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CIC Integration to Siebel

Installation and Configuration Guide

Abstract

This installation guide provides a summary of the installation process, as well as detailed steps for installing and configuring the CIC Integration to Siebel.

For the latest version of this document, see the PureConnect Documentation Library at: <http://help.genesys.com/cic>.

For copyright and trademark information, see https://help.genesys.com/cic/desktop/copyright_and_trademark_information.htm.

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Overview of the CIC Integration to Siebel

The CIC Integration with Siebel integrates the functionality of the Customer Interaction Center Client into the Siebel Web or thin client. The integration uses a combination of the PureConnect platform's IceLib SDK and Siebel's Adaptive Communications API.

The screenshot displays the Siebel CRM interface for a contact named 'Test Tester'. The contact details are as follows:

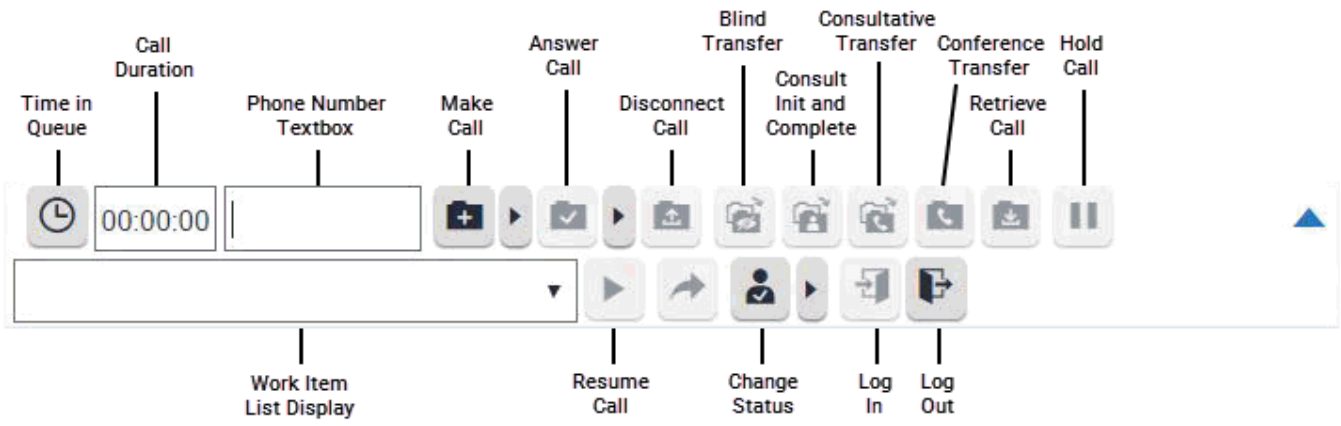
Last Name*	Tester	Work #	(317) 957-1447	Account	Genesys	Site
First Name*	Test	Main Fax #		Address		
Job Title		Mobile Phone #		City		State
Mr/Ms	▼	Email		Zip Code		Country

Below the contact details, the 'Activities' section shows a list of call reports:

Ne Call Report	Activity	Type	End	Status	Description
	General	Call - Inbound	12/14/2018 09:32:05 AM	Done	Inbound call
	General	Call - Inbound	12/12/2018 01:49:14 PM	Done	Inbound call
	General	Call - Inbound	12/12/2018 01:35:33 PM	Done	Inbound call

The integration allows the Siebel agent to perform all phone operations while providing a powerful screen pop to virtually any Siebel view, based on data collected in the phone system.

This integration gives IT departments the ability to choose their architecture infrastructure. Administrators can deploy the integration to agent workstations, or install it on one server. Most of the visual integration resides in the Siebel Communications toolbar.



CIC Integration to Siebel Architecture

Server-side integration

The integration installation includes a C++ driver dll (named `inin_integrations_siebel_interopU.dll`) plus numerous dependencies (e.g. `IceLib`). The `inin_integrations_siebel_interopU.dll` is loaded directly by the Siebel's Communication Session Manager Component (aka. `CommSessionMgr`) on the Siebel server.

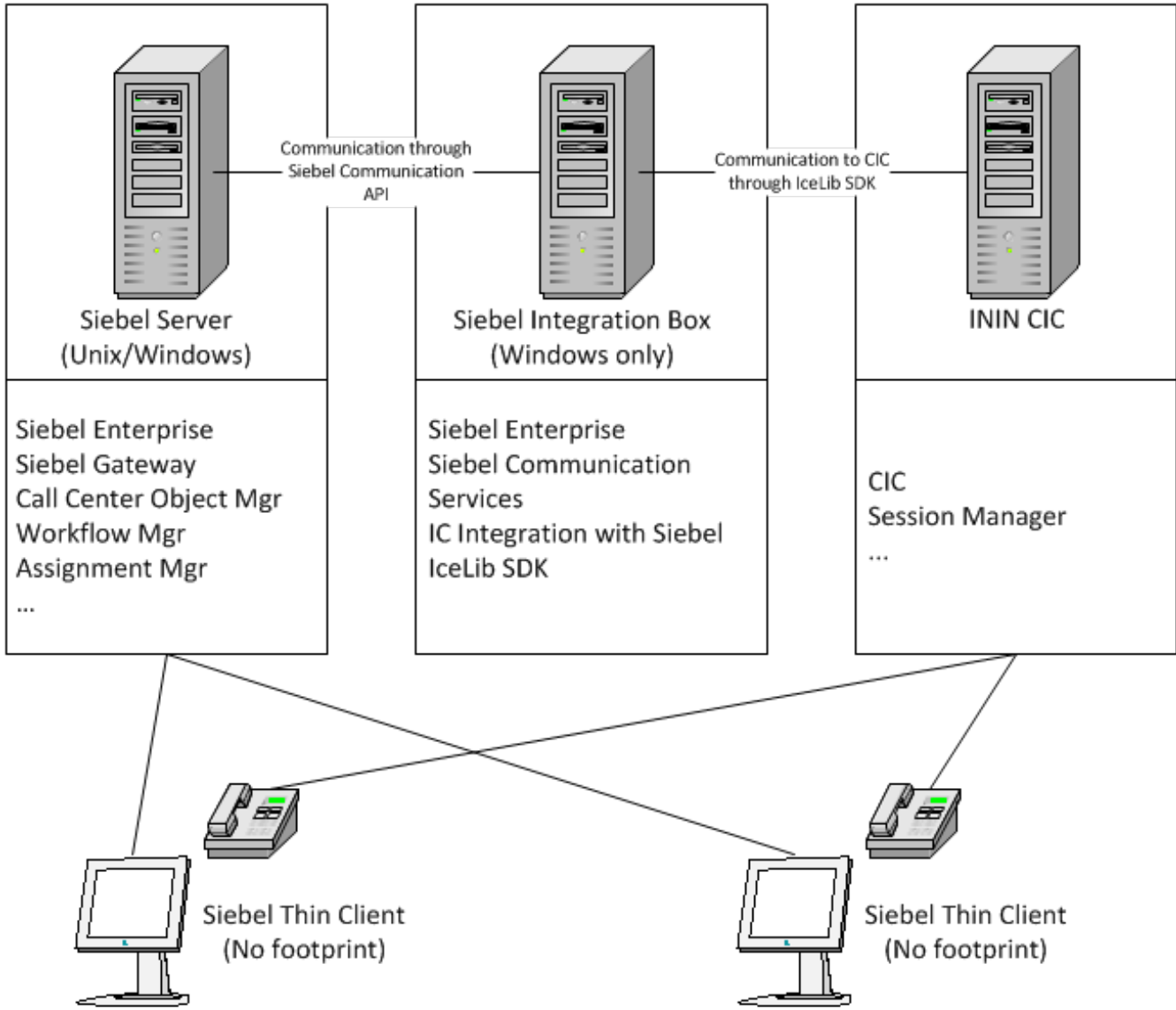
Integration components deployment

The integration components are installed directly on the Siebel server alongside the Siebel Communication services (specifically the Siebel Communication Session Manager). Siebel can be deployed on numerous different OS platforms, but the CIC Integration with Siebel components must be installed on a Windows platform, typically on Windows Server preferably 2012 R2 (64-bit) or 2016 (64-bit). If your implementation has more than 200 agents, Siebel recommends you use a separate server in the Siebel Enterprise setup. In the diagram below, the "Siebel Integration Box" depicts running in this split configuration.

Implementing in a UNIX environment

A Siebel deployment typically has many servers. The integration requires a Windows platform. Therefore, you can deploy separate Windows Siebel Enterprise Servers running Siebel's Communication Services, CIC's `IceLib` API, and the CIC Integration with Siebel.

This figure illustrates the CIC Integration with Siebel Architecture.



