

### **Gplus Adapter 8.0**

## for Siebel CRM

## **User's Guide**

The information contained herein is proprietary and confidential and cannot be disclosed or duplicated without the prior written consent of Genesys Telecommunications Laboratories, Inc.

Copyright © 2010–2015 Genesys Telecommunications Laboratories, Inc. All rights reserved.

#### **About Genesys**

Genesys is the world's leading provider of customer service and contact center software—with more than 4,000 customers in 80 countries. Drawing on its more than 20 years of customer service innovation and experience, Genesys is uniquely positioned to help companies bring their people, insights and customer channels together to effectively drive today's customer conversation. Genesys software directs more than 100 million interactions every day, maximizing the value of customer engagement and differentiating the experience by driving personalization and multi-channel customer service—and extending customer service across the enterprise to optimize processes and the performance of customer-facing employees. Go to www.genesys.com for more information.

Each product has its own documentation for online viewing at the Genesys Documentation website or on the Documentation Library DVD, which is available from Genesys upon request. For more information, contact your sales representative.

#### Notice

Although reasonable effort is made to ensure that the information in this document is complete and accurate at the time of release, Genesys Telecommunications Laboratories, Inc., cannot assume responsibility for any existing errors. Changes and/or corrections to the information contained in this document may be incorporated in future versions.

#### Your Responsibility for Your System's Security

You are responsible for the security of your system. Product administration to prevent unauthorized use is your responsibility. Your system administrator should read all documents provided with this product to fully understand the features available that reduce your risk of incurring charges for unlicensed use of Genesys products.

#### Trademarks

Genesys and the Genesys logo are registered trademarks of Genesys Telecommunications Laboratories, Inc. All other company names and logos may be trademarks or registered trademarks of their respective holders. The Crystal monospace font is used by permission of Software Renovation Corporation, www.SoftwareRenovation.com.

#### **Technical Support from VARs**

If you have purchased support from a value-added reseller (VAR), please contact the VAR for technical support.

#### **Customer Care from Genesys**

If you have purchased support directly from Genesys, please contact Genesys Customer Care. Before contacting Customer Care, please refer to the *Genesys Care Support Guide for On-Premises* for complete contact information and procedures.

#### **Ordering and Licensing Information**

Complete information on ordering and licensing Genesys products can be found in the Genesys Licensing Guide.

#### Released by

Genesys Telecommunications Laboratories, Inc. www.genesys.com

Document Version: 80gp\_us\_slcrm\_07-2015\_v8.0.201.00



## **Table of Contents**

List of Procedures		7
Preface		9
	About Gplus Adapter 8.0 for Siebel CRM	10
	Intended Audience.	10
	Making Comments on This Document	11
	Contacting Genesys Customer Care	11
	Document Change History	
	New in Document Version v8.0.201.00	
	New in Document Version v8.0.102.00	12
	New in Document Version v8.0.101.00	12
	New in Document Version v8.0.001.00	12
Chapter 1	Introduction	13
	New in This Release	
	Release 8.0.2.	
	Release 8.0.102.00	14
	Release 8.0.101.00	14
	Release 8.0.001.00	14
Chapter 2	Overview	15
	Siebel and Genesys Computer Telephony Integration (CTI)	
	About the Siebel Call Center	16
	About Gplus Adapter Components	17
	The Communications (CTI) Toolbar and Controls	
	Siebel Toolbar Communication Commands	
	Siebel Activities	
	Voice Component Features	
	Basic Voice Feature	
	Outbound Campaign Feature	
	Universal Callback Feature	
	Expert Contact Feature	23

	Media Routing	24
	Multimedia Component	
	Genesys E-Mail	
	Genesys Chat	
	Configuration Synchronization	
	Campaign Synchronization	
	Features	
Chapter 3	Campaign Synchronization Component Information	33
	Overview	33
	The Conceptual Schema Overview	
	The General Conceptual Schema	
	The Basic Steps of Campaign Synchronization Management	
	The Management Console	
	The Servers View	
	The Campaigns View	
	The Supervisory Panel View	
	The Supervisory Panel / Status Detail View	
	The Supervisory Panel / Request Queue Detail View	
	The Supervisory Panel / Summaries Detail View	
	The Request Queue View	
	The Summaries View	
	The Procedures for the Basic Scenarios	
	Creating a Siebel Server Named Connection Subsystem	
	Configuring a Siebel Campaign for Synchronization	
	Enabling and Disabling a Siebel Campaign for Synchronization	
	Starting and Stopping the Siebel Side to the Genesys Side	
	Synchronization Process	
	Starting and Stopping the Genesys Side to the Siebel Side	70
	Synchronization Process	73
	Synchronizing the Call Results for the Entire Campaign Load or Wave	74
	Manually Synchronizing the Campaign	
Chapter 4	Agent Information	77
	Logging Into the Siebel Server	
	Notification of Interactions	79
	Making Yourself Ready or Not Ready	
	Make Ready/Not Ready Controls	80
	Making Yourself Ready	
	Making Yourself NotReady	
	The Voice Component	83

	Basic Voice Feature	84
	The Outbound Campaign Feature	87
	The Universal Callback Feature	98
	The Expert Contact Feature	101
	The Multimedia Component	102
	Controlling the Agent Status	102
	Navigating to the Current Work Item View	
	Working with Genesys E-mail Interactions	
	Using Workbins	
	Working with the Chat Client	
	Transferring Genesys E-Mail and Chat Interactions Working with Multiple Interactions Using the Genesys Standard Response Library	
	The Media Routing Component	
	Desktop Controls for Processing Siebel eMail Interactions Working with Siebel eMail Interactions Using the Media Routing Component	122
	Logging Out of the Siebel Server	127
	Automatic Log Out in Predictive Dialing Mode	128
	In Case of an Unsuccessful Log Out	128
Chapter 5	Information for Administrators	
	Features for Administrators	
	Logging In to the Siebel Server as an Administrator	
	Accessing the Administration-Communications Functions	
	Creating a Genesys Configuration	
	Adding Agents to the Genesys Profile	134
	Editing the Agent Information	
	Assigning a Login ID to an Agent	
	Configuring the Not Ready Device Command Synchronizing the Siebel Extensions and ACD Queues with the	140
	Configuration Environment	141
	Rule	142
	Synchronizing a Siebel Employee/Agent in a Genesys Configuration Environment	145
	Configuration Synchronization Enhancement	
	Setting the Default Field Values for the Designated Genesys	
	Objects	
	Genesys Agent's Employee ID Mapping Changing the Default Mapping	
	E-Mail Routing	152

	Synchronization of E-mail Content Between Genesys Universal Contact Server and Siebel	153
	Genesys E-Mail Activity Creation	
	Genesys Chat Activity Creation	
	Configuring a Chat Transcript	
	Starting the Configuration Synchronization Component	
	Starting the Campaign Synchronization Component	
	Exporting the Siebel Campaigns to Genesys	
	Deleting the Siebel Campaigns from Genesys	165
	Synchronizing the Time Zones	165
	Managing the Calling Lists	166
	Regular and Compatibility Modes	166
	Differences Between the Modes	167
	Regular Mode	
	Compatibility Mode	
	Mapping Calling Lists	185
Chapter 6	Troubleshooting	187
	Overview	187
Supplements	Related Documentation Resources	191
	Document Conventions	193
Index		195





## **List of Procedures**

Creating a connection subsystem
Creating a CampSynch Configuration object
Linking a campaign to a CampSynch Configuration object
Enabling/Disabling a Siebel campaign for the synchronization to the Genesys side
Starting and stopping the data synchronization from the Siebel side to the Genesys side
Starting and stopping the data synchronization from the Genesys side to the Siebel side
Manually synchronizing the call results
Manually synchronizing a campaign and/or waves
Logging into the Siebel Server
Making yourself ready to use media
Making yourself NotReady
Using the CTI Toolbar's Basic Voice button functions
Transferring a call
Making conference calls or forwarding calls
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
Examples of different ways to utilize the UCB-enabled Siebel Call Center application
Working with the Expert Contact interactions
Working with the Gplus Siebel Multimedia chat client
Siebel prior to 8.1.1.4/8.2.2.4: Transferring Genesys e-mail and chat interactions
Siebel 8.1.1.4/8.2.2.4 or later: Transferring Genesys e-mail and chat interactions to an agent

Siebel 8.1.1.4/8.2.2.4 or later: Transferring Genesys e-mail and chat
interactions to a queue 119
Using the desktop controls to process Siebel eMail interactions 123
Working with Siebel eMail interactions using the Media Routing
Component
Logging out after finishing a call 127
Accessing the Administration-Communications Functions
Creating a Genesys configuration
Adding agents to the Genesys profile
Assigning a Login ID to an agent
Reassigning an agent to a different Siebel organization
Setting the default values for the Business Service User Properties 149
Changing the default mapping of the Genesys Employee ID 151
Assigning the Genesys Campaign Export position to the campaign 161
Adding an agent or place group to the Genesys Campaign object 162
Deleting a Siebel Campaign from the Genesys environment 165
Exporting a Siebel campaign to Genesys in Compatibility Mode 176
Synchronizing the Siebel and Genesys environments\ 184



## 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 *Gplus* 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 *Gplus* 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 *Gplus* 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 *Gplus* Adapter's system requirements, installation, and configuration is provided in the *Gplus 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 <u>orderman@genesys.com</u>.

This preface contains the following sections:

- About Gplus Adapter 8.0 for Siebel CRM, page 10
- Intended Audience, page 10
- Making Comments on This Document, page 11
- Contacting Genesys Customer Care, page 11
- Document Change History, page 11

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

### About Gplus Adapter 8.0 for Siebel CRM

The *Gplus* 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 *Gplus* 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 *Gplus* 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.

#### **Making Comments on This Document**

If you especially like or dislike anything about this document, feel free to e-mail your comments to <u>Techpubs.webadmin@genesys.com</u>.

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

When you send us comments, you grant Genesys a nonexclusive right to use or distribute your comments in any way it believes appropriate, without incurring any obligation to you.

### **Contacting Genesys Customer Care**

If you have purchased support directly from Genesys, please contact Genesys Customer Care.

Before contacting Customer Care, please refer to the *Genesys Care Support Guide for On-Premises* for complete contact information and procedures.

#### **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 *Gplus* 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 *Gplus* 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 *Gplus* 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 Gplus Adapter for Siebel CRM Deployment Guide for further details about the Siebel waves campaign management feature. Also, refer to the Gplus 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.



## Introduction

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

• New in This Release, page 13

### **New in This Release**

This section contains a brief description of the new features in the *Gplus* 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 *Gplus* Adapter for Siebel CRM. Refer to the following new component-specific features:

## Gplus 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 *Gplus* Adapter for Siebel CRM. Refer to the following new component-specific features:

#### **Gplus** Communication Server for Siebel CRM

- Support for multimedia fail over processing for Gplus 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



## **Overview**

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

This chapter is divided into the following sections:

- Siebel and Genesys Computer Telephony Integration (CTI), page 15
- About Gplus Adapter Components, page 17
- The Communications (CTI) Toolbar and Controls, page 18
- Siebel Activities, page 19
- Voice Component Features, page 20
- Media Routing, page 24
- Multimedia Component, page 25
- Configuration Synchronization, page 27
- Campaign Synchronization, page 28

In summary, this chapter introduces the *Gplus* 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 *Gplus* Adapter features.

## Siebel and Genesys Computer Telephony Integration (CTI)

The *Gplus* 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 *Gplus* 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 *Gplus* Adapter must be fully integrated into the Siebel Call Center application.

Installing the *Gplus* Adapter effectively modifies the Siebel Call Center user interface by adding specific CTI controls. Most of the *Gplus* 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 *Gplus* Adapter components and features that are installed at your site and available on your desktop.

**Note:** It is possible to access *Gplus* 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 *Gplus* 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 *Gplus* 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 *Gplus* 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 *Gplus* 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).



Auto Expense Report   Auto Timesheet     Home:   Auto Timesheet     Auto Timesheet     Reset Active Session Court [Ctrl + F8]     MakeChatWorkDremActive   User Preferences     My Homepage     Welcome Back Fg75_01 Lg75_01. Toda     My Activities     New     New     Type     Description     Priority     Auto Expense Report   Auto Timesheet     Reset Active Session Court [Ctrl + F8]     MakeChatWorkDremActive   Update Deshboard   [Ctrl + Shift+P]   Associate   [F8]   Onference Transfer   [Shift+F7]   Release Call   [F12]   View Work Item     Shift+F8]     Date: Jul T			jelp					
File       Edit       Wew       Navigate       Query       Tools       Heip         Image: Ima	3 Back • 🕤 - 💌	) 😰 🏠 🔎 Sea	arch 🔅 Favorites	🛛 🖉 🖓 🖾	}			
My Homepage Welcome Back Fg75_01 Lg75_01. Tods   My Activities     New   Type   Description   Priority   Call - Outbound   Record (1107) phone   Call - Outbound   Record (1110) phone<	Address 🔊 http://gp	vm4/calicenter_enu/s	tart.swe?SWECmd=Lo	ogin8SWEPL=18SWE	TS=1184703754718			
Image: Second auto Expense Report Auto Timesheet       Auto Expense Report Auto Timesheet         Home:       Image: Second Timesheet         Image: Accounts       Image: Second Timesheet         Image: Second Timesheet       Image: Second Timesheet         My Homepage       Welcome Back Fg75_01 Lg75_01. Toda         My Activities       Image: Second Timesheet         Image: Second Timesheet       Shift+F7         New       Type         Description       Priority         Accept Work Teem       Shift+F8         Accept Work	File Edit View Na	avigate Query Too	ols Help					
New       Type       Description       Priority         Call - Outbound       Record(1107) phone       Ready       Consultative       My Calendar         Call - Outbound       Record(1115) phone       Log Out       Initiate Work Item       Initiate Work Item         Call - Outbound       Record(1115) phone       Call - Outbound       Record(1115) phone       Log Out       Initiate Work Item       Initiate Work Item         Call - Outbound       Record(1115) phone       Call - Outbound       Record(1115) phone       Log Out       Initiate Work Item       Initiate Work Item         Call - Outbound       Record(1115) phone       Call - Outbound       Record(1115) phone       Initiate Work Item       Inititem	B 🖪 🕘 🛛 🛎	6 J 🐴 🗹	Advanced Sort	[Ctrl+Shift+O]				Saved Q
Home       Accounts       Communications       Reset Active Session Count       Ctrl + F8       Administration - Product         My Homepage       Welcome Back Fg75_01 Lg75_01. Toda       MakeChatWorkDremActive       Update Deshboard       [Ctrl+Shift+P]         My Activities       Elind Transfer       Chi+F7]       Administration - Product         My Activities       Elind Transfer       Chi+F7]       Administration - Product         New       Type       Description       Priority       Consultative Transfer       Chi+F7]         Accept Work Dem       Shift+F8]       Accept Work Dem       [Shift+F8]         Accept Work Dem       [Shift+F8]       Date: Jul T         Call - Outbound       Record(1107) phone       Initiate Work Item       Initiate Work Item         Initiate Work Item       Initiate Work Item       Initiate Work Item       Initiate Work Item         Call - Outbound       Record(1110) phone       Iog Out       Iog Out       Iog Out         Call - Outbound       Record(1113) phone       Iog Out       Iog Out       Iog Out         Call - Outbound       Record(1163) phone       Iog Out       Iog Out       Iog Out         Call - Outbound       Record(1163) phone       Iog Out       Iog Out       Initio AM		1.00.00			& # %   ●			
New       Type       Description       Profity         Call - Outbound       Record(1107) phone       Initiate Work Item       Initiate Work Item         Call - Outbound       Record(1111) phone       Log In       Initiate Work Item         Call - Outbound       Record(1187) phone       Ready       Initiate Work Item         Call - Outbound       Record(1115) phone       Log Out       Initiate Work Item         Call - Outbound       Record(1115) phone       Not Ready       Initiate Work Item         Call - Outbound       Record(1113) phone       Log Out       Initiate Work Item       Initiate Work Item         Call - Outbound       Record(1139) phone       Toolbar       Initiate Work Item       Initiate Work Item         Call - Outbound       Record(1163) phone       Toolbar       Initiate Work Item       Initiate Work Item         Call - Outbound       Record(1163) phone       Toolbar       Initiate Work Item       Initiate Work Item         Call - Outbound       Record(1163) phone       Toolbar       Initiate Work Item       Initiate Work Item         Call - Outbound       Record(1163) phone       Toolbar       Initiate Work Item       Initiate Work Item	🔐 Home [ 🛅 A	ccounts R=	And the second se	•	MakeChatWorkItemActive Update Dashboard	[Ctrl+Shift+P]	ど Administra	tion - Product
Call - Outbound     Record(1107) phone     Initiate Work Item     09:00 AM       Call - Outbound     Record(1111) phone     Log In     09:00 AM       Call - Outbound     Record(1187) phone     Ready     10:00 AM       Call - Outbound     Record(1113) phone     Log Out     10:00 AM       Call - Outbound     Record(1139) phone     Log Out     10:00 AM       Call - Outbound     Record(1163) phone     Toolbar     11:00 AM		e Welcon	ne Back Fg75_o1	Lg75_o1. Toda	Blind Transfer Conference Transfer Consultative Transfer	[Alt+F7] [Ctrl+F7] [Shift+F7]	- ×	
Call - Outbound     Record(1111) phone     Log In     09:00 AM       Call - Outbound     Record(1167) phone     Ready     10:00 AM       Call - Outbound     Record(1115) phone     Log Out     10:00 AM       Call - Outbound     Record(1139) phone     Log Out     10:00 AM       Call - Outbound     Record(1139) phone     Toolbar     11:00 AM	My Activities				Bind Transfer Conference Transfer Consultative Transfer Release Call View Work Item	[Alt+F7] [Ctrl+F7] [Shift+F7] [F12]	- ×	Date: Jul 💌
Call - Outbound     Record(1187) phone     Ready     Image: Call - Outbound     Not Ready     Image: Call - Outbound     Image: Call - Outbound     Image: Call - Outbound     Record(1139) phone     Image: Call - Outbound	My Activities New	Туре	Description	Priority	Bind Transfer Conference Transfer Consultative Transfer Release Call View Work Item Accept Work Item	[Alt+F7] [Ctrl+F7] [Shift+F7] [F12]	- ×	Date: Jul 💌
Call - Outbound     Record(1115) phone     Log Out     10:00 AM       Call - Outbound     Record(1139) phone     Toolbar     11:00 AM	My Activities New	Type Call - Outbound	Description Record(1107) ph	Priority	Bind Transfer Conference Transfer Consultative Transfer Release Call View Work Item Accept Work Item Initiate Work Item	[Alt+F7] [Ctrl+F7] [Shift+F7] [F12]	- x	Date: Jul 💌 Tuesday 7/17/20
Call - Outbound Record(1139) phone Toolbar 11:00 AM	My Activities New	Type Call - Outbound Call - Outbound	Description Record(1107) ph Record(1111) ph	Priority one	Elind Transfer Conference Transfer Consultative Transfer Release Call View Work Ibem Accept Work Ibem Initiate Work Ibem Log In Ready	[Alt+F7] [Ctrl+F7] [Shift+F7] [F12]	- x	Date: Jul 💌 Tuesday 7/17/20
Cell Orthund Depend(101) phone	My Activities New	Type Call - Outbound Call - Outbound Call - Outbound	Description Record(1107) ph Record(1111) ph Record(1187) ph	Priority one one	Bind Transfer Conference Transfer Consultative Transfer Release Call View Work Ibem Accept Work Ibem Initiate Work Ibem Log In Ready Not Ready	[Alt+F7] [Ctrl+F7] [Shift+F7] [F12]	- x	Date: Jul v Tuesday 7/17/20
Call - Outbound Record(1211) phone	My Activities New	Type Call - Outbound Call - Outbound Call - Outbound Call - Outbound	Description Record(1107) ph Record(1111) ph Record(1187) ph Record(1115) ph	Priority one one one	Bind Transfer Conference Transfer Consultative Transfer Release Call View Work Item Accept Work Item Initiate Work Item Log In Ready Not Ready Log Out	[Alt+F7] [Ctrl+F7] [Shift+F7] [F12]	- x	Date: Jul v Tuesday 7/17/20
	My Activities	Type Call - Outbound Call - Outbound Call - Outbound Call - Outbound Call - Outbound	Description Record(1107) ph Record(1111) ph Record(1187) ph Record(1115) ph Record(1139) ph	Priority           one           one           one           one           one	Bind Transfer Conference Transfer Consultative Transfer Release Call View Work Item Accept Work Item Initiate Work Item Log In Ready Not Ready Log Out	[Alt+F7] [Ctrl+F7] [Shift+F7] [F12]	- x	Date: Jul 💌 Tuesday 7/17/20 09:00 AM 10:00 AM

