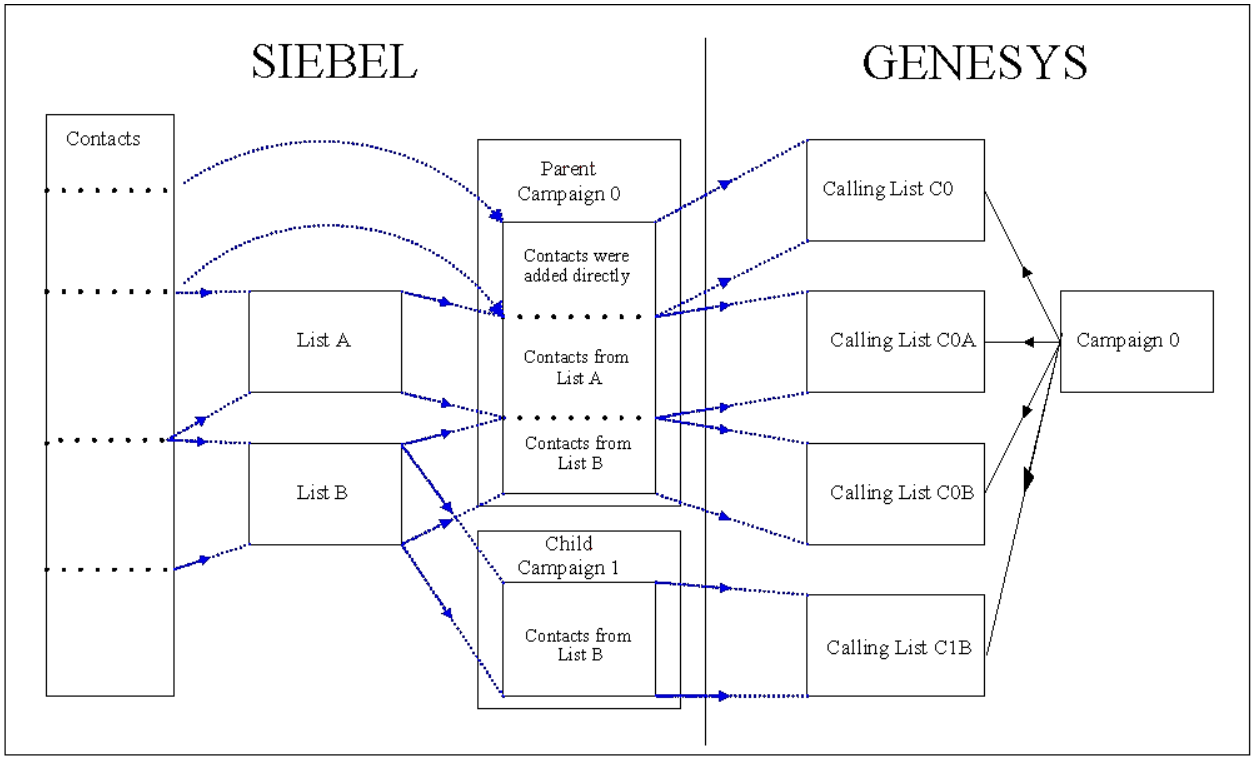

Figure 84: Duplication of Contact Records

Chapter

6 Troubleshooting

This chapter provides some solutions to common problems.

Overview

Use Table 19 to find solutions to some common problems.

Table 19: 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 the Configuration Layer when the information is imported from the Siebel environment.	There might be conflicts between the existing configuration data and the data imported by the G*plus* Adapter for Siebel CRM Configuration Synchronization Component from the Siebel environment to the Genesys environment—for example, in the following scenario: • An agent with the user name, `user1`, is imported by the Configuration Synchronization Component. • A `Person` object (not an agent) with the same user name (`user1`) is created manually in Configuration Manager. Then the Configuration Synchronization Component is not able to successfully complete the import function and produces 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. After the conflicts are resolved, import the affected objects.

Table 19: Problems and Solutions (Continued)

Problem Description	Solution
After making changes to the objects imported by the G*plus* Adapter for Siebel CRM Configuration Synchronization Component into the Configuration Layer and then importing the affected objects from Siebel once again, there are discrepancies between the configuration data in the Siebel and Genesys environments.	Any voluntary changes made to the data in Configuration Manager, where the G*plus* Adapter for Siebel CRM Configuration Synchronization Component stores the agent data, may cause data synchronization scenarios to fail. This failure may cause discrepancies between the configuration data in Siebel and Genesys applications—for example, in the following scenario if: • An agent with the user name of `user1` was previously imported by the Configuration Synchronization Component, but this agent is then removed from Configuration Manager. • A `Person` object (not an agent) with the same user name (`user1`) is created manually in Configuration Manager, • The agent, `user1`, is then imported from Siebel again, Then 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. After the conflicts are resolved, import the affected objects again.
The `Cannot connect to the server` error message is displayed in the Siebel Call Center application.	Check that G*plus* Adapter for Siebel CRM Configuration Synchronization Component is running. Normally, it should be running whenever any 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 the Siebel Server from successfully connecting to the Configuration Synchronization Component. To solve the problem, restore the network connectivity.
Problem: The Configuration Synchronization Component does not reconnect to T-Server.	Change the Advanced Disconnect Detection Protocol (ADDP) timeout parameter.
When accepting the Genesys e-mail interaction, instead of the e-mail view, Siebel displays an `Error Message` view with the following error message: `Cannot connect to the server(SBL-EAI-04115).`	Check that the G*plus* UCS Gateway Server for Siebel CRM is running, and that the corresponding outbound web service was imported containing the correct URL pointing to the UCS Gateway Server.