System requirements

CIC Integration with Siebel must be installed:

- On a Windows OS (preferably 2008 R2 or 2012 R2). See the Siebel documentation for Siebel server Windows server requirements.
- Concurrently with Siebel Communications Services (which specifically includes the Siebel Communication Session Manager)

Siebel integration server/Siebel server

The following items must be running on the Siebel server:

- Siebel 7.X, Siebel 8.X, Siebel Innovation Pack 2014, Siebel Innovation Pack 2015, Siebel Innovation Pack 2016, Siebel Innovation Pack 2017, or Siebel Innovation Pack 2018.

Note: License required. Sections of the installation are tailored to a specific version of Siebel.

- Customer Interaction Center Integration with Siebel
- Typically, the Siebel Server and the Siebel Integration co-reside on a server. However, as illustrated in the architecture section, these components could reside on separate servers in the Siebel Enterprise.

Note: Refer to Siebel's documentation for requirements of the Siebel Servers. Install the CIC Integration with Siebel only on the servers running the Siebel Communications Session Manager.

- 20 Gigabytes of free hard disk space (for logging)
- Windows Server 2012 R2 (64-bit) or 2016 (64-bit), which are Microsoft Windows-based operating systems. See the Siebel documentation for specific server grade requirements.
- Microsoft Framework (version 4.0)
- IceLib (Included in installation) No license required
- Siebel Communication Management Services (Required component: Communications Session Manager)

CIC server

See the *PureConnect Installation and Configuration Guide* in the [PureConnect Documentation Library](#) for CIC server requirements. The integration requires no installation on the CIC server.

Make sure you update the CIC server and workstations to CIC 2018 R1 before installing or applying the CIC Integration with Siebel. See the [CIC Latest Release](#) page for special notices and release documentation.

Installing the CIC integration with Siebel

The integration must be installed on the Siebel server that is running the Siebel Communication Session Manager. This component loads the integration (also known as the CTI driver).

To install the integration on the Siebel server:

1. If you have not done so already:
 - a. Download the CIC 2018 R1 or later .iso file from the Interactive Intelligence Product Information site at <https://my.inin.com/products/Pages/Downloads.aspx>.
 - b. Copy the .iso file to a file server (non-IC server) with a high bandwidth connection to the server(s) on which you will be running the CIC installs.
 - c. Mount the .iso file and share the contents to make them accessible to the server(s) on which you will be running the CIC installs.
2. Navigate to the \Installs\Integrations directory on the file server.
3. Copy the CIC Integration with Siebel .msi file, for example, **SiebelIntegration_2018_R1.msi**, to the server on which you plan to run this install and double-click to launch it.

The Welcome dialog box appears.
4. Click **Next**.

The Custom Setup dialog box appears.
5. By default, the installation chooses C:\Program Files\Interactive Intelligence\Siebel folder as the installation location. You can optionally click **Browse** to change the installation folder.
6. Click **Next**.

The Ready to install IC Integration with Siebel dialog box appears.

Note: Based on the specified version, IceLib SDK installs itself automatically.
7. If the CIC Integration is the first Genesys product installed on the server, the Logging File Path dialog box appears. This dialog box allows you to specify the folder for the integration logging. It is preferred to write logging data to any disk that is not running the OS. For example the D or E drive.
8. Click **Install**.

The CIC Integration with Siebel displays a status bar and messages as the installation progresses. When finished, the Completed the CIC Integration with Siebel Setup Wizard dialog box appears.
9. Click **Finish**.
10. If prompted, restart the server to complete the installation process.

Note: If you are running Windows Server 2016 or higher, you might receive the following error message: "Failed on sending request or failed on processing request in server <server name>".

If you receive this message, you must manually copy the integration files from the installation directory (for example, c:\Program Files (x86)\Interactive Intelligence\Siebel) to the Siebel Server's bin directory at <drive>:\sbaXX\siebsrvr\BIN (where XX is the version of your Siebel install).

Genesys is working on a solution to this issue, but if you update CIC in the meantime, you must manually copy the updated integration files to the bin directory with each new update.

Upgrading Siebel integration to CIC 2018 R1 or later

Upgrading from CIC 2.3.1, CIC 2.4, or CIC 3.0

To upgrade to CIC 2018 R1 or later from CIC 2.3.1, CIC 2.4, or CIC 3.0:

1. On the server running the Siebel Communications Session Manager (with the CTI driver), stop Siebel Enterprise.
2. Open **Add/Remove Programs**, locate the CIC Integration with Siebel (also known as Siebel Application Connector) and choose to uninstall this application.
3. Open **Add/Remove Programs**, locate ClientCOM, and choose to uninstall this application.
4. If prompted, restart the computer.
5. Open the `<DRIVE>:\sieXX\siebsrvr\BIN` directory or in the `<DRIVE>:\sbaXX\siebsrvr\BIN` (where *XX* is the version of Siebel install) directory. Does the `CIC Scapi.dll` file exist in this directory?
 - o If yes, delete the file.
 - o If no, skip to the next step.
6. Open the `<DRIVE>:\Program Files\PureConnect` directory. Does the `ClientCOMA.dll` file exist?
 - o If yes, delete the entire PureConnect folder.
 - o If no, skip to the next step.
7. Follow the installation steps in the previous section. When prompted, restart the computer.

Resetting the library name of the CTI Driver

It is likely that customizations were made to the Siebel Configuration for the Driver and CTI Configuration when it was connecting to a CIC 2.3.1 or CIC 2.4 server. That configuration was not modified during this installation process. However, to load the new 3.0 IC CTI driver correctly, reset the library name of the CTI driver:

To reset the library name of the CTI driver:

1. Open Siebel and log on as a Siebel Administrator.
 2. Browse to **Site Map > Administration Communications > Communications Drivers > Profiles**.
 3. Locate the CIC driver. The name is typically **I3 CTI** or **ININ CTI**.
 4. Select the Communications Driver.
 5. Locate the **Library Name** column. The current value is typically `cicscapi.dll`.
 6. Change the value to `inin_integrations_siebel_interopU.dll` and exit the record. Be sure to review the parameters in the Driver section because they have changed slightly in recent CIC versions:
 - o `Driver:WorkItemDescriptionFormat`
 - o `Driver:EventCustomAttributes`
 - o `Driver:DisabledEvents`
- Note: For more information, see [Reviewing and modifying the communications drivers and profiles](#).
7. Restart the computer.
 8. Restart Siebel Services or the Siebel Communications Session Manager.

Configuring CIC integration with Siebel

Following are the configuration changes that are required to enable the integration functionality:

- [Importing the InteractiveIntelligence.def file](#)
- [Reviewing and modifying the communications drivers and profiles](#)
- Mapping agents' phones to workstations
- [Allowing agents access to the Communication Toolbar](#)
- Setting the agents' user names
- Adding status data to Siebel's reason code list of values
- [Editing the Siebel configuration files](#)

To get started, log on as a Siebel Administrator in to the web or Thin client.

Siebel Communications Server provides import and export mechanisms that enable you to move communications configuration data from the database to a text file.

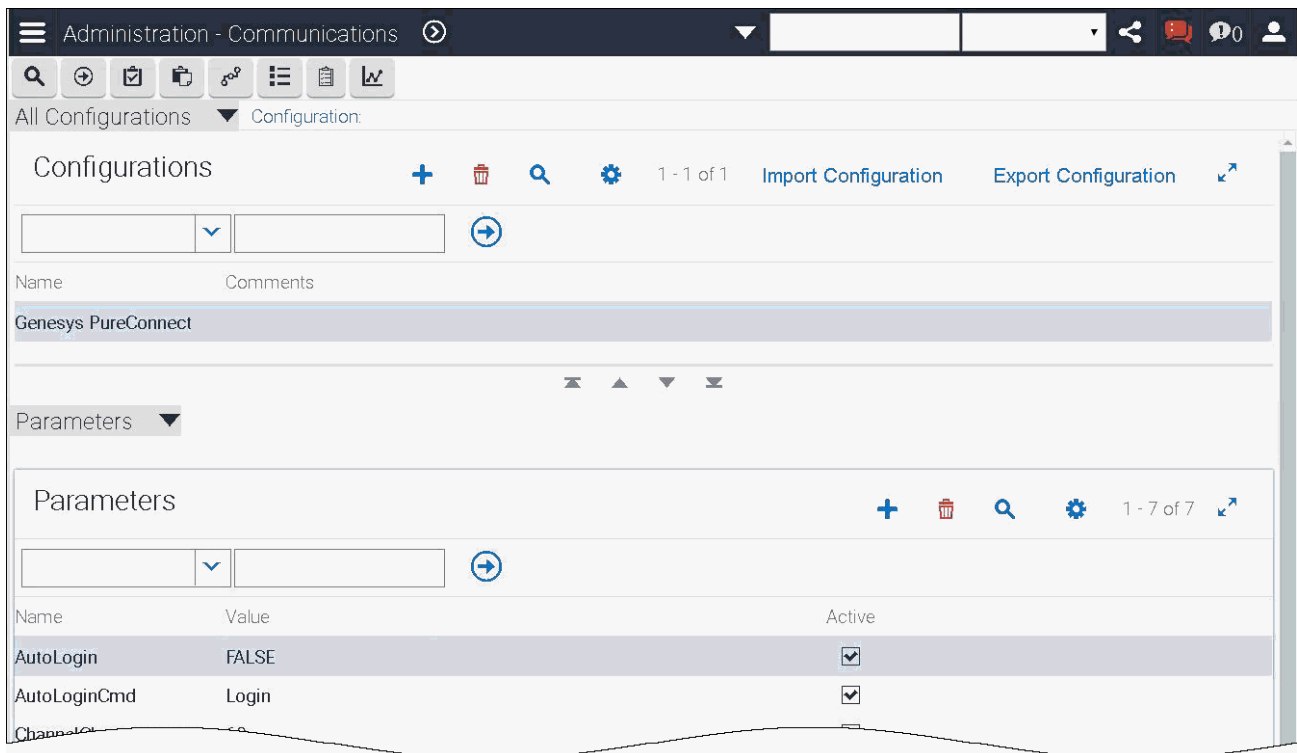
Importing the InteractiveIntelligence.def file