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.

bel Call Camber - Microsoft Internet Explorer	-IO
Edit Yew Pgwartes Icols Help	
di 🔸 🔘 🕘 😰 🏠 🔎 Search 📫 Favorites 👻 🔂 🖓 💬	
85 💨 http://govra4/calloritor_anu/start.aver15WECrad=Login&SWEPL=1&SWETS=1184703754718	💌 🛃 Go Links
Edit View Newtgate Query Tools Help	ORACLE
[] 争 ] 飞 列 列 列 司 ] (2 通	Saved Queries: Default 💌 🔍 🖉
· · · · · · · · · · · · · · · · · · ·	■ ● / · · · · · · · · · · · · · · · · · ·
Concerning and the second s	
nome 🛅 Accounts 🙀 Contacts 🏨 Opportunities 🛒 Sales Orders 🤱 Serv	rice 📔 Quotes 🛃 Administration - Product
	Edit Layout
Homepage Welcome Back Fg75_01 Lg75_01. Today is Tuesday, July	17, 2007. My Calendar 1 7 11 - ×
Activities	- × Date: 3d - 17 - 2007 - Go
New Type Description PriceRy Activity Call-Outbourd Record(3107) phone	•1 Tuesday 7/17/2007 New   • •
Call- Outbound Record(1110) phone	
Call - Outbound Record (187) phone	09:00 AM
Call - Outbound Record(1115) phone	10:00 AM
Call- Outbound Record(1139) phone	1000 809
Call - Outbound Record(1163) phone	11:00 AM
Call - Outbound Record(1211) phone	1
	12:00 PM
	01:00 PM
	02:00 PM
	03:00 PM
	0430 PM
	05:00 PM
	*10

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).

iebel Call Center - Microsoft Internet Explorer Edit Vew Favorites Iools Help			
18at • 🜍 · 🗟 😭 🔎 Search 👷 Favorites 🥑 🍰 - 🛬 🖂 🚜			
20 (a) http://wdgo762/balcanter_anu/start.ave75WECggdatagen59WEF4_0125WET5=1184709158176			🕶 🚍 Ga- 🛛 Lini
Edit View Navigate Query Tools Help Inbound Cali from 1306			ORACL
		Saved Quertes: Default	<b>.</b> .
■   @ 100000   因 ( 📵 ) 上部改革和 8   ●	.0.0	· ( + + + + + + + + + + + + + + + + + +	
e:	- Children		
Home 🛅 Accounts 🛐 Contacts 🥼 Opportunities 🛒 Sales Orders 🔮 Service 📓 Quotes 👹 Administr	ation - Product		
			Edit Layout
ty Homepage Welcome Back ag2202g3 ag2202g3. Today is Tuesday, July 17, 2007.	My	alendar II 7 1	- ×
y Activities	100000	e 3d + 17 + 2007 + Go	
		day 7/17/2007	New   4 +
	1005	and 1/11/1904)	A INC.
	09:0	0 AM	
	10.0	D AH	
	11:0	MA 0	
	12:0	0 PH	
	01:0	0.014	
	0.00		
	02:0	0.941	
	03:0	0 PH	
	04:0	0.041	
	0.5:0	0 PH	

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).

irens 🕢 http://weigp782/v ie Ecit View Navigate	· · · · · · · · · · · · · · · · · · ·		A Favorites	-						
le Felt User Manipule		and the second se	Cmd=Login&SWEPL=184	RVETS=1184709158176						👻 🔁 60 🛛 Li
										ORACL
	<u> </u>							Saved Qu		<b>. .</b>
🖸 🔢 🕒 00:02:03	3	1 in 1	14)13四四	茶瓶湯 0	inbound Call from 1308			+ do + do +	11、11	
ntacti   Home   🍞 Account ntacts Home   Contacts					rvice 📔 Quotes 🕌	Administration	- Product			
All Contacts 🖃 🕴			Query							No Records 🛛 🖓
Last Name . Fin	and the second					State	Dec	tal Code Em		Contact Method
Last Barrie 1 Fin	st Name	Mr/Hs	Account	Work Phone #	Yersonal Address City		1			
	st Name	Pir/Hs	Account	Work Phone #	Yersional Address City	2010				
	Query		Account	Work Phone #	Yerisonal Address City					No Records
			Account Work #:	Work Phone #	Account:	u	500			
Neru •   Neri				Work Phone #			54 X			
Nenu + Neni M			Work #:	Work Phone #	Account		54 X	H T		

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 Gplus 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 *Gplus* 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 *Gplus* 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 *Gplus* 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.

Edit Yes Past	ADDRESS INCOME STATES									110
										4
	3 G / Search	Favarites 🦿	ALC: NAME OF							
ne 💽 http://gpvml	and the second								- 0 60	Links
Edit Versi Nevag	gane Query Tools	ieb						1	ORA	CLE
10 a	BER	1 2 2					Saved Queries:		41	0,0
(1) 00:00 17	13	1.4.41	5日日日日	->E-mail from dgurevyc@mt	eti-009	0 0 a b a	1 1 . 1 . 0			
esys 😭 Home actions   Workbern		Contacts	Opportunities	📕 Sales Orders   🧐 Service	🗟 Quotes 🛃 Ar	dministration - Product				
bound Email				and the second sec	Outbound Email				1	
enu • Reply	Repty All Mark 0	ione Contacts			Menu *					
From daurey	vyo@mbic-tH009				Toc					
	<800-lf-condide				Ce					
To abl sab					860					
¢.	ing C-mail sample				Subject:					
¢.	ng C-mail sample				Subject: Attachments:			-		
Cc Subject Incomm	eccage.							1		
Cc Solijest Incomm Itadomenta: ET Hill This is a test mer	eccage.				Attachments:			<u>व</u> र		
Cc Subject Incomm tradments: E Hil This is a test men Have a nice day!	essage.			-		1		2 2		
Cc Subject Incomm tradments: E Hill This is a test men Have a nice day! Suggestions	essage	3 Solound Attachme	erta 🚺 Outburnd Attach	El se	Attachments:	3		2 2		
Cc Subject Incomm tradments: E Hill This is a test men Have a nice day! Suggestions   Suggestions   Feau - Pre	ssage			2 monta	Attachments:			2 2	1-3 of 3	, (
Cc Subject Incomm tradments T Hil This is a test men Have a nice day! Have a nice day! Suggestions   feru = Pre Name	essage	3nbound Attactme Description	orta Outbound Attach Attachemistra	-	Attachments:	Active		2 1311 [24	1-3 of 3	
Cc Subject Incomm tradments T Hil This is a test men Have a nice day! Have a nice day! Suggestions   teru - Pre Name	Inconfedge Mitmager Contemport	Description	Attachments	-	Attachments:	Active		2 1.511 [221	1-1 of 3	

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 *Gplus* 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.

iebel Call Center - Microsoft Internet Explorer						
Edit Yess Mavantes Iools Help						
ack - 🔿 - 📄 🚓 🕼 🔎 Search 🦕 Favortes  🗌	2. (s) [3.					
er 🙀 http://gpvmi:8080/start.svee					2	🔁 Go
Edit Vew Annuprite Query Tools Help [03:56-06]	PADHEN: How are You?				0	RAC
				Saved Queries:		₩! C
15 A + A + 15 N = 10 10 10 10 10 10 10 10 10 10 10 10 10	西部部落 @ pichat	tressestoom a@a.com		0 - IF - IF -		
A DAMAGE TO A DAMAGE AND A	Per ma and and an Loone	regeerrentegeren		N T LAN TO MILLER		
sys 🧟 Home 🛅 Accounts 🔢 Contacts 🌆	Opportunities 🗐 Sales Or	rders 🤱 Service 🔒 Quote	s 🛃 Administration - Produc	at i		
ctions   Workbien						
SendTranscost Koowledge Manager	Ched:Speling	and and a second				
	and the Martine Trans					
Categories	mill/CE-clair-protocological	review Apply	Westerna .	11 100040000011		1-3073
e D siebel	Response Text	Description some SP sample	Type StandardResponse	Active	Attachnients	
E Catt			a column disp. StandardResponse		N Y	_
월 🤐 Categories 슈 🎒 Responses		ed neit approved	StandardResponse	N	N	
Finit approved Finit approved Finit approved Finit approved Finit approved	1					
Chart Messages (2016) 000 (2020/000 - Non-Year)	j.			*		Ø Inst

Figure 7: Agent's Chat Screen

### **Configuration Synchronization**

*Gplus* 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 Gplus 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 Gplus 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 Gplus 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 *Gplus* 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, page 33
- The Conceptual Schema Overview, page 34
- The Management Console, page 45
- The Procedures for the Basic Scenarios, page 67

#### **Overview**

The 8.0.1 or later version of the *Gplus* 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, page 34
- The Synchronization Request Queue Component, page 38
- The Management Console, page 45
- The Procedures for the Basic Scenarios, page 67

#### **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, page 34
- The Principles of the Data Flow, page 36

## 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, page 39
- The Synchronization from the Genesys Side to the Siebel Side, page 40
- The Synchronization of Parallel Campaigns, page 42
- The Synchronization Modes, page 43
- The Basic Steps of Campaign Synchronization Management, page 44

#### 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** 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 Gplus 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 Gplus 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.

to can non nangoto	Query Tools Help						ORACLE
۵ 🖌 🛛 🕍 🖗					Saved Queries:		<b>v</b> 😵
rvers:							
Home 📋 Account	s 🔠 Contacts 👫 Opportunitie	es 📔 Quotes 🐺 Sales Di		Administration - Ca			
			Supervisory P	anel   Request Queue	Summaries Campaig	ns Servers	
Synchronization S	ervers Menu - New Delet	te Query					
Name	Primary Connection Subsystem	Backup Connection Subsystem	Execution Order Fo	lder			
CampSynch Server 1	CampSynch Server 1 Primary		Original Srv	_1			
CampSynch Server 2	CampSynch Server 2 Primary	CampSynch Server 2 Backup	Campaign Srv	_2			
Communities Woodsfil			Coll Deculto V	Varleflaur			1.42
	W p Refresh	10	€2 Call Results V Menu ▼   Star				1 of 2
			Menu 🗸 🔰 Star		Started At:	H	1 of 2
	p Refresh Started At: 11/5/20	12 01:21:56 📓					1 of 2
Menu - Sart St	xp Refresh		Menu 🗸 🔰 Star		Started At:	8	1 of 2
Menu 🕶 📄 Status:	p Refresh Started At: 11/5/20	12 01:21:56 📓	Menu 🗸 🔰 Star				1 of 2
Menu - Sart St	p Refresh Started At: 11/5/20	12 01:21:56 📓	Menu 🗸 🦷 Star Status:	8 Stop Refresh	Stopped At:		1 of 2

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	Туре	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.	

Column	Туре	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.

Column	Туре	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. <sup>a</sup>	
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. <sup>a</sup>	Hidden by default

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

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

Table 1.	Tho	Columne	of the	Synchronization	Sorvor A	nnlot	(Continued)
Table 1.	The	Columns	or the a	Syncinonization	ServerA	ppier	(Commueu)

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.

	Home 📔 A	ccounts	Co	ntacts	Administra	tion - Proe	luct 📳	Opportuniti	es 📋	Quotes	Fleet Management	Admi
s	ynchronizat	tion Ser	vers	Menu 🔻	New	Delete	Query					
	Name	Primary	Connect	i Backup	Con Executi	on Ore Fo	lder Cam	paign Folder	Calling I	ist Folder.	Table Access Folder	•
>	Julia_ip2014_win	Gplus Cam	paign Syn	ı	Priority		\SITE	_Julia \UNIT4\C	\SITE_Ju	ia\UNIT4\Ca	ll \SITE_Julia\UNIT4\Tabl	e access

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	<b>Workflow Applet</b>
----------	-------------	-----------------	------------------------

Column	Туре	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	Туре	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:

Edit View I	Navigate Query Tools Help							ORACL
🍝 ] A	2 🖬 🛛 📇 🗃					5	iaved Queries:	<b>v</b> 🔇
paigns:			10					
Home 📋	Accounts 🔠 Contacts	Upportunitie	s 📘 Quotes	🦼 Sales Or				
					Supervisory Panel   Re	squest Queue   Sur	maries   Lampaigne	<ul> <li>Dervers</li> </ul>
ampaigns	Menu - New Delete	Query Enab	le Synchronization	Disable Synchr	onization			1-3 of 3
Campaign	Server	Enabled	Mode	Priority	Call Results Batch Mode	Summary	Subfolder	Delete On Suspend
Campaign1	CampSynch Server 1	¥	Full	0	N	Y		Y
Campaign2	CampSynch Server 1	N	Incremental	0	N	Y	camp2	Y
Campaign3	CampSynch Server 2	Y	Manual	0	N	N		Y
ne								Local intranet

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	Туре	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.	