Table 19: Problems and Solutions (Continued)

Problem Description	Solution
When browsing the Standard Response Library, Siebel shows an "`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. If needed, create it manually (see the *G*plus *Adapter for Siebel CRM Deployment Guide* for more details).
After creating a new Siebel configuration with the G*plus* Universal profile, *or* any changes made in either profile, agent login to the Siebel Server displays the following error message: "`Unable to create a Driver object from driver GenCommDrv with Media-Type-String GPlus CTI Driver(SBL-CSR-00500).`"	Check that the profile, (G*plus* Universal profile) in the Siebel configuration is configured in accordance with the *G*plus *Adapter for Siebel CRM Deployment Guide*.
If an agent logs into Siebel and the G*plus* Communication Server has not yet been started, the Siebel CTI toolbar is inaccessible for this agent.	• Log out of Siebel. • Make sure that the G*plus* Communication Server is started. • Log back into Siebel again.

Related Documentation Resources

The following resources provide additional information that is relevant to this software. Consult these additional resources as necessary.

G*plus* Adapter for Siebel CRM

- *Gplus* Adapter 8.0 for Siebel CRM *Deployment Guide*. This guide lists system requirements and describes how to install and configure the G*plus* Adapter.
- *Gplus* Adapter 8.0 for Siebel CRM *Developer's Guide*. Describes the API (application programming interface) with which you can customize the export of campaigns, campaign contacts, and Do Not Call requests from Siebel to Genesys software.

Genesys

- *Genesys Technical Publications Glossary,* which provides a comprehensive list of the Genesys and computer-telephony integration (CTI) terminology and acronyms used in this document.
- *Genesys Migration Guide*, which provides documented migration strategies for Genesys product releases. Contact Genesys Customer Care for more information.
- Release Notes and Product Advisories for this product, which are available on the Genesys Customer Care website at http://genesys.com/customer-care.

Information about supported hardware and third-party software is available on the Genesys Customer Care website in the following documents:

- *Genesys Supported Operating Environment Reference Guide*
- *Genesys Supported Media Interfaces Reference Manual*

Consult these additional resources as necessary:

- *Genesys Hardware Sizing Guide,* which provides information about Genesys hardware sizing guidelines for the Genesys 8.0 releases.
- *Genesys Interoperability Guide,* which provides information on the compatibility of Genesys products with various Configuration Layer Environments; Interoperability of Reporting Templates and Solutions; and Gplus Adapters Interoperability.
- *Genesys Licensing Guide,* which introduces you to the concepts, terminology, and procedures relevant to the Genesys licensing system.
- *Genesys Database Sizing Estimator 8.0 Worksheets,* which provides a range of expected database sizes for various Genesys products.

For additional system-wide planning tools and information, see the release-specific listings of System-Level Documents on the Genesys Documentation website.

Genesys product documentation is available on the:

- Genesys Customer Care website.
- Genesys Documentation website.
- Genesys Documentation Library DVD, which you can order by e-mail from Genesys Order Management at orderman@genesys.com.

Document Conventions

This document uses certain stylistic and typographical conventions—introduced here—that serve as shorthands for particular kinds of information.

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:

```
80gp_us_11-2010_v8.0.001.00
```

You will need this number when you are talking with Genesys Customer Care about this product.

Screen Captures Used in This Document

Screen captures from the product graphical user interface (GUI), as used in this document, may sometimes contain minor spelling, capitalization, or grammatical errors. 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 the name of an option contains a usage error, the name would be presented exactly as it appears in the product GUI; the error would not be corrected in any accompanying text.

Type Styles

Table 20 describes and illustrates the type conventions that are used in this document.

Table 20: Type Styles

Type Style	Used For	Examples
Italic	• Document titles • Emphasis • Definitions of (or first references to) unfamiliar terms • Mathematical variables Also used to indicate placeholder text within code samples or commands, in the special case where angle brackets are a required part of the syntax (see the note about angle brackets on page 194).	Consult the *Genesys Migration Guide* for more information. Do *not* use this value for this option. A *customary and usual* practice is one that is widely accepted and used within a particular industry or profession. The formula, $x + 1 = 7$ where x stands for . . .
Monospace font (Looks like `teletype` or `typewriter text`)	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. • Code samples. Also used for any text that users must manually enter during a configuration or installation procedure, or on a command line.	Select the `Show variables on screen` check box. In the `Operand` text box, enter your formula. Click `OK` to exit the `Properties` dialog box. T-Server distributes the error messages 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. Enter `exit` on the command line.
Square brackets ([ ])	A particular parameter or value that is optional within a logical argument, a command, or some programming syntax. That is, the presence of the parameter or value is not required to resolve the argument, command, or block of code. The user decides whether to include this optional information.	`smcp_server -host [/flags]`
Angle brackets (< >)	A placeholder for a value that the user must specify. This might be a DN or a port number specific to your enterprise. **Note:** In some cases, angle brackets are required characters in code syntax (for example, in XML schemas). In these cases, italic text is used for placeholder values.	`smcp_server -host <confighost>`

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