The installation program for the Siebel integration installs the file **InteractiveIntelligence.def**. It contains the base set of configuration data for integrating Siebel with CIC.

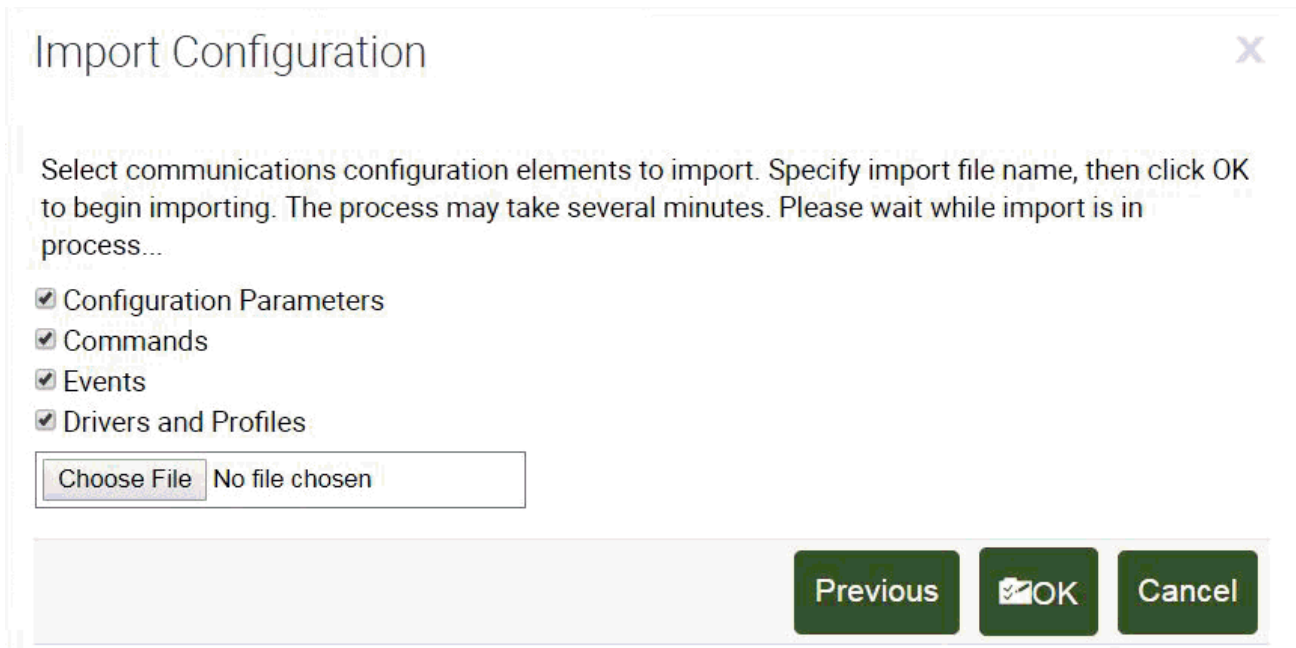
To import the file:

1. Log on to Siebel as a Siebel Administrator and press **Ctrl+Shift+A** to open the Site Map.
2. Select **Administration – Communications**, then click the **All Configurations** link.

The Configuration window appears.



3. In the **Configurations** section, click the plus sign to create a new configuration.
 4. In the **Name** and **Comments** section, type a name and description for the configuration. For example: Interactive Intelligence.
 5. Click **Import Configuration** in the upper right corner of the **Configurations** section.
- The Import Configuration dialog box appears.



6. Select the following options:
 - Configuration Parameters
 - Commands
 - Events
 - Drivers and Profiles
7. Click **Browse** and browse to the **InteractiveIntelligence.def** file.
8. The installation program copied the file to its default location:
c:\Program Files\Interactive Intelligence\Siebel\
9. Click **OK**.

The file is imported.

Reviewing and modifying the communications drivers and profiles

The driver settings for the integration are specific to each environment. For more information about Profiles, see the *Siebel Communications Server Administration Guide* in *Siebel Bookshelf*.

To review and modify the communications drivers and profiles:

1. Logon to Siebel as a Siebel Administrator and press **Ctrl+Shift+A** to open the Site Map.
2. Click **Administration – Communications**, then click the **Communications Drivers and Profiles** link.
The Driver window appears.

Administration - Comm... 🔍 🔗 💬 👤

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Communications Drivers and Profiles ▼ Driver:

ERM Administrator Definition	Search Definition			1.0
FTP	FTP	<input checked="" type="checkbox"/>		FTP
Field Service Definition	Search Definition			1.0
File System	Connector			1.0
File System OSES	Connector	<input checked="" type="checkbox"/>		1.0
Interactive Intelligence CTI Driver	Voice	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	13 CTI
Internet SMTP/IMAP Server	Email	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	IMAPSI
Internet SMTP/POP3 Server	Email	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	POP3SI

Profiles ▼

Driver Parameters

Profiles + 🗑️ 🔍

Name ▲▼	Organization	Responsibilities
Interactive Intelligence CTI Profile	Default Organization	

Profile Parameter Overrides + 🗑️ 🔍

3. Select the **CTI Driver**.

The Profiles view expands to display profiles. To see the driver parameters, select "Driver Parameters" from the drop down menu, as shown above.

Administration - Comm... 🔍 🔗 💬 👤

Communications Drivers and Profiles ▾ Driver:

SelfService Definition Search Definition 1.0

Driver Parameters ▾

Driver Parameters + 🗑️ 🔍

▾

Name	Required	Default Value
Driver:ANIAttributes	<input checked="" type="checkbox"/>	Eic_RemoteAddress,Eic_RemoteId,Eic_RemoteTnRaw
Driver:AdditionalAssemblies		
Driver:AdminPwd	<input checked="" type="checkbox"/>	1234
Driver:AdminUser	<input checked="" type="checkbox"/>	admin_user
Driver:AvailableState	<input checked="" type="checkbox"/>	Available
Driver:DisabledEvents		
Driver:EventCustomAttributes		Siebel_ContactId
Driver:KeepAlive		true
Driver:NotReadyState	<input checked="" type="checkbox"/>	Do Not Disturb
Driver:PrimaryServer	<input checked="" type="checkbox"/>	Pureconnect1.mydomain.com

- Review the parameters and profiles and, when applicable, modify your settings. To determine the best configuration for your environment, use the following table as a guide.
- When finished, do the procedure [Add the KeepAlive parameter](#).

CTI driver parameters

The following table lists all of the accepted and required driver parameters and corresponding descriptions of the integration.

Driver Parameter	Description
Driver:AdditionalAssemblies	Not currently used. For future use.
Driver:AdminPwd	Super user's password created in Interaction Administrator. See Creating a CIC super user .
Driver:AdminUser	Super user's user name created in Interaction Administrator. See Creating a CIC super user .