Column	Туре	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:	When a campaign is marked as disabled for synchronization.	
			Campaign		
			<ul><li>Calling List</li><li>Table Access</li></ul>		
			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.</folder></subfolder></folder>		
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 Campai	gns Applet	(Continued)
----------	-------------	---------------	------------	-------------

Column	Туре	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. <b>Note:</b> This mode is not implemented.		Hidden column. The functionality is not implemented. The value is ignored.

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

## **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:

▼ (% rvers 1-2 of 2
1-2 of 2
1 - 2 of 2
1-2012

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.

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.

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

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:

A Los	2 2 12	3		Saved Queries:	<b>v</b>
quest Queue:		2		Serve galants	<u> </u>
Contraction of the second second	Accounts Ra C	ontacts 👫 Opportunities 📔 Quotes	Sales Ord	ers 🧏 Service 😂 Administration - Campaign Synchronization 🔻	
		dh obbarrance 🗖 farres		Supervisory Panel   Request Queue   Summaries   Campaigns   Servers	
				Safet (sol) ( and 1 undated dates 1 sources 1 control to 1 periods	
Campaigns	Construction of the local division of the lo	ery Refresh			1 - 2 of 2
Campaign	Priority	Mode			
Campaign1	0	Ful			
Campaign3	0	Manual			
Status Re Menu v D	equest Queue 5	mmaries			1 - 10 of 10+
	equest Queue S	ummaries Data File Name	Status	Status Message	1 - 10 of 10+
Menu 🕶 🕴 Di	elete		Status READY	Status Message	1 - 10 of 10+   1
Menu - 1 0 Load #	Wave #	Data File Name	and and conserved and and	Status Message	
Menu V Load #	Wave #	Data File Name ./_GenesysCampSyncMessage_1-2661.xml	READY	Status Message	
Menu   Load #  2  2  2	Wave # 0 2	Data File Name /_GenesysCampSyncMessage_1-2661.xml /_GenesysCampSyncMessage_1-2662.xml	READY READY	Status Message	
Menu   Load #  2  2  2  2  2  2  2  2  2  2  2  2  2	Wave # 0 2 2	Data File Name ./_GenesysCampSyncMessage_1-2661.xml ./_GenesysCampSyncMessage_1-2662.xml ./_GenesysCampSyncMessage_1-2663.xml	READY READY READY	Status Message	
Menu   Load #  2  2  2  2  2  2  2  2  2  2  2  2  2	Wave # 0 2 2 2 2 2	Data File Name ./_GenesysCampSyncMessage_1-2661.xml ./_GenesysCampSyncMessage_1-2662.xml ./_GenesysCampSyncMessage_1-2663.xml ./_GenesysCampSyncMessage_1-2664.xml	READY READY READY READY	Status Message	
Menu   Load #  Load #  2  2  2  1  1	Wave # 0 2 2 2 2 0	Data File Name /GenesysCampSyncMessage_1-2661.xml /GenesysCampSyncMessage_1-2663.xml /_GenesysCampSyncMessage_1-2664.xml /_GenesysCampSyncMessage_1-2604.xml	READY READY READY READY READY	Status Message	
Menu   Load #  Load #  2  2  2  1  2  2  2  2  2  2  2  2  2	Wave # 0 2 2 2 2 0 0 0	Data File Name ,GenesysCampSyncMessage_1-2661.xml ,GenesysCampSyncMessage_1-2663.xml ,GenesysCampSyncMessage_1-2664.xml ,GenesysCampSyncMessage_1-2DVP.xml ,GenesysCampSyncMessage_1-2DVP.xml	READY READY READY READY READY READY	Status Message	
Menu   Load #  2  2  2  2  2  2  2  2  2  2  2  2  2	Wave # 0 2 2 2 2 0 0 0 0	Data File Name /_GenesysCampSyncMessage_1-2661.xml /_GenesysCampSyncMessage_1-2663.xml /_GenesysCampSyncMessage_1-2664.xml /_GenesysCampSyncMessage_1-2604.xml /_GenesysCampSyncMessage_1-20VR.xml /_GenesysCampSyncMessage_1-20VR.xml	READY READY READY READY READY READY READY	Status Message	

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.	

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.

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

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:

File Edit View Navigate Query 1	Tools Help		ORACLE
🌐 🔟 🛛 🗛 💆 📓 🖄		Saved Queries:	👻 💐
Summaries:		dministration - Campaign Synchronization 🔻	
	Supervisory Pan	el   Request Queue   Summaries   Campaigns   Servers	
Campaigns   Menu -   Q	uery Refresh		1 - 2 of 2
Campaign Priority	Mode	Request: 'CampSynch - Merge Calling List Commit'	
Campaign1 0	Ful	Parameters:	
Campaign3 0 Status Request Queue Su Menu - Load # Wave #	Summary	CampaignName = 'Campaign1_Load_2' ListName = 'Campaign1_Load_2. Wave_2' Actions: [D8] table 'C1T_271_neet' has been dropped [D8] index 'C1T_271_copy_rectstat_idx' has been created [D8] index 'C1T_271_copy_rectype_idx' has been created [D8] index 'C1T_271_meet' has been created [D8] index 'C1T_271_meet' has been created [D8] index 'C1T_271_meet_after_idx' has been created [D8] index 'C1T_271_meet' has been renamed: 'C1T_271 [D8] table 'C1T_271_copy' has been renamed: 'C1T_271	1-6 of 6
> 2 2 2 2	Request: 'CampSynch - Merge Calling List Commit/ Parameters: CampaignName = 'Campaign Request: 'CampSynch - Merge Calling List Data' Parameters: CampaignName = 'Campaign1		
2 2	Request: 'CampSynch - Merge Calling List Begin' Parameters: D CampaignName = 'Campaign'		
2 0	Request: 'CampSynch - Create Campaign' Parameters:  CampaignName = 'Campaign' Load		
2 0	Request: 'CampSynch - Delete Campaign' Parameters:  CampaignName = 'Campaign1_Load		
1 0	Request: 'CampSynch - Delete Campaign' Parameters: CampaignName = 'Campaign1_Load	1'DActions: D [CME] 11/5/2012 02:44:23 AM	
Done			O of 0     Local intranet

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:

t
;

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.

uest Queue:								
Home Dia Accounts	🔠 Contacts 📙	Opportunities	📔 Quotes Ӌ	Sales Orders	😤 Service 😂 Ad	ministration	- Campaign Synchronization 🛛 🗢	
					Supervisory Panel	Request Qu	eue   Summaries   Campaigns   Servers	
equest Queue   Men	u 🕶 📔 Delete	Refresh						
Server	Campaign	Load #	Wave #	Priority	Data File Name	Status	Status Message	
CampSynch Server 2	Campaign3	2	0	0	./_GenesysCampSyr	READY		
CampSynch Server 2	Campaign3	2	2	0	./_GenesysCampSyr	READY		
CampSynch Server 2	Campaign3	2	2	0	./_GenesysCampSyr	READY		
CampSynch Server 2	Campaign3	2	2					
		2		0	./_GenesysCampSyr	READY		
		2	2	0	.[_GenesysCampSyr	READY		
		2	2	0	.[_GenesysCampSyr	READY		
		٤	2	0	./_GenesysCampSyr	READY		
		٤	2	0	./_GenesysCampSyr	READY		
		£	2	0	./_GenesysCampSyr	READY		
		2	2	0	-[_GenesysCampSyr	READY		
		2	2	0	./_GenesysCampSyr	READY		
		2	2	0	-[_GenesysCampSyt	READY		
		2	2	0	-[_GenesysCampSyt	READY		
		2	2	0	.[_GenesysCampSyt	READY		

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.	

Column	Description	Comments
Data File Name	The path to the request data file. Can be used to obtain the request details.	
Status	<ul> <li>The request execution status. The possible values are:</li> <li>INIT: the request is in the initialization state.</li> <li>READY: the request is ready for execution.</li> <li>FAILED: the request execution failed with an unrecoverable error.</li> </ul>	
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.

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

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:

	Home Dia Accounts	S BE Contacts	in Opportu	nities 📔 Quotes	i 🐺 Sales Orders 🙎 Service 😂 Administration - Campaign Synchronization 🔻 Supervisory Panel   Request Queue   Summaries   Campaigns   Servers
Su	ummaries   Menu	Refresh			1 - 6 of 6
ł	Server	Campaign	Load #	Wave #	Summary Created 7
L	CampSynch Server 1	Campaign1	2	2	Request: 'CampSynch - Merge Calling List Commit'□Parameters: □ CampaignName = 11/5/2012 02:44:39 AM
4	CampSynch Server 1	Campaign1	2	2	Request: 'CampSynch - Merge Calling List Data'□Parameters: □ CampaignName = 'C 11/5/2012 02:44:35 AM
H	CampSynch Server 1	Campaign1	2	2	Request: 'CampSynch - Merge Calling List Begin'⊡Parameters: □ CampaignName = '( 11/5/2012 02:44:33 AM
H	CampSynch Server 1	Campaign1	2	0	Request: 'CampSynch - Create Campaign'⊡Parameters: 🗆 CampaignName = 'Campa 11/5/2012 02:44:27 AM
H	CampSynch Server 1 CampSynch Server 1	Campaign1 Campaign1	2	0	Request: 'CampSynch - Delete Campaign' Parameters: CampaignName = 'Campai 11/5/2012 02:44:25 AM Request: 'CampSynch - Delete Campaign' Parameters: CampaignName Request: 'CampSynch - Create Campaign'
					GenesysTemplateCampaign = " (not implemented Actions: [CME] Root folder 'JSrv_1' already exists [CME] Campaign 'Campaign1_Load_2' is created

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, page 67
- Configuring a Siebel Campaign for Synchronization, page 69
- Enabling and Disabling a Siebel Campaign for Synchronization, page 71
- Starting and Stopping the Siebel Side to the Genesys Side Synchronization Process, page 72
- Starting and Stopping the Genesys Side to the Siebel Side Synchronization Process, page 73
- Synchronizing the Call Results for the Entire Campaign Load or Wave, page 74
- Manually Synchronizing the Campaign, page 75

## **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
  - 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:

 $\verb+host++$  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.

Ð	🔬 🖌 🏹 🛃 🖌 🚵	<b></b>			Saved Queries:	- 🥰
	rprise Profile Configuration: Home	Contacts 📳 Opportuni	ies 🔰 Sales Or		erver Configuration	
I	SBA_80 Siebel Enterpris	e Server		Enterprise Explorer   Enterprise	ses   Servers   Job Templates	
Ì						
		nt Definitions System Alerts	Profile Configur	ation Parameters Synchronize		
М	lenu Vew Query	Alias	_	Subsystem Type	Description	-7 of 8+   ⋥
>	CampSynch Server 1 Primary		nchSrv1Primary	HTTPSubSys	Connection Subsystem the Primary Ca	mpSynch Serve ᆂ
	Object Manager Cache	ObjMgr		InfraObjMgrCache	Object Manager Cache Parameters	<u> </u>
	Administrator Email Alerts		nailAlert	EmailNotification	Configuration for sending automated notification ema Remote SMQ Receiver Dispatch parameters SMQ Dispatch parameters eTraining LMS HACP Adapter	
	SmgRTSDispatchSubsys	SmqRTS	DispatchSubsys	EAITransportDataHandlingSubsys		
	SmqDispatchSubsys	SmqDisp	atchSubsys	EAITransportDataHandlingSubsys		
	eTraining LMS HACP Adapter	HACP		EAITransportDataHandlingSubsys		
1	Siebel Echo EAI Transport Dispatch	Parameters SiebelEd	ho	EAITransportDataHandlingSubsys	Siebel Echo EAI Transport Dispatch	*
0	rofile Parameters   Men	u 🕶 Query Delete	Parameter Override	Reset Advanced Hidden		1-5 of 5 🗐
	Parameter	Alias	Data Type	Value	Description	
	HTTP Content Type Header Value	HTTPContentType	String	12280000	The explicit value for the Content-	Type: header to ov
	HTTP Request Body Template	HTTPRequestBodyTemplate	String		Template for explicitly specifying B	ody part of data Re
	HTTP Request Method	HTTPRequestMethod	String	POST	HTTP Method to use for Request(s	)
>	HTTP Request URL Template	HTTPRequestURLTemplate	String	http://myhost.mydomain:19001	Template for specifying URL for Request(s)	
	HTTP Sleep Time	HTTPSleepTime	Integer	120000	The timeout interval on login, send	, and receive requ

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.
- 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.
- 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.
- 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.
- 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.
- 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.
- 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.
- 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



## **Agent Information**

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

This chapter covers the following topics:

- Logging Into the Siebel Server, page 78
- Making Yourself Ready or Not Ready, page 80
- The Voice Component, page 83
- The Multimedia Component, page 102
- The Media Routing Component, page 122
- Logging Out of the Siebel Server, page 127

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
- Gplus 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.



	- Microsoft interne gvoribes Ipols ti			
		nn 😒 Favoritas 🕘 💭 - 🖕 🗔		
		art.sve?SWECnd=Login6SWEPL=18_st=DK3woogP0v6gCudd#tvFR.gl		💌 🛐 Go Linka
	store of a bound before the first because		WOTTIN DE CONSUMINATION COME LOND DE CONSUMERON DIN SUN SUN SUN SUN SUN SUN SUN SUN SUN SU	And a state of the local division of the loc
	wigste Query Too	becaulty -		ORACLE
19 9 1 7	1 1 2 2		Saved Queries: 0	efault 🖉 😋 🖉
ga aa aa 🕑		집) 本) 本(部왕화왕왕) @[		
Hanner 🛅 Au	ccounts 🔠 Con	stacts 📴 Opportunities 🐺 Sales Orders 🚊 Servic	a 🔓 Quotes 😥 Administration - Product	
				Edit Layout
ty Homepage	e Welco	me Back Fg75_o1 Lg75_o1. Today is Wednesday, Augu	st 08, 2007. My Calendar 1 7 31	- ×
				201
ly Activities			- × Date: Aug - 8 - 2007 -	60
New	Туре	Description Priority Activity	Wednesday 8/8/2007	Nev   + +
	Cal-Outbound	Record(1107) phone	*	<u>*</u>
	Cal - Outbound Cal - Outbound	Record(1111) phone Record(1187) phone	PA 0050	
-	Call- Outbound	Record (115) phone		
-	Call - Outbound	Record (1139) phone	10:00 AM	
-	Call - Outbound	Record 1163 phone	, 11:00 AM	
1	Call - Outbound	Record(1211) phone		
			12:00 PM	
			01:00 PM	
			112:00 PM	
			02:00 PM	
				_
			64:00 PM	
			05:00 PM	
			(16-00 DM	*
			My Alerts	- x
			Abstract Message Body	

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, page 80
- Making Yourself Ready, page 81
- Making Yourself NotReady, page 82

## 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		Corresp	onding Sub-B	uttons			
Login to All Channels	Login to Voice		Login to Multimedia				
Logout from All Channels	Logout from Voice		Logout from M	Iultimedia			
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 Incom	ing 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

For all media channels, click the Not Ready button, (see Figure 26 on page 83).
 A dialog hav append (see Figure 27 on page 82) in which you can anter

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

Please select the reason	n for changing status to Not-Ready - Microsoft Internet Explorer	
Query Go Cancel	Find Type 💌 Starting with	Go 1-3of3 📃
	Туре 🚔	
>	Gone for break	
>	Lundh	
>	Restroom	
		Clear OK Cancel



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.



0

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<br/>hold6.Click the Hold button.Retrieving a call<br/>from hold7.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

Gplus Adapter 8.0 😂

#### 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	1.	Click the Conference Transfer to button.
conference call	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	4.	Enter the forwarding extension.
forward request	5.	Click the Set Forward button. Calls are forwarded to this DN.
Cancelling a call	6.	Enter the forwarding extension.
forward request	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 *Gplus* 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 *Gplus* 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<br/>Preview Dialing<br/>ModesThe Preview and Push Preview dialing modes are recommended for<br/>low-volume, high-value campaigns (see sample in Figure 28 on page 89).Predictive Dialing<br/>ModeThe Predictive dialing mode automatically dials calls from a calling list and<br/>predicts agent availability. It is recommended for high-volume, low-value<br/>campaigns.Progressive<br/>Dialing ModeThe Progressive dialing mode automatically dials calls from a calling list only<br/>when an agent is available. It is recommended for high-volume, high-value

campaigns.

Siebel Call Center - Microsoft Internet Explo	rer							
le Edit View Favorites Iools Help								1
) Back. * 🔿 - 💽 😰 🐔 🔎 Search 🌸	Pavortes 🙆 🙆 🖏	. 🖬						
drass 🔊 http://gpvin4/calicenter_enu/start.swe?	SWECInd=Login8/SWEPL=1	85WET5=1184703754718						💌 💽 Go 🛛 Links
File Edit View Navigate Query Tools Help								ORACLE
8 🖬 🕸   🕹   👫 🖬 😫 🛛 🖉						Saved Queries:		T 🔍 🔍
🕒 00:01:42	<u>本) 최왕</u> 왕중	· 新海 · Preview	interaction from 6533	1555100 . 🗩 🗊 @ 🎮	4.4.15	· 1 ·   0		0 9 P 4
ampaign:								
Home 📴 Accounts 🔢 Contacts	p Opportunities	🖉 Sales Orders 🛛 😤 Ser	vice 🔓 Quotes	🛃 Administration - Product	Campaigns			
				Charts   Explorer	Campaigns Cam	spalgn Members		
outb75_camp3								🔄 1 of 1+ 🕨
Menu • Query								
Campaign Namer* outb75_camp3	Planned Start:* 3,12	2/2007 03:20:00 📓	Status: Launch	ed 💌 Region:	9			
Campaign Coder* 1-337333	Planned End:* 7,12	0/2015 09:00:00 🔣	Priority:	Organization:	Outbound_75 E			
Type:	Execution Period:	23	Category: Sales	· Group:	ы			
Objective:				Team	OUTERS H			
Activities Calendar My Contacts/Prosp								
Menu  Pidk Contacts Pidk Prospects								1-1#1 🔛
Done Date/Time Type		ast Narr Prospect Last Nar F	_	Title Status	Outcome	Organization Owr Position Owner	Load #	Offer Name
> Contr			13_075_1	Unknown		Outbound_75, INTE Telemarketing	2	Campaign3_offer
1								1
4 C3_g75_1 Peru*								1 1 1 1 1 1
Menu * Cancel Query							_	¥
Menu				Account Information			_	¥
Menu • Query Personal Information Contact Last Name: C3_gi		Contact First Name:	ch_ga_j	Account				1 (i 1 df 1
Menu • Control Query Personal Information Contact Last Name: C3_pi Last name of the prospect:	ಗ್ರುಟ್ಟ	Prospect First Name:	ch_srt_1	Account	E CONTRACTOR		_	¥   1 df 1
Menu * Query Personal Information Contact Last Name: C3_5 Last name of the prospect: PtyPe:			നുമു;	Account Site D68 Industry	с с	u	_	141
Menu • Control Query Personal Information Contact Last Name: C3_pi Last name of the prospect:		Prospect First Name:	ch_art_i	Account Six D&B Industry Industry	к С	<u>и</u>	_	1 of 1
Menu * Query Personal Information Contact Last Name: C3_5 Last name of the prospect: PtyPe:		Prospect First Name:	ch_prt_1	Account Six DBB Industry Industry DUNS #		2		1 df 1
Mero  Personal Information Contact Last Name: C3_g Last name of the prospect: PhyNe: Phidde Name:		Prospect First Name:		Account Site D&B Industry Industry DUNS # Work Fac #		н		1 of 1
Meru		Prospect First Narse: Job Title: Position Owner:		Account Six DBB Industry Industry DUNS #		ц		¥
Meru		Prospect Pint Name: Job Title: Position Owner: Organization Owner:	Telenarkating 🖂	Account Site D&B Industry Industry DUNS # Work Fac #		3	_	1 af 1
Meru * Contra Query Personal Information Contact Last Name: C3_g Last name of the prospect: Phylin: Phylin: Phylin: Campaign Status # of Attempts  0 Cal Status: Ukinown Cal Status: Ukinown	T T	Prospect Pint Name: Job Title: Position Owner: Organization Owner:	Telemarketing Outbound_75, INT 2/22/2007 04:56:2 B	Account Site DiaB Industry Industry DURS J Wark Pau # Time Zond		2	_	1 1 1 1
Menu * Contract Last Name: C3_5 Contact Last Name: C3_5 Last name of the prospect: PhyNe: Piddle Name: Campaign Status of Attempts; 0 Call Status: Univoim Call Status: Univoim	10 10 10 10 10 10 10 10 10 10 10 10 10 1	Prospect Pirst Name: Job Tible: Position Owner: Organization Owner: Updatest*	Telemarketing Outbound_75, INT 2/22/2007 04:56:2 B	Account Ser DBD Industry Industry DURS # Wask Pace # Time Zone Annual Revenue		2	-	10/1
Meru * Contact Last Name: (2),5 Personal Beformation Contact Last Name: (2),5 Last name of the prospect: Mights: Mights: Mights: Piddis Name: Campaign Status af of Attengts: Call Status: Uninoun Call Status: (1),19,2000	10 10 10 10 10 10 10 10 10 10 10 10 10 1	Prospect First Name: Job Téle: Position Owner: Organization Owner: Updated:* Updated By:	Telenarlating Outbound_75, INT 2/22/2007 04:56:2 G75_01	Account Ser DBD Industry Industry DURS # Wark Pace # Time Zone Annual Revenue Contact Information				1 df 1
Mero * Query  Personal Information  Contact Last Name: (3, g) Last name of the prospect:  Mr/Me:  Model Name:  Campaign Status  af of Attergts    Call Status: Uknown Call Outcome:  Reachedule Tree: \$1/0,000 Createst* 3,022,000	10 10 17 04:25:1 18 17 05:23:4 18 17	Prospect First Name: Job Tible: Position Owner: Organization Owner: Updated:* Updated:*	Telenarlating Outbound_75, IMT 2/22/2007 04:56:2 G75_01 H-320877	Account Sin Dial Industry Dutis J Wask Pau J Time Zone Annual Revenue Contract Information Do Not Col				1 of 1

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 *Gplus* 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.

ø	ß	Ð	<b>@</b>	Þ	Ø	<u>5</u>	a	þ	ě

Figure 29: Controls for the Outbound Campaign functions





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 Gplus Adapter for Siebel CRM Deployment Guide contains detailed information about DNC administration.

5

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 Gplus 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.

Campaign Status	
# of Attempts:	1
Call Status:	Agent CallBack Eri 💌
Call Outcome:	•
Reschedule Time:	5/19/2007 04:25:1 🗮
Created:*	3/22/2007 03:23:4 🗮
Email Bounce Type:	-
Offer Name:	Campaign3_offer 📴
Treatment Name:	Campaign3_treatm 🔛

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.

iebel Call Center - Windows Internet Explorer				
• Mtp://gpvmk12/calicenter_enu/start.swe?	SWECnd=Login&SWEPL=18_sn=b24hh6CypTYtt3284Qb1goO	024knPkYuov71bgC2F09aTs8kweKgh56u824g9s2k8c5WET5=128	3774519 💙 49 🗙 Uve Search	P
Edit View Favorites Tools Help				
o help protect your security, Internet Explorer has restrict	ted this webpage from running scripts or ActiveX controls that o	could access your computer. Click here for options		
🕸 🏀 Siebel Call Center			🙆 • 🖬 - 🖶	• 🕞 Page • 🌍 Tools •
Edit View Navigate Query Tools Help Pus	sh Preview interaction from 380446547852			ORACLE
			Saved Queries:	T 😫 🤇
🛯 🕘 60 00:00 🔄 🛃 🖡	■ ● ● ● ● ● ● ● ● ● ● ● ● ● ● ● ● ● ● ●	💌 🗔 @ 🛹 📥 !	a→ 11 + 11 + 0 a	
peign:				
Home Accounts Contacts Op	portunities 📔 Quotes 🐺 Sales Orders 🤱 🗄			
the contribution of	Campaig	ans   Charts   Campaign Members   Explorer		1 1 of 1+ 🕨
ulia_validation_1 text =Query				1 10f 1+ 1
Campaign Name: " Julia_validation_1		tatus: Launched v Region: iority: v Organization: Default O	5	
Campaign Code:* 1-569849				
Type:	Planned End:* 12/31/2009 12:00:00 Al E	Group:		
Objective:	Execution Period:	Team: OUTBOUR	ND_ADM2 E	
				2
Contact_1*				) (d) 1of 1
Contact_1* Menu •     Concel Query				>
		Account Information		) (1 lof1 (5
Menu •   Carlott Query	월 Contact First Name: contact.34			) (d. 10f1 (d. 1
Menu •   Statut Query Personal Information	Contact First Name: contact_3/J Prospect First Name:			) (# 10f1 (*
Menu •     Estool Query   Personal Information Contact Last Name: Contact_1*	10100 No.000 ToT	J* Account:	J	) (i 1of1 )

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 2. To add a callback call (see Figure 33 on page 100):
  - Call
- 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.

Y_&SWETS	=1185487999801&SWE	Ho-gpsweb					~	🔁 Go	Link
								white the S	
				Quer	ies: * All Cont	acts		PP	
_	• • • a	+ de +	s∎ + 40	• 0 \$		@  <b>D</b> ]	Ø Ø Ø	₽	
dministrati	en								
							12	10+중	3 [8]
9	Ste								
			ы						
	State		-						
	Country:								
Credit Card	ts Customer Setisfact	ion Survey	Households	Invoices L	ist Vembership	Notes 0	Offers Opp	ortunities	-
							11+ 8	1-10	Ŧ
1	Routing Point	Due		Тур	e	Status	Des	cription	
	24091	7/27/200	7 01:13:51 AM	Call		Unschedule			1
1	24091	7/21/200	7 03:04:53 AM	Oth	r.	Completed	Call	back numbe	m
1	24091	7/21/200	7 02:59:41 AM	Othe	¥.	Completed	Call	back numbe	-In-
S 6	24091	7/21/2003	102 16:43 AM	Othe	£	Completed	Call	back numbe	arr.

#### 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 0FF, 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**

*Gplus* 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.

Back - 0 - 🖻	wonkes Lools Help					
	3 1 Piseast		alter in the			
tere 💽 http://gpvtr						- 🛃 Go 🛛
e Edit Vers Nava	torre Query Tools	Telp				ORACL
	H 2 E	5 1			Saved Que	riesc. 🔍 🗐 😋
(J) 00:00 17	13		10日前期3	p 🔴 ->E-mail from d	gurewc@mteti-609 🔄 🖻 🖉 🖉 🖕 🛦 +   🗊 + 📲 +	0
nesys 😭 Home		Contacts	Opportunities	🛒 Sales Orders 🕴	Service 🗟 Quotes 🕼 Administration - Product	
inbound Email				1 210	Outbound Email	
Menu • Reply	/ Reply All Mark C	Ione Contacts			Menu -	
From daurer	wyo@micr-tH009				Tec	
	eklimicz-ti-009>				Ge	
					Berz	
Cc.						
Cc Schuct Incom	ing F-mail sample				Subject:	
	ing C-mail sample				Subject: Attachnoents:	
Subject Incom	essage			2		2
Subject Incom Attachments: 디 Hil This is a test me	essage			-	Attachuseuts: 🕅	<u>2</u>
Subject Incom Abbothments: IT Hil This is a test me Have a nice day!	essage. I			-		2 North Control
Subject Incom Attachments: IT Hil This is a test me Howe a nice day! Suggestions	essage	Ribourid Attachme	nta 🛛 Outbound Atta	.⊒ ≥l	Attachuseuts: 🕅	2 
Subject Incom Attachments IT Hil This is a test me Howe a nice day! Suggestions Neru = Pr Norme	essage I Knowledge Manager terner Category Path	Description	Attachments	il structu	Attachments II	
Subject Incom Attachments IT Hil This is a test me Howe a nice day! Suggestions Menu + Pr Norme > Test	essage. I Knowledge Manger review Category Patk sebel(cat	Description 2	Attachments 11	II I	Attachments: IT	
Subject Incom Attachments IT Hil This is a test me Howe a nice day! Suggestions Neru + Pr Norme	essage I Knowledge Manager terner Category Path	Description	Attachments	I I structu	Attachments II	

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.

File Edit View Navigate Qu	ery Toole Help					
🍜 🛅 🤀   🛥   H	22 🖆 🛛 🐃 📓				Saved Queries	1
🚰 🕘 00:03:20	🖂 🗠 è è 🖾	웹 삶 줴 浩 🗶 🖝 Outbound	iemai:0001Sa4PWB6000V	💽 🔍 🗶 । 📥 । 😹 । 🗐 । 🗐 ।	0	200 @ P
Home 🛅 Accounts	🚹 Contacts 📴 Opportuniti	es 🛒 Sales Orders 🤱 Servi	ice 📔 Quotes 😭 Admin			
Tel anna d'Enna R				Interactions   Workitern		
Inbound Email Nenu  Reply Reply		No Records		Outbound Email		
Nenu •   Neper Neper				Menu • ABook Contacts		
Fram				To: anastasia.volkova@genesyslab.co		
то				Ec: olexit/@genesydab.com		
Ce .				Bot: qagplus30@ganasyslab.com		
Subject				Subject: Attachments:		
Attachments: 🗐						-
		A.				
						-
				Send Check Spelling	Save & Close	Delete
	ige Neneger Inbound Attachments	Outbound Attachments				
Menu - Presino						
Name Catego	ry Path Description	Attachments		Active		

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.

🛅 🎯 🛛 🚣 🗍 🕅	2 🖬 🕒	3		N				Saved Queries:	1	Ŧ
(B) 00:08:04		▶ ▲   数 数 4	お新先しの	Contround email 0001 Sa4PLUBG	aaau 🔜 🖾 👁 🛹 👍 🕨	411111			ຈ ຈ ອ ອ ,	A
							1010-0-	pr or pr jun		
Home 🛅 Accounts	🔢 Contacts 🌗	Opportunities	🛒 Sales Orders	🔒 Service 📔 Quotes 🕍	Administration - Product Gene	sys				
					Interactions	WorkDare				
nbound Email			No F	hecords -	Outbound Email					
lenu 🕶 🕴 Reply Repl					Menu * ABook	Contacts				
Fran					Ter superior	genesyslab.com				
					Ec:	ferestorer con				
To										_
	🔁 Address Book - i	Nicrosoft Interne	at Explorer							X
Subject	Query				Find Fint Name	💌 starting with	Class Required>	Find	1 - 10 of 11+	
ittachmentsi 🥅	IsTo	ISC	ISBCC	First Name	Last Name	Email Address	Job Title	Status	Employee Flag	
				AAA	лал.	444		Adlive	N	
				Anastasia. Vokova@genenyslab.com	Anastasia. Volkova@generyslab.com	anastasia volkova@		Addres	N	-
				kilisk.	Dw	@rtth		Addres	N	
				L	н	VERVER		Addres	N	
				Lar	н			Active	N	
				International	HH	reagui		Addres	N	
				LAR	LAR.	lar		Adive	N	-
				Alexey QAGPlus3049genesystab.com	Lishchinsky QAGPlus30@genesyslab.com	olexiyl@genesyslab. gagplus30@genesys		Adive Adive	N	
				Evgeniy	Shith	evgeniv@genesvsla		Adive	N	÷
Suggestions Inc.	1			erwart.	2000	cryster and story and		- AND		
Preview 1									Add Close	

Figure 41: New Outbound Contact in Address Book

Address BookThe 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<br/>fields IsTo:, IsCC:, and IsBCC:. Click Add to submit the changes. See<br/>Figure 42 on page 107.