Driver:AvailableState	<p>CIC status used when the agent is switching between the AvailableState and NotReadyState.</p> <p>Default: "Available"</p> <p>If "Available" is not the appropriate ReadyState status, you can change it to any CIC available status in the Interaction Administrator under Status Messages. Enter the correct value in the Message Name column.</p> <p>Note: Do not enter the value from the Message column. For more information, see Adding status data to Siebel's reason code list of values.</p>
Driver:DisabledEvents	<p>Comma-separated list of events to disable or not send.</p> <p>In the previous version of the integration, there was a separate configuration for each event. Now these events have combined into one value.</p> <p>Events are used to cause screen pops and backend process within the Siebel Framework. By default, CIC sends all events. If there are events that you do not intend on using, add them to this list.</p> <p>Available Events:</p> <p>EventRinging EventConnected EventDialing EventEstablished EventDisconnected EventReqPop</p> <p>Default: ""</p>
Driver:EventCustomAttributes	<p>List of interaction attributes to deliver on every event sent to Siebel. Define any custom attributes collected in the IVR that need to be delivered to Siebel for screen pop or data insertion.</p> <p>In previous versions of the integration, stock attributes (S_ICValueXX) were always delivered. In the current version, you can define which attributes on the interaction you would like via a comma-separated list of attribute names.</p> <p>Default: Siebel_ContactID</p>
Driver:NotReadyState	<p>CIC status used when an agent is toggling between the AvailableState and NotReadyState.</p> <p>Default: "Do Not Disturb"</p> <p>If "Do Not Disturb" is not the appropriate ReadyState status, you can change it to any CIC available status in the Interaction Administrator under Status Messages. Enter the correct value in the Message Name column.</p> <p>Note: Do not enter the value from the Message column. See Adding status data to Siebel's reason code list of values for more information.</p>
Driver:PrimaryServer	<p>Name of the server that is typically the site's primary server, not necessarily the current primary server. The configuration does not ask for the backup server because once the integration connects the initial time, it caches the primary and backup information on the Siebel server.</p> <p><CIC_SERVER_NAME></p>

Driver:WorkItemDescriptionFormat	<p>This setting allows you to control what is shown in the Work Item Description list for each interaction.</p> <p>Use the [Attribute] tagging mechanism to be replaced with attributes on the call. For instance, [Eic_RemoteTn] will be replaced with the ANI value.</p> <p>Default: [Type] - [RemoteName]: [Eic_Remoteld]</p>
Driver:URL	Not currently used. For future use.
Service:User	<p>User name of the Siebel agent who is logging in. The parameter can be either {@UserName} or {@AgentId}.</p> <p>If @UserName, the Siebel and CIC user names must match.</p> <p>If @AgentId, use the Siebel Agent General Profile for setting each user's user name manually. The benefit of this parameter is that you can have different user names for the two systems.</p> <p>Default: {@AgentId}</p>

Add the KeepAlive parameter

Adding the KeepAlive parameter enables the integration to recognize new users even if no current users are logged on to the system.

1. Logon to Siebel as a Siebel Administrator and press **Ctrl+Shift+A** to open the Site Map.
2. Click **Administration – Communications**, then click the **Communications Drivers and Profiles** link.
The Driver window appears.

Administration - Comm... 🔍 🔗 💬 👤

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Communications Drivers and Profiles ▾ Driver:

ERM Administrator Definition	Search Definition			1.0
FTP	FTP	<input checked="" type="checkbox"/>		FTP
Field Service Definition	Search Definition			1.0
File System	Connector			1.0
File System OSES	Connector	<input checked="" type="checkbox"/>		1.0
Interactive Intelligence CTI Driver	Voice	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	13 CTI
Internet SMTP/IMAP Server	Email	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	IMAPSI
Internet SMTP/POP3 Server	Email	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	POP3SI

Profiles ▾

Driver Parameters

Profiles

+ 🗑️ 🔍

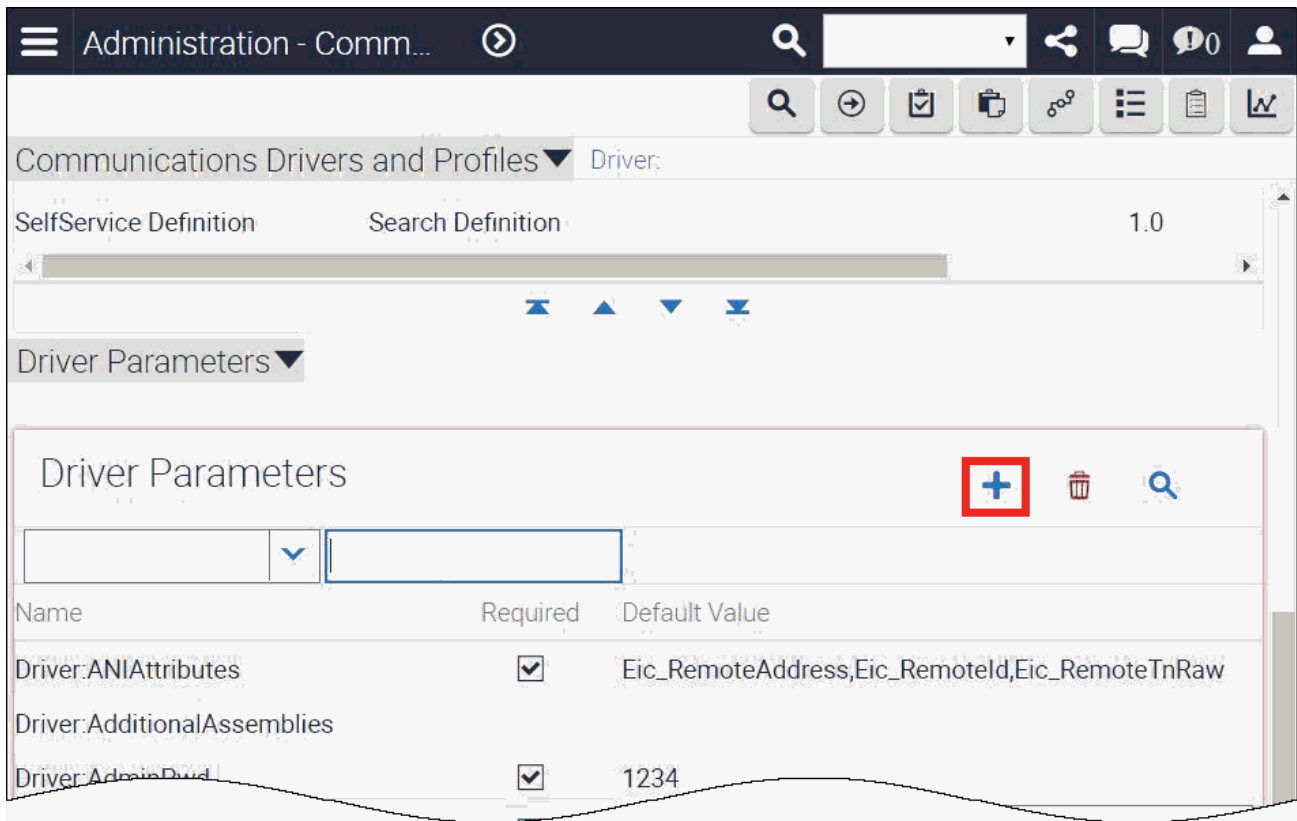
Name▲▼	Organization	Responsibilities
Interactive Intelligence CTI Profile	Default Organization	

+ 🗑️ 🔍

Profile Parameter Overrides

3. Select the **CTI Driver**.

The Profiles view expands to display profiles. To see the driver parameters, select "Driver Parameters" from the drop down menu, as shown above.



4. Click the plus sign to create a new parameter.
5. On the row for the new parameter:
 - Set the parameter name to Driver:KeepAlive.
 - Leave the Required column blank (not required).
 - Set the default value to **true**.
6. Click another row to save your new driver information.

Understanding profiles

A profile can override specific driver variables for a specific configuration. Multiple profiles can be associated with one driver. This allows one driver to be used in many different ways. For example, one profile can be set up for one CIC server while a second profile connects to another CIC server within the same organization.

For more information on creating profiles, refer to the *Siebel Communications Server Administration Guide*. By importing the “out of the box” *InteractiveIntelligence.def* file, one profile is associated with the CTI driver. You can change the name of the profile and the overriding parameters, as necessary.

Mapping agents' phones to workstations

Following are the approaches you can take to map agents' phones to workstations:

- [Running Siebel with the CIC client](#)
- [Running Siebel without the CIC client](#)
- [Creating telesets for agent workstations](#)

Note: CIC supports several interaction management client applications. The Siebel integration only works with Interaction Desktop. This documentation uses the term “CIC client” to refer to Interaction Desktop.

Running Siebel with the CIC client

If you are handling emails, web chats, or callbacks, then you must run Siebel with the CIC client. The CIC client provides the controls the agent needs to interact with these items. If the CIC client is not present, then the agent cannot interact with them.

If you are running Siebel with the CIC client, then the agent must simply log on to the CIC client before logging on to Siebel. The Siebel Integration piggy backs on the the CIC client session to retrieve the logged in workstation.

Running Siebel without the CIC client

Following is the preferred approach to mapping agents to workstations if you are not using the CIC client.