Image: Constraint of the second se	]œ,≚,	두 🛃 원 왕		>Outbound ernail 1001 Sa 4PUJB0 2. Service 🚡 Quotex 💰		> <b>7</b> *> 4∐>4≣> ⊗ ≊		199 ៦	÷
Home 📴 Accounts 📴 C									_
bound Email	ontacts 📴	Opportunities 👿	Sales Orders	🧏 Service 📔 Quotes 🔮	Administration Rendert Co				
					Administration - Product Ge	maraya			
					Interaction	ns   Workiten			
enu •     Ruply   Ruply Al   N			No Re	cor ds	Outbound Email				
					Neru • Abask	Contacts			
Fran					Ter				
					CC:				
To					EL:				
Ci Stade	are Back Aller	rosoft Internet Exp	loses						
200(60)						starting with Case Required		L - 10 of 10+	<b>-</b>
tadments Query	IsTe	IsCC	IsRCC Fire	st Name	Find FirstName	Email Address Job Title			
	1510	ISC	LSBUL PRI		AAA	Email Address Job Tibe	Adizes	Employee Flag	-
7 N	Y				nnon Amerikania Nolkova@qamanyalab.com		Active	N	
		N	N 444	- / /	Dvi	(this)	Adive	N	
N N L			н	MINIE	Active	N	·		
N N N	N	N	N Lar		н	1	Adhe	N	
	N	N	N sea	luge	HH	seegul	Adive	N	
	N	N	N LAP	e	LAR.	lar.	Active	N	
		Y	Ale	soav.	Lishchinsky	olexiyli@genesyslab.	Adive	N	
			Y QA	KPlus30@genesyslab.com	QA GPlus30@generyslab.com	qagolu:30@ganeeyi	Adhe	N	
Suggestions No	N	N	N ald	J.	ald	ald	Active	N	*
nu • Prasto									
Namar Calt								Add Cose	

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.

Pie to gene Provete bolk gele   Pie to gene Provete Bolk gele Pie to gene Provete Bolk gele Pie to gene Provete Bolk gele Pie to gene Provete Bolk gele Pie to gene Provete Bolk gele Pie to gene Provete Bolk gele Pie to gene Provete Bolk gele Pie to gene Provete Bolk gele Pie to gene Provete Bolk gele Pie to gene Provete Bolk gele	Siebel Call Center - Microsoft Internet Diplorer			
Addemain Intro-//gover/ local lobal   If is Given Intro-//gover/ local lobal   If is gover/ local local Intro-//gover/ local local	Ble Edit Yess Pavorites Iools Help			
At Cold view Nangen Query 1005 1950     Seried Queries     Seried Queries     Conserver     Accounts     Contracts     Provide     Accounts     Contracts     Contracts <th></th> <th>• • • • • • • • • • • • • • •</th> <th></th> <th></th>		• • • • • • • • • • • • • • •		
Signed all       Service       Service <th>Addimen 💽 http://gpvm1:8080/start.com</th> <th></th> <th></th> <th>🛨 🛃 Go 🛛 Linia</th>	Addimen 💽 http://gpvm1:8080/start.com			🛨 🛃 Go 🛛 Linia
Image: Sector Secto	File Edit View Navigane Query Tools Help			ORACLE
Generys Manual Constants   Workshow   Table oblights - House   Merus -   Merus -   Ministration - Product   Model - End - Ministration - Product   Sector				Saved Queries: 👻 😋 🛛
Decision       Dubboard Enail         Meru *       Meru *         Frien Guzersyc@mcc4000       Tic data         Tic sol coblinics-thcoding       Tic data         Skielet Incorang E-mail sample       Mitachments:         Mitachment Num       Size (En Bytes)         Neme *       Nem *         Nem *       Nem *         Nem *       Nem *         Nem *       Youfded         Mater       Mater         Nem *       Nem *         Nem *       Youfded         Mater       Nem *         Nem *       Youfdeds         Mater       Youfded         Mater       Youfded         Mater       Youfded         Mater       Youfded         Mater       Youfded         Mater       Youfded         Youfded       Youfded         Mater       Youfded         Youfded       Youfded         Youfded       Youfded         Mater       Youfded         Mater       Youfded         Youfded       Youfded         Youfded       Youfded	📕 (B) 00.00.20 🗍 🛅 I 📥 I	1111日日日日	🕹 🗶 🔤 Rept	00026433KDD10013 _ © ●   ♪   由 + 由 +   須 + 如 +   ⊘
Meru       Meru       Aboxi       Corracts         From dgureryoBitiz.cH009       Is shi eshikhricH008       C       C         G       Subject. Incoming E-mell sample       Subject. RELincoming E-mell sample       Attachments II         Hil       This is a feat message.       From dgureryoEmst-cH009]       Serie Lincoming E-mell sample         Hue a nice day!       Image: Source day       Dubound Attachments       Image: Source day       Source day         Suggestore I: Innercoge Marcage: Indourd Attachments       Image: Source day       Source day       Source day       Source day         Marca * Name: Size (In Bytes) Type       Modified       Updake File: Comments       Image: Source day       Source for the comments		ts 📴 Opportunities	🗐 🗐 Sales De	ers 🧏 Service 📓 Quotes 🎉 Administration - Product
From dgarevys@ndc.etdo09       To: dgarevys@ndc.etdo09         G:       Subject: Fit Uncoming E-mail sample         Attachments: []      Original Message         Hif      Original Message         This is a steat message.      Original Message         How a nice day!      Original Message         Sogettors: InconfidgeMarage       InconfidgeMarage         Subject: Inconfing E-mail sample	Inbound Email			Outbound Email
To all oblighters 45003   Cc   Subject incoming E-mail sample   Attachments:     Hil   This is a steat message   How a nice day!     Subject incoming E-mail sample   How a nice day!     Subject incoming E-mail sample   Hil   This is a steat message   How a nice day!     Subject incoming E-mail sample   Hil   This is a feat message   How a nice day!     Subject incoming E-mail sample   Hil   This is a feat message   Subject incoming E-mail sample   Hil   This is a feat message   Subject incoming E-mail sample   Hil   This is a feat message   Stackheent Nam   Subject Incoming E-mail sample   Hil   This is a feat message   Stackheent Nam   Subject Incoming E-mail sample   Hil   This is a feat message   Stackheent Nam   Stackheent Nam   Stack (In Bytes) Type	Meru - I Control Control Control			Menu • Allcon Contacts
Hil This is a test message Hove a nice day! Hove a nice day! H	To add exhibitive-H-009> Cc Subject Incoming E-mell sample			Cx: Bott Subject: PE Uncoming E-roal sample
Suggestions         InnovindgeManager         Indound Attachments         Outbound Attachments           Manu +         New         Carey         New File         1-1 of 1           Attachment Nami         Size (In Bytes)         Type         Modified         Update File         Comments	This is a test message		-	From dgurevyc [mailto dgurevyc@mtx-8-009] Sem05/07/2007 13:38 12 To sbi SubjectIncoming E-mail sample
Meng * New Coary New File 1-1 of 1 💬 Attachment Nam Size (In Bytes) Type Modified Update File Comments			2	Send Check-Spelling Severts Close Deleta
		chinents   Dutbound Att	tachments	1-1#1 🛱
	Attachment Nam Size (In Bytes) Type	Modified	Update File	Comments
> GerCome 265 GP 5/7/2007 3:41:07 # ✓	SignComm 265 GP	5/7/2007 3:41:07 A	~	
	•			Trusted sites

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.

	Name	Value 🚔
>	BackGroundEmail	BackGroundEmail
>	Inbox	Inbor
>	Order	Order
>	Outbox	Outbox
>	Draft	Workbin for Original Agent
		OK Cano

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.

d\$	Back • 🕜 - 💽 😫 ress 🛃 http://gpvm1:608	and the state of t	
	e - Edit - View - Navigate	and the second second	
E		N 김 티 ] 코 B	
	00:00 00	「「「」」	▲周田が開発● ● ● ● ● ● ● ● ● ● ● ● ● ● ● ● ● ● ●
1	nteraction List	Menu   Query Op	ben -
I	send substantial and the	any statement of the desired of the web	
1	From To	Interaction Date	Subject
	From To dgurevyc@mbx-8-009	Interaction Date 4/19/2007 8:04:24 AM	Subject PE:444444444
	From To	Interaction Date	Subject
	From To dgurevyc@mbx-8-009	Interaction Date 4/19/2007 8:04:24 AM	Subject PE:444444444
	From To dgurevyc@mbx-8-009	Interaction Date 4/19/2007 8:04:24 AM	Subject PE:444444444

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 *Gplus* 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 Gplus Siebel Multimedia chat client.

#### Start of procedure

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

MCR Samples 7.1.	Chat - Microsoft Inter	net Explorer			
<u>File E</u> dit <u>V</u> iew F <u>a</u> vo	orites <u>T</u> ools <u>H</u> elp				
🚱 Back 🔹 🐑 🕤	💌 🖻 🏠 🔎 s	earch 🤺 Favorites	🥴 🔗 🍓 🗵	2 • 🔜 ل 🖓	» Links
Address 🙆 http://gps:88	388/WebAPISamples71/Chat	/HtmlChatFrameSet.jsp	)		💌 🔁 Go
		Chat s	ervice		
Personal informa	ition:				ANRIAN C
First name:	John		Last name:	Smith	
E-mail address:	a@a.com	a start	Subject:	Inquire	6369
FRANKLER	Charles A. Charles	Start chat	Stop chat	PROTECT P	Carta Art
Welcome to Gen	has joined the s			Send	
imossage.	deteriories dete	the state	Dady of Charles		
	ANT N	ANTAY	WILLAW	E AN	
3					Local intranet

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).

le fat yeer fyrotes [ook geb ] Back - 이 · 이 의 이 이 · Forestes 은   · · · · · · · · · · · · · · · · · ·	Saved Queries:
Senar Call Inter/Appendin0000/start.com Ne Edit Vene Venyune Query Tools (sep Ebilit respuiled From all accom Call Call And And Call Call Call Call Call	Saved Queries:
le Ede Ven Mangare Quera Tools (help ) Elled menjanet from ell'accom 各位的(近)并立名(古金)	Saved Queries:
FOR Y DE F	Saved Queries:
	· · · · ·
nnesys 😭 Home 🎦 Accounts 📴 Contacts 👫 Opportunities 🐺 Sales Orders 🔮 Service 🗟 Quotes 🌸 Administration - Product	1.242
From To Interaction Date Subject	102.82
dguseryc@ntx=8-008 9/19/2007 @09:24 MM RE-144444444	
dgurevyc@indx+H003 5/7/20071;26:28:AM RE:Incoming E-mail sample	

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).

							1000
							4
2. 14 174	1						
_						🛫 🚺 Go	Links
					), j	ORA	CLE
				Saved Queries:		<b>#</b> ]	C. 0
8 品格	5 % @ L+Chatre	no: e@e.mot/sege	- C	0 - 11 - 11			
Opportuniti	ies 🗐 Sales Gede	rs 🤱 Service 🔒 Qu	ates 👍 Administration - Product	<b>6</b>			
		न न म					
	Check Spelling Ser	의 4					
-	Menu • Prev	iew Apply				1-3073	
	Response	Description	Type	Active	Attachments		
	121111						_
_	2.000	and the second	Photosoft and a confident of the book of the				
-	da en arcana						
	9 상 8	Deck Spoling in Menu * Prov Response Transe at	Ded Solling Send	Image: Check Speaking       Service:       Service	Saved Querries:	Service         Service       Service         Service       Service         Outcome       Service         Outcome       Service         Deck Spalary       Service         Memory       Preservice         Memory       Service         Memory       Service         Memory       Service         Memory       Service         Memory       Service         Memory       Service         Memory       Preservice         Memory       Preservice	Saved Quartice

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.

74e Edit View Navigate Query Tools Help 2710 😜 🛯 📾 📄 🔊 🖬 🖆 📕 😁 📊					RACLE
219 e   m   A 🛛 🖞   = O 🗤					
		Sar	ved Queries:		E AA
🔟 🔁 00:00:0-20	* * 📴 🚚 🖓 🖓 🕷 👘 🎯 💀	Chat request from a@a.com	<b>x</b> 🗉 👂	1 + 1 to > to >	· [0] > # >
Home 🔤 Accounts 🔢 Contacts Administ	ration - Product 🛛 🐻 Opportunities 🗍	Quotes   Fleet Management	Genesys V		
Chat		(			1
Menu      Leave Chat   Mark Done					
(00:38:17) aar Hekol					
aa ti typing		1			
	10 A				
F Send Transcript	Check Speling Send				
Knowledge Manager					
E Categories	Menu  Preview Apply	Type Activ		Attachments	-10f1
Categories	Response Description	Type         Activ           StandardResponse         Y	e -	N	

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.

	Microsoft Interne					6	
	vorkes Joole He						
	B ( PSeas	th 👘 Favarkes 🦿	ALC: NO DA				
ne 💽 http://gpvn	hi (8060/start, sven					2 🖸 Go 🛛	
Edit Versi Auro	gine Query Tools	11th [06:37:1	2] JohnSi How are Yo	P			
10 m	H J J J	101			Saved Queries:	1 C	
(1) 02:37:35	12	51 A + A	10日日日本	@ -Reply 0002643	31KD1060W		
HI CONTRACT	1.5						
esys 2 Home		Contacts	opportunities	🖉 Sales Orders 🏻 🗐	, Service 📓 Quotes 👔 Administration - Product		
bound Email				1.1.1.1.1	Outbound Email	-10	
enu =					Menu = ABook Contacts		
From dates	vyo@merctHo09				Tec: dpurwero@stx-0-009		
	skilowicz-H-009>				Ce:		
Cc Cc	Stander Honger				Bect		
	and the second				Subject: REtIncoming E-mail sample		
	Subject Incoming E-mail sample Internets, TT				Attachments: 17		
asoments: 10						-	
Hil				-	Original Message		
This is a test me	essage.				From digurevyc [mailto digurevyc@mtrc-tl-009]		
Have a nice day!	6				Sent 05/07/2007 13:23:21		
nave a nice day					To abl Subject Incoming E-mail sample		
					coolicit meterinde to man sample.		
					Hil This is a test message	-	
					This is a test message.	-	
				1	Send Check Spelling Save & Clos	e Geleka	
		. I see the second	ents Outbound Attach				
	Knowledge Manage terview Apply	W Shownd Attachme	ents   Outbound Attach	menca -		1-10/3	
hame	Category Path	Description	Attachments		Active		
Test	sebel/cat1	some SR sample	п		u .		
	sebel/cati	srä very lonh descrit	( <b>9</b> )		Ŷ		
sri		not approved	N		N°		

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

## **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).

iebel Call Center - Microsoft Internet Explorer		66		
Edit View Figvorites Iooli Help				
Back • 🔿 - 🖻 🔹 👫 🖉 Search 🔥 Forwarkes 🕐 🗇 - 🖓 📅				
www. 📲 http://gpvmli8080/start.sve	20	Go La		
e Edit Verei Navagane Quera Tools Help	OR.	ACL		
B0 & B2 B B	Saved Queries:	F (3		
(1) 02.25.05 [집) 本·孟勤登訴罪者 @Reply00026a334	KED1000V 🔄 🔍 🐢 👍 + 🞪 + 🚮 + 🔞 + 🙆			
Transfer interaction to another execut				
nesys 😭 Nome 🛄 Accounts 🔠 Contacts 📴 opportunities 🔐 Journations 👔	Service 📓 Quotes 🎼 Administration - Product			
eractions   Worklawn				
nbound Email	Outbound Email			
	Menu      ABcoli Contacts			
From diguneryso@mbr-tH009	Tet: dpurweyo@wtx-8-009			
Ta abl «ablikes»41-009>	C:			
¢	Boo Subject: REUncoming E-mail sample			
Subject. Incoming E-mail sample	Attachments:			
Attachments: 🔟				
3	8100100			
Hil This is a test message	Original Message From: dgurevyc (mailto:dgurevyc@mtr.d=009)			
	Sent 05/07/2007 13:23:21			
Have a nice day!	Toubl			
	SubjectIncoming E-mail sample			
	HI			
	This is a test message.			
*	Send Check Spelling Save & Close Delete			
	and other sheet a			
Suggestions Enoviedge Manager Tribound Attachments Outbound Attachments		ALC: NO.		
Menu - Prevnew Apply	1.1	#= 1		
Name Category Path Description Attachments Test sebel/or:1 some R sample //	Active 1/			
resc sebel/cati some av sampe n sri sebel/cati uri weytenh desch Y		_		
R not approved substituation of approved N	- N 7			

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.

	EIDIÓ AC	tive Configuration 💌 starting	g evitin	Find Provinces 1 - 20013 New
Active Configuration	Agent	Agent Login 🗐	First Name	Last Name
Genesys Configuration	DEVO	a_1001	dev0	dev0
Transfer To Queue				OK Cancel

Figure 53: Transferring an Interaction to an Agent

htt	p://gpvm1:8080 - Choose a Queue to transfer to - Microsoft Internet Explorer	X
		Previous: 1 - 10 37 10+
	Queue	
>	Inbound e-mails1	
>	E-mails send error1	
>	E-Inalis for processing by agents1	
3	Preprocessing Failure	
>	Queue for inbound collaboration reply processing	
>	Redrect e-mail failure1	
>	E-mails for QA review1	
>	E-mail distribution/Queue	
>	Inbound e-mail postprocessing3	
>	Preprocessing Failure 1	
Tra	ansfer To Agent	OK Cancel
Dor	NR.	O Trusted sites

Figure 54: Transferring an Interaction to a Queue

#### End of procedure

#### Next 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).

8	📕 🕞 🗔 🏂 💷 💿 ->c	hat requ
tion - P	Transfer interaction to another ag	ent

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).

		Active Configuration			ind   Previous 1-1 of 1 Nex		
	Active Configuration 👄	Agent 🚔	Agent Login 🚔	First Name 🚔	Last Name 🚭		
>	Gplus801cc76	SAG2 Sag2	Sag2	Sag2	Sag2		
					OK Cancel		

#### Figure 56: Transferring an Interaction to an Agent applet

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

#### End of procedure

#### Next 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).

8 🖪	<b>]</b> d d %	=   •	->Chat requ
tion - Prod	Transfer Inter	action to Q	ueue Quote

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).

	Previous 1 - 10 of 10 + Ne
	Queue 🚔
>	Termination failure
>	Termination failure 1
>	Workbin for Original Agent/Queue
≻	Queue for inbound collaboration reply processing
>	Quality control2
>	Queue for responses
≻:	Queue for inbound email postprocessing
≻	Preprocessing failure 1
×	Preprocessing failure
>	QA review required

#### Figure 58: Transferring an Interaction to a Queue applet

2. Choose a queue you wish to transfer to.

#### End of procedure

#### Next 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.

🖉 http://gpvr	m1:8080 - Standard Response Preview - Microsoft Internet Explorer	
Name:	sr1	
Category Path:	siebel/cat1	
Description:	sr1 very long description to check a column display behaviour	
Attachments:	Sample.jpg	
Hello!!! dg	urevyc	<u></u>
This is a H	TML SR	
HTML cod	e inside body sample: 111 &aaa	
		Ŧ
		Apply Cancel
j Company seript:vo	id(0)	isted sites

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.

🗿 Siebel Call Center - Microsoft Internet Explorer	_ B _
Eile Edit View Favorites Iools Help	
🔇 Back 🔹 🕤 👻 😰 🏠 🔎 Search 👷 Favorites  🚱 😓 🕞	
Address 💩 http://gpvm1:8080/start.swe	💌 🔁 Go 🛛 Links 🎽
File Edit View Navigate Query Tools Help	ORACLE
B C 0 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	Saved Queries: 💌 😋 🍕
😫 😉 00:11:44 🔄 🐴 ト 📥 🖏 計 参 裕 巻 🔍 ->Reply:00026a33KDD100	ov 🔽 🔍 👁 🖙 👍 > 📥 > 🖪 > 🧐 > 🖉
Genesys         Home         Accounts         Contacts         Poportunities         Sales Orders         Service           Interactions         WorkItem	Quotes 🔗 Administration - Product
Inbound Email	Outbound Email
Menu 🕶 📔 Reply All Mark Done 📔 Contacts	Menu 🔻 ABook Contacts
From dqurevyc@mtx-tl-009	To: dgurevyc@mtx-ti-009
To sbl <sbl@mtx-tl-009></sbl@mtx-tl-009>	Cc
Cc	Bcc:
Subject Incoming E-mail sample	Subject: RE:Incoming E-mail sample
Attachments:	Attachments: 🗹
	<b>▲</b>
Hi	Original Message
This is a test message.	From: dgurevyc [mailto:dgurevyc@mtx-tl-009] Sent:05/07/2007 13:23:21
Have a nice day!	To:sbl
	SubjectIncoming E-mail sample
	на
	This is a test message.
	<u> </u>
<u>×</u>	Send Check Spelling Save & Close Delete
Suggestions Knowledge Manager Inbound Attachments Outbound Attachments	
Menu  Preview Apply	1-3 of 3
Name Category Path Description Attachments	Active
Test siebel/cat1 some SR sample N	N
sr1         siebel/cat1         sr1 very lonh descrip         Y	Ŷ
SR not approved siebel/cat1 not approved N	N
1	► 0 of 0
Done	Trusted sites

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 Magnet Sign Off button (see Figure 63).Media TypesTo 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.

is Edit View Navigata Query Toola Halb					ORACL
[[			5	Saved Queries: *0rbox	E 9
🕘 00 00 10 🚺 🕹 + 🛓	·西部新居宅 ·Stehe	Email from devgolus 29@ganesysta 💽 🚳 🚳 🕴	- 4-2	1 1	
Home Genesys Dia Contacts Re Oppor	rtunities 🔤 Sales Orders 🔮	Service 🕍 Quotes 🛃 Administration	- Product	Accounts	
al   Chat   Steractors   Worklitern					
Incoming Message 👘 🖬 🕬 🕫 🚺	Outgoing Message				
Manu * Cuery	Neru · Reply Reply 1	p All Forward			
Prom: devgpk.s29@genesyslab.com	From:			SR.#:	24
Subject: Sebel eMail TEST	To		03	Opportunity:	121 54
Stephen (State and Inter	Cc	Bot		Contact:	ы ы
Sabel #Mail TEST	Subject			Accounts	لك الأ
Sabel email (ES)	Categories			Greeting:	10
	Body	w		Closing:	and the second s
×1					
ncoming Attachments 1-1013 enu • Query Name Type Size Organi Histopi tot. 850					*
A TRACTACIÓN CONTRACTACIÓN DE CONTRACTACI	Attachments			alst	
				1.11	
lone					Local ntranet
				Press I	Contraction of the later.

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

File Edit View Naviga	te Query Tools Hel	P						
🔁 🛱 🎯 🗍 🎟 🗍	🔎 🛛 🖻 🗍 🖷	🕒 📊				Saved Queries: *In	nbox	
00:00:0	-21	🖬 > 🛎 > 🏦 📘	302%	O ->SiebelEmai	l from		⇒   <u>a</u> b ≻ <u>ab</u> ≻	
ommunication:								
👌 Home 📔 Accou	ints 📙 Contacts	Administration - Pr	oduct 🐻 Opport	unities 📋 Quotes	Fleet Management	Communications	-	
Communicatio	ns List   My Template	s   My Profiles   My Ou	utbound Requests   M	/ Outbound Request Over	view   My Qualified Work	Items   Web Collabora	ation List   My Comm	unications - Re
Communications	Menu 🕶 🛛 Qu	ery Reply Reply	to All Forward Re				1 -	10 of 10+
Activity #	Attachment	Status	From	Last Name	First Name	Subject	SR #	Орро
> 1-WE54		Not Started	dmytro.gurevych@	gene dmytro.gurevych@o	gene dmytro.gurevych@ge	ne test siebel email		
1-536C		Done	dmytro.gurevych@	gene dmytro.gurevych@q	gene dmytro.gurevych@ge	ne test401		
1-5J44		Done	dmytro.gurevych@	gene dmytro.gurevych@(	gene dmytro.gurevych@ge	ne test400		
1-NKSO	0	Not Started	dmytro.gurevych@	gene dmytro.gurevych@o	gene dmytro.gurevych@ge	ne test310		
1-N4NK	0	Done	dmytro.gurevych@	gene dmytro.gurevych@(	gene dmytro.gurevych@ge	ne test304		
1-N4LC	Q	Done	dmytro.gurevych@	gene dmytro.gurevych@o	gene dmytro.gurevych@ge	ne test303		
1-KN34		Not Started	dmytro.gurevych@	gene dmytro.gurevych@g	gene dmytro.gurevych@ge	ne 240		
1-K294		Done	dmytro.gurevych@	gene dmytro.gurevych@(	gene dmytro.gurevych@ge	ne 239		
1-JOD4		Done	dmytro.gurevych@	gene dmytro.gurevych@(	gene dmytro.gurevych@ge	ne 238		
1-IY4O		In Progress	dmytro.gurevych@	gene dmytro.gurevych@g	gene dmytro.gurevych@ge	ne 237		
				1				and the second second

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.

	Doom theb		
3 Back 👻 💬 – 💌 🛃	🏠 🔎 Search 😭 Favorites 🥑 🔝	• 🔆 🖩 • 🗾	
ddress 📹 http://gpv/m3/cało	enter_enu/start.swe?SWECmd=Logn85WEPL	=18_sn=239xtWinkBQYmQ4-DmR5X.hoY8NC2Gcv407tr20	wvu 🔹 🔂 Go Links
File Edit View Navigate Q.	ery Tools Help		ORACLE
2 in 0 2 11	2 2 3	Saved Quaries:	e u 6
a la mora	「「「」、「「「「」」のできょう。	5 0	「山い山」ない
Homo Genesys III Co	antacts 📙 Opportunities 📝 Sales Orde	rs 🔮 Service 📓 Quotes 🛃 Administration - Prod	uct 🔁 Accounts
Interactions   Woriztum	Normalia de la construcción de la c		WWW. I HANNINGS
			221022501
Interaction List	enu • Query Open		1-3663.1
From To	Interaction Date	Subject	
test	5/8/2007 06:02:17 PM	(no subject)	
> eMail test	5/9/2007 01:02:34 PM	(no subject)	
User	5/11/2007 04:09:13 PM	Siebel Siebel ethal TEST	
(cia	# 1634		

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**

## **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 Gplus Adapter for Siebel CRM Deployment Guide.

**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**

**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.

## 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, page 129
- Logging In to the Siebel Server as an Administrator, page 130
- Accessing the Administration-Communications Functions, page 130
- Creating a Genesys Configuration, page 131
- Adding Agents to the Genesys Profile, page 134
- Editing the Agent Information, page 136
- Configuration Synchronization Enhancement, page 149
- Genesys Agent's Employee ID Mapping, page 151
- E-Mail Routing, page 152
- Synchronization of E-mail Content Between Genesys Universal Contact Server and Siebel, page 153
- Genesys E-Mail Activity Creation, page 153
- Genesys Chat Activity Creation, page 154
- Starting the Configuration Synchronization Component, page 156
- Starting the Campaign Synchronization Component, page 158
- Regular and Compatibility Modes, page 166

## **Features for Administrators**

This section describes the major features to help administrators manage the *Gplus* 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.

	nter - Microso		-	t								- 0
le Edik Yiev	v Favorites	Icols Help	>									
Back • 🔿	- 🖹 🗈 🐔	Search	n 📩 Far	vorites 🕑 🕻	a• 💩	2						
dress 💰 http	//gpvm4/callceni	ter_enu/star	t.swe?5W	ECmd=Login85%	VEPL=18_	sn=tOEY8wfkG	SvSnnagyh-7Qx1	NylOh4931pa7mT	36HzgY_85WETS=118471147523	85WEHo=gpvm4 💌	) Go	Links
ile Edit Viev	Navigate Q	uery Tools	Help							O	RAC	ELE
6 6 8	🍝 🔥	2 2	四	3					Saved Queries:		-	0 0
me:	- 1 33		,									
Home	Accounts	BE Conta	octs 🔒	p Opportuniti	ies 🛒	Sales Order	Servic	e 📔 Quotes	🖌 🛃 Administration - Prod	uct		
	inistration		unicati	ons								
	nt General Profile CD Queues											
	onfigurations											
	lesets											
	ctive Agent State tive Items	15										
	hannel Status											
	hannel Items											
	ommand Data											
	ommand Data Pa ommands	rameters										
	ommands											
	ommand Data Pa	rameters										
	ommand Paramet	ers										
	bcommands onfigurations											
	onngurations gents											
	ommands											
* EV	ent Handlers											
	arameters											
	ofiles vent Handlers											
	sociated Event L	005										
	ent Handler Pari											
	vent Response Pi	arameters										
	vent Logs	1000										
	vent Log Paramet vent Responses	ers										
	vent Responses											
- At	sociated Event L	.095										
	ent Handlers											
	vent Response Pr utbound Reques											
	ommunication Sul											
• All R	esponse Groups											
• All R	esponse Groups put Arguments											D 0

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 *Gplus* 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.

Edit yew			Explorer						-10
	w Favorites								
Back + 🕥 ·	- 💽 🖹 ổ	Search	h 👷 Favorite	• • • • • • • •					
ess 🔬 http:	://gpvm4/callce	nter_enu/star	t.swe?SWECm	Login&SWEPL=18_sn=tOEYBwfk	GGvSnnagyh-7QxVNylOh4931pa7mT36	6HzgY_85WETS=116	471147523485WEHc=gpvm4	💌 🔁 Go	Link
e Edit View	w Navigate C	uery Tools	Help					ORA	
<b>D</b>	× 1	2 2	5			Saved (	Jueries:		Ct I
figuration:			-						
Home 🚺	Accounts	E Cont	acts 🌗 O	portunities 🐺 Sales Orde	rs 🧏 Service 📔 Quotes	Administration	- Communications 🛛 🗸		
					lates   Agent General Profile   All Ad			All Commands	
onfigurat	tions   Me	nu •• 1	New Delete	Query		t - 7 of 7	Import Configuration Expo	rt Configuration	P
Name 5			Con	ments					
Genesys Con	nfiguration		Voic	e collaboration					
CTI Test									
Multichannel	configuration A		Voic	e, email, and web collaboration					-
New									
Reception co	onfiguration A		Voic	K					
gs_outb75									
gsg_VCB									
	eters Profile	s Agents	Commands	Event Handlers					
Parame		La Contra						No Records	CONTRACT.
Parame Menu •	New	Query							Γ <del>Γ</del> Ι

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 0K.

The Genesys Universal Profile\_8000008 profile appears under the Profiles tab of the Configurations window (see Figure 71 on page 134).

Query	Find Name	Starting with	<case required=""></case>	Go 1 - 10 of 27	
Name $ riangle$		Driver	Organizat	ion	
Email driver for San Mateo		User-interactive Email	Default Org	anization	
Gplus OpenMedia		Gplus_OpenMedia	Default Org	anization	
Gplus OpenMedia 7500042		Gplus_OpenMedia_7500042	Default Org	anization	
Gplus OpenMedia 7500050		Gplus_OpenMedia 7500050	Default Org	anization	
Gplus OpenMedia validation	181	Gplus_OpenMedia_validation 81	Default Org	anization	
Gplus OpenMedia validation	811	Gplus_OpenMedia_validation_811	Default Org	anization	
Gplus OpenMedia validation	n julia	Gplus_OpenMedia_validation_julia	Default Org	anization	
Gplus Uni_80_vm		Gplus_Uni_80_vm	Default Org	anization	
Gplus Universal Profile_800	0008	Gplus_Universal_8000008	þefault Org	janization	
Gplus Universal Profile_800	0009	Gplus_Universal_8000009	Default Org	janization	

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

le Edit View Navigate Query T	ools Help		C	RACL
) 🔏 🛛 🗛 🗹 🛣 🗍	📇 📓		Saved Queries:	<b>–</b> 🔇
🖸 🕿 🕒 00:00:00	ⓑ ▲ ▲ ▲ 월 월 초 월	í % 🗶	○ ○ ○ ○ ○ ○ ○ ○ ○ ○ ○ ○ ○ ○ ○ ○ ○ ○ ○	5 (s) (s)
nfiguration:				
Home <u> Accounts</u> 🔠 C	ontacts 🚦 Opportunities 📄 Quotes	🛒 Sales Orders 🛛 😤 Service 🛛	Administration - Communications	
at Language Mapping   Chat Paramet	er and Routing Administration View   Communication	ns Drivers and Profiles   All Configuratio	ns   All Response Groups   All Templates   Agent General Profile   All Active Agent Status   All	Telesets 💌
Configurations   Menu -	New Delete Query		8 - 17 of 17 Import Configuration Export Confi	guration 主
Name 🛆	Comments			
VM_80_Uni				*
Validation_81_blend_1	Julia			^
Validation_81_configsynch	Julia			
Validation_81_outbound	Julia			
Validation_81_voice_G3real	Julia			
ol_8.0.000.09	ologvyna			
so_1_8.0.000.04				
so_75_outbound				
so_8.0.000.08				<b>∽</b> ∓
so_8.0.000.09				¥
Parameters Profiles Agen	ts Commands Event Handlers			
Menu 🕶 New Delete Que	ry		1-	1 of 1   🖪
Profile 🛆	Driver	Organization		
> Gplus Universal Profile_8000008	Gplus_Universal_8000008	Default Organization		

Figure 71: The Newly Created Genesys Profile and Gplus 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).

e Edit View Navigate Qu	iery Tools Help				ORACL
🛛 🖌 🕅 🖬 🖉	8 🛛 📇 📓			Saved Querie	25: 🔍 🏹
N 🕿 🕒 00:00:00		118333330	•		<u></u>
figuration:					
Home <u> Accounts</u>	🔠 Contacts 🚹 Opport	unities 📔 Quotes 🛒 Sale	es Orders 🔒 Service 🛛 A	ministration - Communications	
t Language Mapping   Chat P	arameter and Routing Administra	tion View   Communications Drivers a	nd Profiles   All Configuration	s   All Response Groups   All Templates   Agent General Profile	All Active Agent Status   All Telesets 💌
onfigurations   Men	u▼ New Delete Que	ery		8 - 17 of 17   Impo	rt Configuration Export Configuration 🗈
Name 🛆	Commen	ts			
VM_80_Uni					1
Validation_81_blend_1	Julia				<u> </u>
Validation_81_configsynch	Julia				
Validation_81_outbound	Julia				
Validation_81_voice_G3real	Julia				
ol_8.0.000.09	ologvyna				
so_1_8.0.000.04					
so_75_outbound					
so_8.0.000.08					
so_8.0.000.09					3
Parameters Profiles	Agents Commands Event	Handlers			
Menu 🕶 🛛 New Delete	Query			1	- 2 of 2   Add by Responsibilities 🗈
Agent	Last Name	First Name	Agent Login	Password	
OUTBOUND_AGENT1	outbound_agent1	outbound_agent1	OUTBOUND_AGENT1		
	outbound_agent2	outbound_agent2	OUTBOUND_AGENT2		

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).