If you are running Siebel without the CIC client, agents can map their logins to specific workstations by using features on the Communications toolbar:

- **Traditional:** An agent can be seated next to a workstation that has a name. In this case, the agent can log on to Siebel by typing the workstation name in the left-hand text box on the Communications toolbar. Then, the agent clicks the open door icon on the toolbar to log on.
- **Remote Workstation:** An agent can be connected to a remote workstation. This is a separate phone system that is not standard registered IP phone). In this case, the agent can log on to Siebel by typing the remote workstation name in the left-hand text box on the Communications toolbar. Then, the agent clicks the open door icon on the toolbar to log on.
- **Remote Number:** An agent can be connected by a remote number. For example, an agent can work at home and dial-in to receive calls. To log on to a remote phone, an agent types the remote phone number in the left-hand text box. At the end of the number, the agent adds the following characters, as appropriate:
 - **/R** for a remote login
 - **/R /P** for a remote persistent connection

For example, type 8723000/R/P in the left-hand text box on the Communications toolbar. Then, clicks the open door icon on the toolbar to log on.

Note: This functionality is available only if you allow your agents to log on to remote number stations. If you do not allow this functionality, then agents receive an error message if they try to use it.

Creating telesets for agent workstations

Note:

Create telesets only if the other approaches are not appropriate for your location.

For the integration, telesets have a one-to-one association with workstations within Interaction Administration. A workstation is actually a computer workstation with an associated phone. For every workstation you define in Interaction Administrator, you need to create a teleset.

Before creating a teleset, compile a list of all the CIC workstations and their associated extensions.

[Appendix A - workstations template](#) contains a worksheet you can use to keep track of the workstations.

Note:

If you will be logging in to remote workstations or you want to allow users to dynamically specify the workstation at login time, you do not need to create a teleset. Through use of the telephone textbox on the Siebel toolbar, users can login to a defined workstation, defined remote workstation, or dynamic remote number station. However, the integration is not able to login to a SIP softphone workstation (using workstation as the RTP endpoint with a USB headset or something comparable).

To create Siebel telesets and enable agent workstations to utilize CIC Integration with Siebel:

1. Log on to Siebel as a Siebel Administrator and press **Ctrl+Shift+A** to open the Site Map.
2. Select **Administration - Communications**, then click the **All Telesets** link.
The **Teleset** window appears.

The screenshot shows the Administration - Comm... interface. At the top, there is a navigation bar with a search icon and a dropdown menu. Below the navigation bar, there is a toolbar with various icons. The main content area is divided into two sections: Telesets and Extensions.

Telesets Section:

- Header: Telesets
- Buttons: + (highlighted with a red box), trash, search
- Form: Two input fields, one with a dropdown arrow.
- Table:

Teleset	Host	Comments
1000	SOMA	Soma Workstation
- Navigation: Four arrows (left, up, down, right).

Extensions Section:

- Header: Extensions
- Buttons: +, trash, search
- Form: Two input fields, one with a dropdown arrow.
- Table:

Extension Type	Extension
S	1000
- Navigation: Four arrows (left, up, down, right).

3. Click the plus sign. In the **Teleset** column, type in the workstation extension from the compiled workstation list. The workstation extension is the extension of the defined workstations within Interaction Administrator.
4. In the **Host** column, enter the workstation name from the compiled workstation list. The workstation name is name of the defined workstation within Interaction Administrator.
5. In the bottom half of the window, select the **Extensions** tab and click the plus sign.
6. In the **Extension Type** column, select **S**. In the **Extension** column, type the workstation extension from the compiled Workstation list. The workstation extension is extension of the defined workstation within Interaction Administrator.
7. Repeat steps 4 through 7 for every workstation in the list.

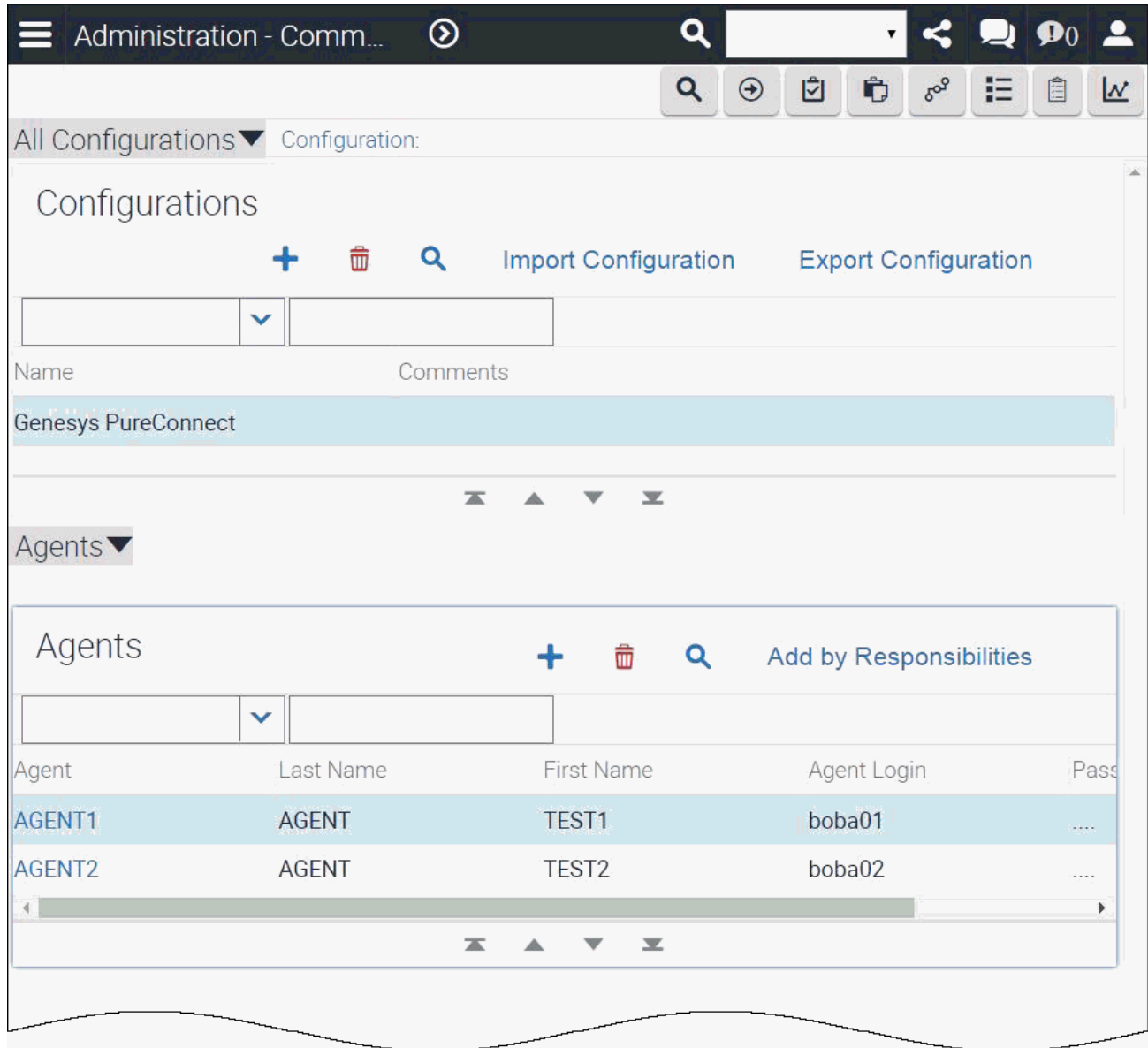
Allowing agents access to the Communication Toolbar

To give a Siebel Agent access to CIC Integration with Siebel, they must be associated with the configured communication telesets as described in [Creating telesets for agent workstations](#). After the agents are associated with the telesets, complete the following procedure.

To associate Siebel agents with the communication configuration:

1. Log on to Siebel as a Siebel Administrator and press **Ctrl+Shift+A** to open the Site Map.
2. Select **Administration Communications**, then click the **All Configurations** link.

The **Configuration** window appears.



3. Under **Name**, select the communications configuration created previously.
4. In the bottom half of the window, click the **Agents** tab and then click the plus sign.
5. Select an agent and then click **OK**.
The Communications toolbar is enabled.
6. Repeat steps 4-5 for every agent using the CIC Integration with Siebel.

Note: To add multiple agents simultaneously, use the Shift and Control buttons to select multiple agents.

7. To add large sets of users, select the **Add by Responsibilities** button and choose a group from the list of defined Siebel responsibilities that appears.

For example, click **Add by Responsibilities** and then choose **CTI Agent**. This procedure allows access to the Communication toolbar for all users defined as CTI Agent.

Setting the agents' user names

If you use the {@AgentId} value for Service:User, then each Siebel agent associated with the communication configuration must have a user name that matches their CIC user name. See the [CTI driver parameters](#) for more details.