Query		Find Agent	[	<ul> <li>Starting with</li> </ul>	<case required=""></case>	Go 12 -	21 of 21	
Agent	Last Name	First Name	Agent Login	Password	Primary Position	Primary Organization		
SAG1	Sag1	Sag1	Sag1					
SAG2	Sag2	Sag2	Sag2					
AGENT1	agent1	agent1	9001					
AGENT2	agent2	agent2	9002					
AGENT3	agent3	agent3	9003					
AGENT44	agent_4	agent4	Vasilek					
CAMPAIGN_EXPORT	campaign_export	campaign_export						
OUTBOUND_ADMIN	outbound_admin	outbound_admin						
OUTBOUND_AGENT1	outbound_agent1	outbound_agent1	OUTBOUND_AGEN	т				
OUTBOUND_AGENT2	outbound_agent2	outbound_agent2	OUTBOUND_AGEN	T:				
							OK Ca	anc

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).

ile Edit View Navigate Qu	uery Tools Help					ORACL
) 🕁   🗛 🗹 🖄 (	8 🛛 📇 📓				Saved Queries:	
🖸 🕿 🕒 00:00:00	a 🕨 📥	→ 上部部公司公司			→   📥 →   🖏 → 🦏 →   🔗	
figuration:						
Home <u> </u>	🔠 Contacts 🚂 Opport	unities 🗎 Quotes 🛒 Sales	s Orders 🙎 Service 🛛 Ad	ministration - Communications		
t Language Mapping   Chat F	Parameter and Routing Administra	ation View Communications Drivers an	d Profiles   All Configurations	All Response Groups   All Temp	lates   Agent General Profile   All Active Ag	jent Status   All Telesets 💌
onfigurations	u 🔻 New Delete Qu	ery			8 - 17 of 17 Import Configuration	Export Configuration
Name 🛆	Commer	ıts				
VM_80_Uni						
Validation_81_blend_1	Julia					2
Validation_81_configsynch	Julia					
Validation_81_outbound	Julia					
Validation_81_voice_G3real	Julia					
ol_8.0.000.09	ologvyna					
so_1_8.0.000.04						
so_75_outbound						
> so_8.0.000.08						
so_8.0.000.09						
Parameters Profiles	Agents Commands Even	Handlers				
Menu 🕶 New Delete	Query				1 - 2 of 2   Ad	d by Responsibilities 主
Agent	Last Name	First Name	Agent Login	Password		
> OUTBOUND_AGENT1	outbound_agent1	outbound_agent1	OUTBOUND_AGENT1			
OUTBOUND AGENT2	outbound agent2	outbound agent2	OUTBOUND AGENT2			

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, page 137
- Configuring the Not Ready Device Command, page 140
- Synchronizing the Siebel Extensions and ACD Queues with the Configuration Environment, page 141
- The Siebel Extensions and ACD Queues Export/Synchronization Rule, page 142
- Synchronizing a Siebel Employee/Agent in a Genesys Configuration Environment, page 145

## 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).

			EY8wfki3GvSrnagyh-7Qx/WylOh490	31pa7mTJ6HzgY_&SWET5=1	19471147523485WEHo=gpvm4	
	* 2 5 5			Save	d Queries:	- C
figuration: Genesys Confi	the second s				and the second sector	
A CARDINAL STREET, SAN AND A	nts 🔢 Contacts 🎼 Op	Construction and an other	Charles Could a result on Statement 2 and 1		on - Communications 👻	
			emplates   Agent General Profi	ile   All Active Agent Statu	s   All Telesets   All Extensions	
\gent General Pr	ofile   Menu •   Query					1-1of1 🛛 🕞
	a second second second	and a second	and the second se	and a second		
Agent DEVI	Agent Login 1234	Password	First Name dev1	Last Name devl	Primary Configuration Genesys Configuration	
Agent DEVS	and a second second second second	Password			North Contraction of the State State State	
DEVS	and a second second second second	Password			North Contraction of the State State State	
Configurations	1234	Password		devi	Genesys Configuration	1-1 of 1
Configurations	1234 Telesets ACD Queues Velete Query Comments				Genesys Configuration	

Figure 75: The Agent General Profile Window

- **3.** Edit the agent login information, as follows:
- **a.** Assign the selected agent to a Siebel Teleset, which is the equivalent of a Genesys Agent Place:
- Assign the Selected Agent to a Siebel Teleset
- b. Click the Telesets tab (see Figure 75). The Telesets tab displays (see Figure 76 on page 138).

-	- Microsoft Internet Explorer						_ 0
ile Edit View P	Favorites Iools Help						
	👔 🐔 🔎 Search 👷 Favori	es 😧 🙆 - 🗞 🗔					
	vm4/calcenter_enu/start.swe?SWECr		/fkGGv5nnagyh-7QxVNylOh4931	pa7mTJ6HzgY_8/SWETS=	11847114752348/5WEHo=gpvm4	• 🛃 Go	Links
File Edit View No	avigate Query Tools Help					ORA	CLE
6 <b>[</b> ] 0   4	4 A 2 2 🗠 🛯			Save	d Queries:		00
	s Configuration > Agent:						
📔 Home  🛅 A	iccounts 🔠 Contacts 🎼 (	)pportunities 🐺 Sales Or	ders 🧏 Service 🗎 Q	Juotes Administrati	on - Communications 🔻		
ommunications Driver	rs and Profiles   All Configurations	All Response Groups   All Templ	ates   Agent General Profile	<ul> <li>All Active Agent State</li> </ul>	us   All Telesets   All Extensions	All Commands	*
Agent Genera	al Profile   Menu 🕶   Que	ry				1 - 1 of 1	<b>-</b>
Agent	Agent Login	Password	First Name	Last Name	Primary Configuration	n	
> DEVI	1234		dev1	dev1	Genesys Configuration		
	Telesets ACD Queues						
Menu 🔻 🛛 Nev	w Delete Query					No Records	1
	w Delete Query	ıst	Comments	_		No Records	-
Menu 🔻 🛛 Nev	w Delete Query	ıst	Comments	_		No Records	<b>7</b>

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).

				 La Harmonia	
Query	Find Teleset	 Starting with	«Case Required»	 G0 1-9 of	9
Teleset 📣	Comments				
1234-1001					
outb_3100					
outb_3101					
outb_3102					
outb_3103					
outb_3104					
outb_3105					
outb_3106					
vcb_4000					
				C	K Cancel
javascript:void	3(0)			Trusted s	tes

Figure 77: Add Telesets, Query Results

4. Click OK.

Figure 78 displays the Teleset that is assigned to the agent.

Bit       Yes       Figurates       Joint State         Bit       Implifyended deterter gradeter wer/SetCode upperSetEnde gradeter wer/SetCode upperSetEnde gradeter wer/SetCode upperSetEnde gradeter wer/SetEnde upperSetEnde upperSetEnde gradeter wer/SetEnde upperSetEnde gradeter wer/Set	Siebel Call Center -	Microsoft Internet Explorer							- D X
Back Inter-Upport   Address Inter-Upport   Address Inter-Upport   Address Inter-Upport   Address Inter-Upport   Address Inter-Upport   Address Inter-Upport   Inter-Upport Inter-Upport <th></th> <th></th> <th></th> <th></th> <th></th> <th></th> <th></th> <th></th> <th></th>									
Addess in http://gonet/addester_enulated.sue?9WECnd=LognbOVER=Lb_gn=UEXNbHCh4931pa?hTUXHgv_b0VETS=11847114723460WEhengovet			orites 😧 🙆 - 🚴 🗔						
Soved Queries:       Configuration > Agent:         Home       Accounts       Control guarations         Home       Accounts       Control guarations         Agent       Control guarations       All Commonities off         Agent       General Profile       Memory Configuration         Agent       Agent Login       Password         Piest Name       Last Name       Primary Configuration         Configurations       Telesets       ACCO Query         Configurations       Telesets       ACCD Query         Image:       New Order       Image:         Image:       New Order       Image:         Image:       Image:       Agent Configuration         Image:       Agent Configuration       Agent Configuration         Image:       Agent Configuration       Image:         Image:       Agent Configuration       Image:         Image:       Image:       Image:       Image:         Image:       Image:       Image:       Image:         Image:       Agent Configuration       Image:       Image:         Image:       Image:       Image:       Image:       Image:         Image:       Image:       Image:       Image:	Address a http://gpvm	4/calcenter_enu/start.swe?SWE	Cmd=Login8SWEPL=18_sn=	tOEY8wfkGGv5nnagyh-7QxWh	Oh4931pa7mT36HzgY_8/	SWET5=118471147523485WEHo=	gpvm4 💌	→ Go	Links **
Soved Queries:       Configuration > Agent:         Home       Accounts       Control guarations         Home       Accounts       Control guarations         Agent       Control guarations       All Commonities off         Agent       General Profile       Memory Configuration         Agent       Agent Login       Password         Piest Name       Last Name       Primary Configuration         Configurations       Telesets       ACCO Query         Configurations       Telesets       ACCD Query         Image:       New Order       Image:         Image:       New Order       Image:         Image:       Image:       Agent Configuration         Image:       Agent Configuration       Agent Configuration         Image:       Agent Configuration       Image:         Image:       Agent Configuration       Image:         Image:       Image:       Image:       Image:         Image:       Image:       Image:       Image:         Image:       Agent Configuration       Image:       Image:         Image:       Image:       Image:       Image:       Image:         Image:       Image:       Image:       Image:	File Edit View Navi	igate Query Tools Help					0	RAC	LE.
Configurations > Agent: Agent Contracts II Confuguration > Agent: Agent Contracts II Configuration   Al Response Groups   Al Templates   Agent General Profile   Al Active Agent 30 Autor   Al Extensions   Al Commands * Agent General Profile   Meru * Query I-1 of 1 P CEVI 1234 dev1 dev1 General Configuration Configurations Telesets ACD Queues Meru * New Celete Query I-1 of 1 P Teleset A How Celete Query I-1 of 1 P Teleset A How Celete Query I-1 of 1 P Teleset A How Celete Query I-1 of 1 P Securit Configuration = I How Celeter I	👗 🛗 🕘 🛛 🖄	A 2 2 19	8			Saved Queries:			
Communications Drivers and Profiles   Al Configurations   All Response Groups   All Templates   Agent General Profile   All Active Agent Status   All Extensions   All Commands * Agent General Profile   Meru *   Query 1 - 1 of 1 Agent Agent Login Password Pirst Name Last Name Primary Configuration > DEV1 1224 dev1 dev1 Genesys Configuration Configurations Telesets ACD Queues Meru * New Delete Query 1 - 1 of 1 Teleset: A Host Comments > 1294-1001	Configuration: Genesys C	onliguration > Agent:							
Agent General Profile       Meru *       Query       1-1 of 1       *         Agent       Agent Login       Password       First Name       Last Name       Primary Configuration         > DEV1       1234       dev1       dev1       Genesys Configuration         Configurations       Telesets       ACD Queues         Meru *       New Delete       Query       1-1 of 1       *         Teleset       Host       Comments       1-1 of 1       *	🚰 Home 🛅 Acc	ounts 🔢 Contacts 🔒	Opportunities 🐺 Se	ales Orders 🙎 Service	🗎 Quotes Admi	nistration - Communications	Ŧ		
Agent       Agent Login       Password       First Name       Last Name       Primary Configuration         DEV1       1234       dev1       dev1       Genesys Configuration         Configurations       Telesets       ACD Queues       1-1 of 1       P         Teleset 4       Host       Comments       1-1 of 1       P         1294-1001       1294-1001       1-1 of 1       P       P	Communications Drivers	and Profiles   All Configurations	All Response Groups   A	I Templates   Agent Genera	Profile   Al Active Ag	ent Status   All Telesets   All Ext	ensions   All Co	mmands	
DEV1     1234     dev1     dev1     Genesys Configuration       Configurations     Telesets     ACD Queues       Menu =     New Delete     Query       1 - 1 of 1     Teleset A       New Delete     Query       1 - 1 of 1     Teleset A       1 - 1 of 1     Teleset A       1 - 1 of 1     Teleset A	Agent General	Profile   Menu 🕶   🛛	luery				1 -	1 of 1	<b>P</b> 1
Configurations Telesets ACD Queues Menu  Herry Merry Delete Query I - 1 of 1 T Teleset  Host Comments  1234-1001		Agent Login	Password	First Name	Last Name	Primary Config	guration		
Menu *         New         Delete         Query         1 - 1 of 1         Image: Comments           Teleset A         Host         Comments	> DEV1	1234		dev1	dev1	Genesys Configu	ration		
Teleset          Host         Comments           1204-1001         *         *									
► 1234-1001 ▼ 1234-1001 ▼ 0 of 0							1-1	of 1	7
< 0400			Host	Comm	ints				
Done     O Trusted sites	1					0			• 0 of 0

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 Gplus 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<br/>Synchronization<br/>with GenesysA Siebel Agent, Agent01, is included in the Siebel configuration, Conf01. The<br/>Siebel configuration, Conf01, has two Adapter profiles: Prof01 and Prof02.<br/>The Adapter Profile, Prof01, includes the switch, Switch01. The Adapter<br/>Profile, Prof02, includes the switch, Switch02. In this example, the following<br/>options define the associated switch for the Siebel configuration, Conf01:<br/>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 *Gplus* 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.

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

## 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_

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_

#### Table 14: Siebel Skill Mapping (Continued)

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 *Gplus* 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 *Gplus* 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 Gplus 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 Gplus 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.
- 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**

Gplus 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





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 Gplus Adapter for Siebel CRM Deployment Guide. **Conditions and** 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 Gplus 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

- 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.

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

 Table 16: Campaign Synchronization Process Objects

Object	Description
Table Access Configuration Manager Object(s)	<ul> <li>One Genesys Configuration Manager Table Access object is created for every Siebel segment or list from the imported campaign.</li> <li>The object has the name created as a concatenation of the corresponding Siebel segment/list name and the corresponding campaign name.</li> <li>The object is created under a Table Access subfolder for the Siebel Call Center user who created the campaign.</li> <li>The Table Access folder assignment is specified within the TableAccessFolders section of the</li> </ul>
	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.

#### Table 16: Campaign Synchronization Process Objects (Continued)

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

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

**Compatibility** If you are using the Compatibility mode, then the Campaign Synchronization **Mode Summary** 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 Gplus *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.