Note: Skip this section if the values are set to {@Username}.

To set each user's Agent user name:

1. Log on to Siebel as a Siebel Administrator and press **Ctrl+Shift+A** to open the Site Map.
2. Select **Administration Communications**, then click the **Agent General Profile** link.
The Configuration:[Configuration Name] > Agent window appears.

The screenshot shows the Siebel Administration interface for 'Administration - Comm...'. The main window is titled 'Agent General Profile' and contains a table of agents. Below the agents table is a 'Configurations' section with a table of configurations.

Agent	Agent Login	Password	First Name	Last Name
AGENT1	boba01	TEST1	AGENT
AGENT2	boba02	TEST2	AGENT

Name	Comments	Primary
Genesys PureConnect		<input checked="" type="checkbox"/>

3. Is the Service:User setting set to {@AgentId}> in the [CTI driver parameters](#) section?
 - If yes, then in the **Agent** column, select the user whose password you want to set.
 - If no, then skip to the next step.
4. In the **Password** column, you do not need to provide the user's password. The system uses Proxy logons which do not require the user's actual password stored in Siebel.
5. Repeat steps 3-4 for each additional agent.

Adding status data to Siebel's reason code list of values

CIC agents can use configurable status messages to specify their status, such as "Available" or "At Lunch." Using Siebel's reason code, Siebel agents can select CIC statuses.

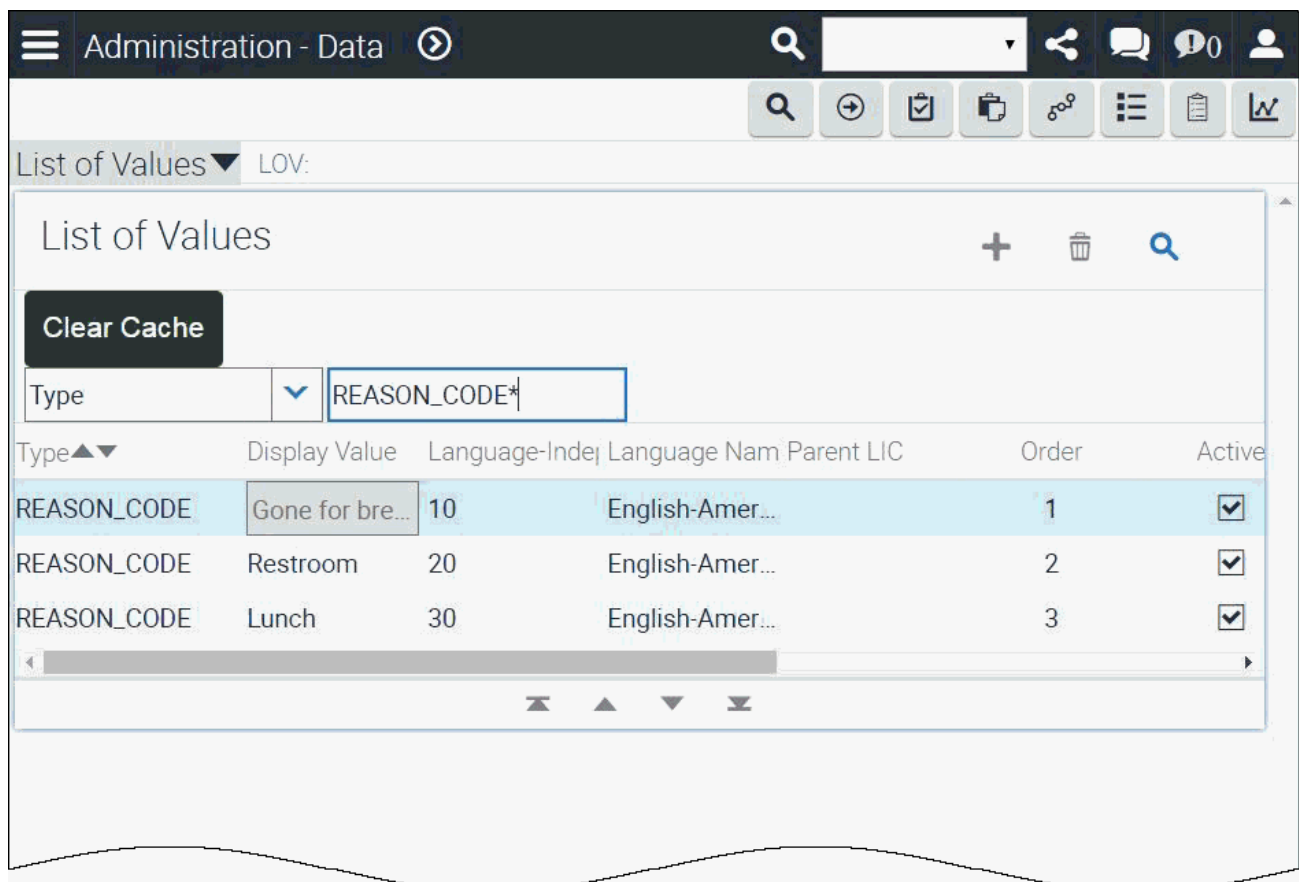
The following figure shows the CIC status data to add to Siebel's **Reason Code List of Values**.

Message Name	Message	Group
AccAgentNotAnsw...	ACD - Agent Not An...	UNAVAILABLE
At a training session	At a Training Session	TRAINING
At Lunch	At Lunch	BREAK
Available	Available	AVAILABLE
Available, Follow-Me	Available, Follow-Me	AVAILABLE
Available, Forward	Available, Forward	AVAILABLE
Available, No ACD	Available, No ACD	AVAILABLE
Away from desk	Away from desk	UNAVAILABLE
Do Not disturb	Do Not Disturb	UNAVAILABLE
Follow Up	Follow Up	FOLLOWUP
Gone Home	Gone Home	UNAVAILABLE
In a meeting	In a Meeting	UNAVAILABLE
On Vacation	On Vacation	UNAVAILABLE
Out of the office	Out of the Office	UNAVAILABLE
Out of town	Out of Town	UNAVAILABLE
Working at Home	Working At Home	UNAVAILABLE

To add status messages to Siebel's **Reason Code List of Values**:

1. Log on to Siebel as a Siebel Administrator and press **Ctrl+Shift+A** to open the Site Map.
2. Select **Administration – Data**, then click the **List of Values** link.

The LOV [List of Values] window appears.



3. Click **Query**.
4. In the **Type** column type **REASON_CODE***. Then click **OK**.

The query is completed.

5. Click **New**.
6. In the **Type** column, type **REASON_CODE**.
7. In the **Display Value** column, type the corresponding status from the **Message** column in the CIC status data.

Message Name	Message	Group
AcAgentNotAnsw...	ACD - Agent Not An...	UNAVAILABLE
At a training session	At a Training Session	TRAINING
At Lunch	At Lunch	BREAK
Available	Available	AVAILABLE
Available, Follow-Me	Available, Follow-Me	AVAILABLE
Available, Forward	Available, Forward	AVAILABLE
Available, No ACD	Available, No ACD	AVAILABLE
Away from desk	Away from desk	UNAVAILABLE

8. In the **Language Independent Code** column, type the corresponding status from the **Message Name** column in the CIC status data.

Message Name	Message	Group
AcAgentNotAnsw...	ACD - Agent Not An...	UNAVAILABLE
At a training session	At a Training Session	TRAINING
At Lunch	At Lunch	BREAK
Available	Available	AVAILABLE
Available, Follow-Me	Available, Follow-Me	AVAILABLE
Available, Forward	Available, Forward	AVAILABLE
Available, No ACD	Available, No ACD	AVAILABLE
Away from desk	Away from desk	UNAVAILABLE

9. In the **Language Name** column, select the appropriate language for reason codes.
10. In the **Order** column, type the number that indicates the sequence of the reason code relative to the other reason codes in the list.
11. Click the **Active** column.
12. Repeat steps 3-9 for each additional status.

Editing the Siebel configuration files

To explain how to modify the configuration file to enable Siebel Communication Services, this section uses the Siebel Call Center Object Manager's configuration file, **uagent.cfg** as an example. The configuration files are located in *<Siebel Installation Path>\siebsrvr\bin\ <Language Code>*.

Note: The configuration file to edit depends on the object manager being used. Each configuration file is unique to a customer because it reflects the customer-specific requirements and which Siebel solution is implemented.

To modify the configuration file:

1. Open the object manager's .cfg file.
2. Scroll down to the **Communication Administration**.

The following table describes the configuration settings. For more settings and information, see the *Siebel Communications Server Administration Guide* in the *Siebel Bookshelf*.

Configuration Setting	Description
CommEnable	Enables or disables session-based communications for agents. Value Setting: TRUE
CommSimulate	Enables or disables the Communications Simulator. Value Setting: FALSE
CommLocalDriver	Specifies the server on which the channel manager loads the CIC Integration for Siebel for each agent communications session. Value Setting: FALSE
CommLogDebug	Enables or disables logging for each agent communication session. Refer to <i>Siebel Communications Server Administration Guide</i> on setting this parameter.
CommReleaseLogHandle	Enables or disables the log file to be released periodically while the log is created. Refer to <i>Siebel Communications Server Administration Guide</i> on setting this parameter.
CommReqTimeout	Number of seconds to wait for a response from the Communications Session Manager for a specific interaction. Refer to <i>Siebel Communications Server Administration Guide</i> on setting this parameter.
CommLogFile	Name of the log file used by the Communications Session Manager. Refer to <i>Siebel Communications Server Administration Guide</i> on setting this parameter.

Siebel commands and events

The Siebel Communications Administrator allows you to configure several different kinds of communication data. The Siebel database provides sample configurations which are useful for reference purposes.

Note: The sample configurations illustrate commands and events that may be different than what you need for your configuration. They are not meant to be implemented on actual customer sites. Use them for reference purposes only.

Siebel Configuration Events are associated with screen pop actions in Siebel. These events allow for the CIC Integration with Siebel to send specific events to Siebel that result in a screen pop. Numerous Name-Value pairs are passed with each event, for example, Event Ringing, Event Connected, and Event Established. For general information on the specific events sent from the CIC Integration with Siebel, see [CTI events](#). For more information, see [Configuring screen pops](#).

Siebel Configuration Commands are associated with a button or a menu selection. These commands allow for Siebel 7.0 to send specific commands to the CIC Integration with Siebel. For example, the CIC Integration with Siebel supports the following commands:

- Log on to CTI
- Release Call
- Put Call On Hold

For detailed information on the commands and supported by the CIC Integration with Siebel, see [CTI commands](#). For more information on Siebel commands, see the *Siebel Communications Server Administration Guide*.

Events (name-value pairs)

Siebel Configuration events (CTI events) are associated with screen pop actions in Siebel. These events allow for the CIC Integration with Siebel to send specific events to Siebel to execute a screen pop. Numerous stock name-value pairs are passed along with each event to aid Siebel in screen pop execution.

This information describes the standard CTI events that are sent from the CIC Integration with Siebel. All of these CTI events use the same standard attributes, which are described in "Standard attributes for CTI events" in [CTI events](#).

For details on the data delivered with the CTI Events, see [Configuring screen pops](#).

Note: You can add custom attribute name-value pairs by setting the Driver:EventCustomAttributes parameter. You can also disable sending an event if it is not used by adding event name to the Driver:DisabledEvents setting.

CTI events

For more information about name-value pairs for the following events, see [Configuring screen pops](#).

EventRinging

The CIC Integration with Siebel sends the *EventRinging* Event when a new incoming call is alerting the Siebel Agent. This event is not sent if the Auto Answer configuration is set in Interaction Administrator for a particular user. Only the *EventConnected* event is sent in the Auto Answer mode. By sending separate events for call alerting and call connected, the screen pop can be sent at the customer's discretion.

EventConnected

The CIC Integration with Siebel sends the *EventConnected* when a new incoming call is connected with the Siebel Agent.

EventDisconnected

The CIC Integration with Siebel sends the *EventDisconnected* when a call is disconnected.

EventDialing

The CIC Integration with Siebel sends the *EventDialing* when an outbound call is in the dialing state.

Note: The EventConnected event is highly recommended for sending screen pops to the Siebel Agent. Unexpected results could occur using the EventRinging event. The EventRinging screen pop is sent while the call is alerting the agent. Because Siebel takes time to pop the specific screen, it is difficult to know when the call is connected after clicking Answer Call.

EventReqPop

The CIC Integration with Siebel sends this event to Siebel when the user requests a screen pop for the currently selected call in the work item list.

EventEstablished

The CIC Integration with Siebel sends this event to Siebel when an agent starts a new outbound call. For example, the Siebel Event Handler corresponding to this event could create a Siebel Activity for every outbound call. The CIC Integration with Siebel also sends this event to Siebel when the Interaction Dialer starts calls that are connected to a Siebel Agent.

ChatTextAdded

The CIC Integration with Siebel sends this event to Siebel when a Chat interaction has received a new message from the remote customer end.

WorkItemChangeCallSelected

This event is sent when the integration requests that a specific interaction in the list should be selected. Siebel responds to this event by selecting that interaction and delivering a command notification. This event is for internal purposes only: do not change it. If it is changed, unexpected behavior can result.

Standard attributes for CTI events

The following table describes the standard attributes for CTI events.

Parameter	Description
CallId	Unique ID of the CIC interaction
CallIdKey	Unique ID of the CIC interaction used as a unique ID of CIC's Call Detail table. This data field can be used to link between the CIC and Siebel database.
LocalTn	Agent's extension. Always set to Eic_LocalTn unless the call came through a workgroup, in which case LocalTn is set to "".
S_DNIS	DNIS. Not provided out of the box. Inform the CIC handler developer to store S_DNIS value as needed.
SiebelCall	Used to signify a call was originally sent to an internal agent. Used to send a data transfer when a call is transfer from one agent to another. Used with SiebelViewBmk
SiebelViewBmk	The bookmark of the page an agent was on before the call was transferred to another agent via Blind Transfer, Consultative Transfer, or Conference.
ANI	Caller ID
S_PhoneNumber	The phone number of the party called on an outbound call.

Note: This value is sent only on EventEstablished.

Configuring screen pops

Out of the box screen pop functionality is limited and may not meet your specific needs. To remedy this situation, the CIC Integration with Siebel can be configured to send any additional attributes stored on the interaction for use on performing a screen pop. You can configure the attributes that are delivered in addition to the stock values in the Driver:EventCustomAttributes parameter. See [CTI driver parameters](#).

When you use Interaction Attendant or Interaction Designer, these fields can store information like Customer ID number, Case ID, and Social Security Number via handlers. When you use Interaction Attendant, you can accomplish this task and it is much easier to administer. When the call reaches the Siebel client, an action needs to be associated with these generic values.

Using Siebel CTI Event handlers within the Siebel Communication Configuration you can achieve screen-pop based stock and custom attributes delivered with each event. Refer to the *Siebel Communication Server Administration Guide* in *Siebel Bookshelf* on how to implement new and existing event handlers.

By importing the Siebel Configuration provided, you have access to some screen pop functionality. For example, you can a screen pop to the contact screen based on the incoming ANI.

Note: Do not delete event handlers. Modify or add new ones instead.

CTI commands

Following are the commands and required parameters that Siebel sends to the CIC Integration with Siebel.

Note: Some commands have more parameters passed to the CIC Integration with Siebel. However, they are not required and are not listed here.

Login

Logs in the Siebel user to the CIC phone system. The following table lists the required parameters for Login.

Parameter	Description
userId	Siebel Agent's user name The Siebel Agent's user name MUST match the CIC Agent's user name. UserPin is the agent's password for the CIC phone system. If this requirement is not met, the Siebel user cannot log on to the CIC system.
Station	Siebel Agent's Teleset extension The extension of the teleset the agent is logging on to MUST match the extension of the CIC workstation. Note: This field is empty if teletests are not used. (For more installations, this field is empty.)
remoteStr	This parameter delivers the contents of the telephone box on the Siebel CTI toolbar. This value is used to define the workstation being logging on to. For more information, see Mapping agents' phones to workstations.
clientHostName	Siebel provides the host name of the workstation the agent is logging on from using the macro {@ClientHostName}. This host name is necessary Interaction Screen Recorder to work if the user does not intend on using the CIC client side-by-side with the Siebel web client.
initialStatus	This value initially sets the users status upon logon. By default it is left blank assuming the persistent status on the last logon is the initial status.

Logout

Logs the Siebel user out of the CIC phone system. No parameters are required for this command.

MakeCall

Calls another party. The following table lists the required parameters for MakeCall.

Parameter	Description
PhoneNumber	Phone number of the party to call

AnswerCall

Picks up the call alerting to the agent. This command is not enabled in an Auto Answer environment. This command has no required parameters.

PickupCall

Picks up the selected interaction. This command is much like the AnswerCall command, but allows for a specific interaction id to be provided.

Parameter	Description
TrackingID	Unique ID of the CIC interaction

ReleaseCall

Disconnects the currently selected call WorkItem. The following table lists the required parameters for ReleaseCall.

Parameter	Description
TrackingID	Unique ID of the CIC interaction

TransferMute

Blind transfers the currently selected call WorkItem to another party. The following table lists the required parameters for TransferMute.