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

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".	<ol> <li>The contact "Contact A" is assigned directly to the campaign "Campaign_1".</li> <li>The campaign "Campaign_1" is associated with the Genesys Campaign Export Position.</li> </ol>	Update record(s) for "Contact A" in the calling list "Campaign_1".
Delete the contact "Contact A" from the campaign "Campaign_1".	<ol> <li>Contact A is assigned directly to the campaign "Campaign_1"".</li> <li>The campaign "Campaign_1" is associated with the Genesys Campaign Export Position.</li> </ol>	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).	<ol> <li>Contact B is assigned to the segment/list "List A".</li> <li>The segment/list "List A" is assigned to the campaign "Campaign_1".</li> <li>The contact is a member of the campaign "Campaign_1" and Campaign_1 is associated with the Genesys Campaign Export Position.</li> <li>Either the Phone field or the Do Not Call field has been updated.</li> </ol>	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".	<ol> <li>The segment/list "List A" is assigned to the campaign "Campaign_1".</li> <li>The campaign "Campaign_1" is associated with the Genesys Campaign Export Position.</li> </ol>	Nothing. <b>Note:</b> 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_list 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.

#### Table 17: Use Cases Supported in Regular Mode (Continued)

# **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.

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.	<ol> <li>The contact, Contact A, is assigned directly to the campaign, Campaign_1.</li> <li>The campaign, Campaign_1 is associated with the Genesys Campaign Export position.</li> </ol>	Update the record(s) for the contact, Contact A in the calling list, Campaign_1.

#### Table 18: Use Cases Supported in the Compatibility Mode

What the Siebel Campaign Administrator Does	Condition(s)	What the Campaign Synchronization Component Does
Delete the contact, Contact A from the campaign, Campaign_1.	<ol> <li>The contact, Contact A, is assigned directly to the campaign, Campaign_1 directly;</li> <li>The campaign, Campaign_1 is associated with the Genesys Campaign Export Position.</li> </ol>	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.	<ol> <li>The campaign, Campaign_1 is associated with the Genesys Campaign Export Position.</li> <li>The Parent Campaign field for the campaign, Campaign_1 is empty.</li> </ol>	No actions until the campaign reloads.
Update the contact, Contact B.	<ol> <li>The contact, Contact B is assigned to the segment/list, "List A".</li> <li>The segment/list, List A is assigned to the campaign, Campaign_1.</li> <li>The campaign, Campaign_1 is associated with the Genesys Campaign Export Position.</li> </ol>	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.	<ol> <li>The segment/list, List A is assigned to the campaign, Campaign_1;</li> <li>The campaign, Campaign_1 is associated with the Genesys Campaign Export Position.</li> </ol>	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.	<ol> <li>The contact, Contact C is assigned to the segment/list, List A.</li> <li>The segment/list, List A is assigned to the campaign, Campaign_1.</li> <li>The campaign, Campaign_1 is associated with the Genesys Campaign Export Position.</li> </ol>	Nothing.

Table 18: Use Cases Sup	oported 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.	<ol> <li>The contact, Contact C is assigned to the segment/list, List A.</li> <li>The segment/list, List A is assigned to the campaign, Campaign_1.</li> <li>The campaign, Campaign_1 is associated with the Genesys Campaign Export Position.</li> </ol>	Nothing.
Delete the segment/list, List A from the campaign, Campaign_1.	<ol> <li>The campaign, Campaign_1 is associated with the Genesys Campaign Export Position.</li> <li>The Parent Campaign field for the campaign, Campaign_1 is empty.</li> </ol>	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.	<ol> <li>The campaign, Campaign_1 is associated with the Genesys Campaign Export Position.</li> <li>The campaign Child is not associated with the Genesys Campaign Export Position.</li> </ol>	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 M	Node (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.	<ol> <li>The parent campaign, Campaign_1 is associated with the Genesys Campaign Export Position.</li> <li>The campaign Child is associated with the Genesys Campaign Export Position.</li> </ol>	<ol> <li>Assign the calling list Child to the parent campaign, Campaign_1;</li> <li>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;</li> </ol>
Set the Parent Campaign field of the campaign, Child to Campaign_1.	<ol> <li>The parent campaign, Campaign_1 is not associated with the Genesys Campaign Export Position.</li> <li>The campaign Child is associated with the Genesys Campaign Export Position.</li> </ol>	3. Delete the campaign Child. 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.	<ol> <li>The contact Contact D is assigned directly to the campaign Child.</li> <li>The campaign Child is associated with the Genesys Campaign Export Position.</li> </ol>	Update the record(s) for the contact Contact D in the calling list Child.
Delete the contact Contact D for the campaign Child.	<ol> <li>The contact Contact D is assigned to the campaign Child directly.</li> <li>The campaign Child is associated with the Genesys Campaign Export Position.</li> </ol>	Delete the record(s) for the contact Contact D from the calling list Child.
Assign the segment/list List B to the campaign	<ol> <li>The campaign Child is associated with the Genesys Campaign Export Position.</li> <li>The Parent Campaign field of the campaign Child is set to Campaign_1.</li> </ol>	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.	<ol> <li>The segment/list List B is assigned to the campaign Child.</li> <li>The campaign Child is associated with the Genesys Campaign Export Position.</li> </ol>	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.	<ol> <li>The contact Contact E is assigned to the segment/list List B.</li> <li>The segment/list List B is assigned to the campaign Child.</li> <li>The campaign Child is associated with the Genesys Campaign Export position.</li> </ol>	Nothing.
Delete the contact Contact E from the segment/list List B.	<ol> <li>The contact Contact E is assigned to the segment/list List B.</li> <li>The segment/list List B is assigned to the campaign Child.</li> <li>The campaign Child is associated with the Genesys Campaign Export Position.</li> </ol>	Nothing.
Delete the segment/list List B from the campaign Child.	<ol> <li>The campaign Child is associated with the Genesys Campaign Export Position.</li> <li>The Parent Campaign field of the campaign Child is set to Campaign_1.</li> </ol>	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.	<ol> <li>The Parent Campaign field of the campaign Child is set to Campaign_1.</li> <li>The parent campaign, Campaign_1 is associated with the Genesys Campaign Export Position.</li> <li>The campaign Child is associated with the Genesys Campaign Export Position.</li> </ol>	<ol> <li>Create the campaign Child.</li> <li>Delete the calling list Child from the parent campaign Campaign_1.</li> <li>Assign the calling list "Child" to the campaign "Child".</li> <li>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.</li> <li>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.</li> </ol>
Delete the Genesys Campaign Export Position from the campaign Parent B.	None.	Nothing. <b>Note:</b> 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.	<ol> <li>Delete all calling lists objects assigned to the campaign, Campaign_1 the associated Table Access objects, and delete the Calling List tables with contacts.</li> <li>Delete the campaign, Campaign_1.</li> </ol>

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



Figure 84: Duplication of Contact Records





#### Chapter



# Troubleshooting

This chapter provides some solutions to common problems.

• Overview, page 187

# **Overview**

Use Table 19 to find solutions to some common problems.

#### Table 19: Problems and Solutions

Problem Description	Solution
The G <i>plus</i> 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.	<ul> <li>There might be conflicts between the existing configuration data and the data imported by the <i>Gplus</i> Adapter for Siebel CRM</li> <li>Configuration Synchronization Component from the Siebel environment to the Genesys environment—for example, in the following scenario:</li> <li>An agent with the user name, user 1, is imported by the Configuration Synchronization Component.</li> </ul>
Sieder environment.	<ul> <li>A Person object (not an agent) with the same user name (user 1) is created manually in Configuration Manager.</li> <li>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.</li> </ul>

## Table 19: Problems and Solutions (Continued)

Problem Description	Solution
After making changes to the objects imported by the G <i>plus</i> 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.	<ul> <li>Any voluntary changes made to the data in Configuration Manager, where the Gplus 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:</li> <li>An agent with the user name of user 1 was previously imported by the Configuration Synchronization Manager.</li> <li>A Person object (not an agent) with the same user name (user 1) is created manually in Configuration Manager,</li> <li>The agent, user 1, 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 Manager to correct any conflicts. After the conflicts are resolved, import the affected objects again.</li> </ul>
The Cannot connect to the server error message is displayed in the Siebel Call Center application.	Check that G <i>plus</i> 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 <i>plus</i> 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 Gplus Adapter for Siebel CRM Deployment Guide for more details).
After creating a new Siebel configuration with the Gplus 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 <i>plus</i> Universal profile) in the Siebel configuration is configured in accordance with the Gplus Adapter for Siebel CRM Deployment Guide.
If an agent logs into Siebel and the <i>Gplus</i> Communication Server has not yet been started, the Siebel CTI toolbar is inaccessible for this agent.	<ul> <li>Log out of Siebel.</li> <li>Make sure that the G<i>plus</i> Communication Server is started.</li> <li>Log back into Siebel again.</li> </ul>





**Supplements** 

# **Related Documentation Resources**

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

### **Gplus 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 *Gplus* 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 <u>http://genesys.com/customer-care</u>.

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 <u>orderman@genesys.com</u>.

# **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.

Type Style	Used For	Examples
Italic	<ul> <li>Document titles</li> <li>Emphasis</li> <li>Definitions of (or first references to) unfamiliar terms</li> <li>Mathematical variables</li> <li>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).</li> </ul>	Consult the <i>Genesys Migration Guide</i> for more information. Do <i>not</i> use this value for this option. A <i>customary and usual</i> 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)	<ul> <li>All programming identifiers and GUI elements. This convention includes:</li> <li>The <i>names</i> 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.</li> <li>The values of options.</li> <li>Logical arguments and command syntax.</li> <li>Code samples.</li> <li>Also used for any text that users must manually enter during a configuration or installation procedure, or on a command line.</li> </ul>	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. <b>Note:</b> 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⟩

#### Table 20: Type Styles



# Index

## Symbols

[] (square brackets).				2			2	. 194
< > (angle brackets)								

## A

ACD group									. 78
queue									
address book	•			•				•	107
agent									
place.									
angle brackets	•		-						194
applet									
call results workflow									
campaign workflow									. 50
campaigns									
status read-only detail.									
synchronization servers									. 46
audience, for document		1			1	1	۰.		10

#### В

basic voice
Campaign Synchronization Component. 157
batch
brackets
angle
square
button
accept
accept incoming interaction
accept multimedia interaction
accept phone
agent sign off
apply
attach
cancel interaction

e-mail
interaction processed
leave chat
login
logout
make call
make ready
mark phone dnc
mark record do not call
mark reschedule interaction
media type
not ready
on call
preview
preview dialing mode
preview record request
ready
record cancel
reject interaction
reply
reply all
request chain record
start preview
stop preview/preview mode over
transfer

#### С

call	
notification	
Genesys	20
results.	97
synchronization	29
status	92
all center	6
alling list	35
management	6
campaign	
configure 6	39

definition
parallel
synchronization
synchronization
manage
campaign export position
Campaign Synchronization Component . 28,29,
30, 158, 159, 170, 171, 172
8.0.1
data
conditions and requirements for using 160 mapping conventions
mapping conventions
naming convention for campaigns and lists
171, 176
process objects
starting
Campaign Synchronization component
subsystem, creating
CampSynch Configuration object
chat
multimedia
transcript
-clean_batch
Campaign Synchronization Component 157
command
add to do not call list
communications
context-sensitive
process records with the same call result 98
schedule a callback
transfer
commands
call result
commenting on this document
communication administration
accessing
communications
command
toolbar
compatibility mode
campaign synchronization
component
Multimedia
components
Campaign Synchronization 17, 159
Configuration Synchronization
Media Routing
Outbound Campaign
Voice
Configuration Server
backup
princip

Configuration Synchronization Component . 27, 145, 149, 156, 157
console
management
campaigns
request queue
servers
contact center
See call center or Siebel Call Center 16
convention
mapping
naming
conventions
in document
type styles
create
object
CampSynch Configuration
CTI

## D

data												
flow											. 36	6
data flow	· .	١.	Ϊ.	Ϊ.	١.	١.	١.	Ϊ.	١.	Ϊ.	. 36	6
database synchronizatio												
desktop interfaces												
command					÷		÷			÷	. 18	3
Siebel eMail routing.											. 24	1
details view												
contact/prospect												
dialing mode	• •	•	•	÷	÷	÷	÷		•	•	.22	2
document												_
audience												
change history												
conventions												
errors, commenting or												
version number	· •	٠.	۰.	•	۰.	۰.	÷	÷	•	÷	193	3

#### Е

eMail	22
editor	
Siebel	53
Siebel	26
response	52
e-mail	23
inbound 26, 105, 107, 116, 120, 1	53
outbound 105, 107, 116, 120, 1	54
employee	
assignment	
skill	48
eServices	10

event
EventRinging
OpenMediaInvited
event handlers
expert contact
exporting
Siebel campaigns to Genesys 159

## F

feature														
expert contact					2	2		2				2		101
field														
# of attempts.												2		. 92
call status			2		2	2		2				2		. 93
outcome			2		2	2		2				2		. 93
font styles														
italic												2		193
monospace .			2		2	2		2				2		194
Framework	۰.	۰.		1	۰.	۰.	1		۰.	۰.	۰.	۰.	10	), 15
full														
mode					÷									. 43

# G

Genesys
campaign export
position
chat
activity
Configuration Layer
Configuration Management
Configuration Manager
Configuration Server
e-mail
Management Layer
Multimedia
Outbound Contact
Outbound Contact Manager
outbound desktop protocol
Universal Contact Server
Universal Queue
Universal Router
Universal Router Server

## Η

hot keys																				18
----------	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	----

#### 

importing

	,					
Siebel	campaigns to C	Genesys			159	

inbound interaction mark done
incremental
mode
intended audience
interaction
co-browse
expert contact
Genesys chat
Genesys e-mail
inbound
outbound
phone
push preview
interactive voice response
introduction
italics

## L

link	
object	
CampSynch Configuration	.71
list	
calling	. 35
do not call	
generic term for list or segment.	168
listener services	.27

#### Μ

manage	
campaign	4
console	
campaigns	
request queue	4
servers	2
synchronization	
management console	
campaigns	
request queue	
servers	
summaries	
supervisory panel	7
supervisory panel - request queue detail 60	
supervisory panel - summaries detail 62	2
supervisory panel-status detail 5	7
manual	
mode	3
Media Routing Component 122, 123	3
media type button	0

mode
callback preview
compatibility
dialing
asm
predictive . 80, 90, 92, 93, 94, 128, 91, 95,
101, 80, 92, 93, 94, 22, 96, 97
full
incremental
real-time
regular
warm standby
monospace font
Multimedia Component
Multimedia e-mails

# Ν

notification, phone call			
numbers	• • •	• •	 92
phone			
extension.			 166

# 0

object
CampSynch Configuration
create
link
OCS, see Outbound Contact Server 88
option
confirm-status
driveralias
logoutcontrol
preview-bell
preview-interaction
outbound
interaction
save&close
outbound campaign
mode
predictive
Outbound Contact Manager
Outbound Contact Server (OCS). 10, 22, 88, 127
call result commands
outcome
overview
schema
conceptual

## Ρ

parallel										
campaign		÷			÷				÷	. 42

phone call notification . place						
Genesys campaign export. push preview.						

#### R

ready button
campaign data synchronization
record
activity
regular mode
campaign synchronization
relationship
parent-child
request
order
processing
queue
synchronization
requirements
campaign synchronization
reschedule time

### S

scenario procedure
XML
screen pops
segment
Siebel
acd queue
activity
agent login
business service
Call Center
communications command
communications toolbar 15, 17, 24
EAI
eMail
response
extension
server
smart answer
square brackets
standard response library
state
notready
ready

status	
reschedule time	93
subsystem	
creating	67
synchronization	
campaign	
load	74
parallel	42
wave	74
disable	71
enable	71
Genesys	
Siebel	40
manual	75
mode	
full	43
incremental	43
manual	43
queue	38
request	38
Siebel	
Genesys	39
start	73
stop	
synchronization of databases	27

# Т

time zone
support
synchronization, required for campaign
synchronization
troubleshooting
type
campaign
personal
type styles
conventions
italic
monospace
typographical styles

### U

universal callback	.20, 23
Universal Callback Server (UCB)	98
Universal Queue	24, 152
Universal Routing	10

## V

version numbering, document											
view buttons	19										
voice											

call
answer
cancel
forward request
hang
retrieve
transfer
Voice Component
basic voice
call
make
expert contact
outbound campaign
universal callback

#### W

warm stand	db	y	m	00	de								29	9, 30
web brows	er							2						.16
web client	2						2	2			2			. 16
workbin .				÷			2				2			109

# X

XML											.29

## Ζ

zero footprint.																	.16	
-----------------	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	-----	--

Index