Parameter	Description
TrackingID	Unique ID of the CIC interaction
PhoneNumber	Phone number of the party to call

TransferInit

Places the currently selected call WorkItem on hold while calling another party. The following table lists the required parameters for TransferInit.

Parameter	Description
TrackingID	Unique ID of the CIC interaction
PhoneNumber	Phone number of the party to call

TransferComplete

Transfers the original caller to the other party called in TransferInit. The following table lists the required parameters for TransferComplete.

Parameter	Description
TrackingID	Unique ID of the CIC interaction

ConferenceInit

Places the currently selected call WorkItem on hold while calling another party. The following table lists the required parameters for ConferenceInit.

Parameter	Description
TrackingID	Unique ID of the CIC interaction
PhoneNumber	Phone number of the party to call

ConferenceComplete

Places the Siebel Agent, the original caller, and the other party called in ConferenceInit into a conference call. If the original call is actually an existing conference call, the other party is added as a new party to this conference call. The following table lists the required parameters for ConferenceComplete.

Parameter	Description
TrackingID	Unique ID of the CIC interaction

RetrieveCall

Places the currently selected call WorkItem on hold while retrieving the other call. This command is used after starting a consult transfer or conference call. The following table lists the required parameters for RetrieveCall.

Parameter	Description
TrackingID	Unique ID of the CIC interaction

HoldCall

Places the currently selected call WorkItem on hold. The following table lists the required parameters for HoldCall.

Parameter	Description
TrackingID	Unique ID of the CIC interaction

UnHoldCall

Resumes the currently selected call WorkItem. The following table lists the required parameters for UnHoldCall.

Parameter	Description
TrackingID	Unique ID of the CIC interaction

RecordCall

Starts an ad-hoc recording of the currently selected call WorkItem. The following table lists the required parameters for RecordCall.

Parameter	Description
TrackingID	Unique ID of the CIC interaction

UnRecordCall

Stops an ad-hoc recording of the currently selected call WorkItem. The following table lists the required parameters for UnRecordCall.

Parameter	Description
TrackingID	Unique ID of the CIC interaction

PrivateCall

Assigns the private tag to the currently selected call WorkItem. The following table lists the required parameters for PrivateCall.

Parameter	Description
TrackingID	Unique ID of the CIC interaction

UnPrivateCall

Removes the private tag for the currently selected call WorkItem. The following table lists the required parameters for UnPrivateCall.

Parameter	Description
TrackingID	Unique ID of the CIC interaction

MuteCall

Mutes the currently selected call WorkItem. The following table lists the required parameters for MuteCall.

Parameter	Description
TrackingID	Unique ID of the CIC interaction

UnMuteCall

Unmutes the currently selected call WorkItem. The following table lists the required parameters for UnMuteCall.

Parameter	Description
TrackingID	Unique ID of the CIC interaction

ChangeNotReadyState

Changes the current CIC Status of the user. If no parameters are passed, the user status switches between the configurable **Available** type status and the configurable **Do Not Disturb** type status. For more information, see [CTI driver parameters](#).

The following table lists the required parameters for ChangeNotReadyState.

Parameter	Description
ReasonCode	(Optional)

WorkItemChangeCallSelected

Siebel sends a notification to the CIC Integration to Siebel when the user has selected a different call WorkItem in the WorkItem list. The following table lists the required parameters for WorkItemChangeCallSelected.

Parameter	Description
TrackingID	Unique ID of the CIC interaction

RefreshToolbar

Refreshes the Communication button's current configuration, based on the currently selected call WorkItem. There are some instances when the CIC phone system may be out of sync with the toolbar.

Note: Out of the box, this command is only available in the Communications menu.

The following table lists the required parameters for RefreshToolbar.

Parameter	Description
TrackingID	Unique ID of the CIC interaction

SendScreenPop

Allows the user to request a screen pop at any time. It takes the currently select call WorkItem, generates the screen pop, and sends it to Siebel through the *EventReqPop* Event. SendScreenPop can only be sent while a call is selected. The following table lists the required parameters for SendScreenPop.

Parameter	Description
TrackingID	Unique ID of the CIC interaction

ResetSession

Resets the existing session for this user. Use this command to reset a session that has become unresponsive or during a client session when a user is already logged on to Siebel. The following table lists the required parameters for ResetSession.

SecureRecordingPause

Starts the secure recording pause so that an agent can receive secure information from a caller and ensure that no secure information is logged (for example, social security number, credit card number, and so on).

Parameter	Description
TrackingID	Unique ID of the CIC interaction

SecureRecordingUnpause

Stops the secure recording pause and resumes quality monitoring.

Parameter	Description
TrackingID	Unique ID of the CIC interaction

RequestEvent

Causes the CIC Integration with Siebel to respond with a CTI event using the Event parameter with the standard attributes. This command allows an agent to request a specific event to reoccur. For example, the agent can request that the original interaction delivery screen pop to reappear (the event used in this example is EventConnected).

Parameter	Description
TrackingID	Unique ID of the CIC interaction
Event	Name of the event to request

ShowTransferDialog

Opens the CIC client's **Transfer** dialog box for the selected interaction. The **Transfer** dialog box appears over the top of the Siebel web client.

Parameter	Description
TrackingID	Unique ID of the CIC interaction

ShowInteractionClient

Brings the CIC client to the forefront of the user's screen.

ShowDialpad

Displays the CIC client dial pad.

ShowAssistanceDialog

Displays the CIC client **Assistance** dialog box.

Parameter	Description
TrackingID	Unique ID of the CIC interaction

SetAttribute

Sets a list of attributes on the specified interaction.

Parameter	Description
TrackingID	Unique ID of the CIC interaction
<ATTRIBUTE VALUE>	<p>All of the parameters provided when executing this command are set on the selected interaction:</p> <ul style="list-style-type: none"> • The Parameter name equates to the Interaction Attribute name. • The Parameter value is the value stored for the Interaction Attribute. <p>As a result, numerous attributes can be set with one execution of the SetAttribute command.</p>

Additional configuration

Creating a CIC super user

In the integration, a super user acts “behind the scenes” to perform actions initiated by a Siebel agent. You create the super user account in Interaction Administrator, and CIC uses the super user to accomplish all agent activity. The super user performs special actions an agent would not be able to perform. For example, retrieving the Siebel Bookmark on an intercom transferred interaction and proxying an agent’s logon without the password.

Setting up and enabling the super user

Create a super user account to allow the Siebel Agent to use the integration.

1. In Interaction Administrator, create a user account called **SiebelSU**.
2. Open the super user's properties.
3. On the **Security** tab, click the **Access Control** button.
4. Under **Misc Items**, for **Proxy Logins**, select **View**.

The screenshot shows the 'Access Control' window with the following details:

- Category: <All>
- Search: Proxy
- Checkbox: Show only selected items and groups
- Table with columns: Name, View, Modify, Monitor, Search, Delete, Create, Statistics, View Histor
- Section: **Misc Items**
- Row: Proxy Logins (View checkbox is checked)

5. Under **User Queues**, for **All**, select **View**.

The screenshot shows the 'Access Control' window with the following details:

- Category: <All>
- Search: User Queue
- Checkbox: Show only selected items and groups
- Table with columns: Name, View, Modify, Monitor, Search, Delete, Create, Statistics, View Histor
- Section: **User Queues**
- Row: *[All] (View checkbox is checked)

6. Under **Station Queues**, for **All**, select **View**.

The screenshot shows the 'Access Control' window with the following details:

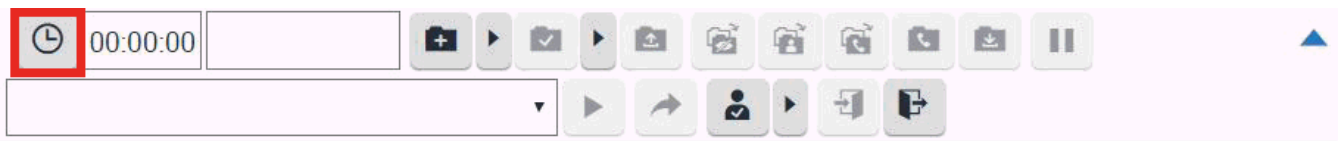
- Category: <All>
- Search: Station Queue
- Checkbox: Show only selected items and groups
- Table with columns: Name, View, Modify, Monitor, Search, Delete, Create, Statistics, View Histor
- Section: **Station Queues**
- Row: *[All] (View checkbox is checked)

The last task for utilizing the super user is setting the user name and password in the CIC Integration with Siebel driver settings. For more information, see [CTI driver parameters](#).

Customizing Siebel queue time



The Siebel Queue Time icon is on the Siebel Communication toolbar.



When the Siebel agent hovers over this icon, the toolbar displays the total system time that the inbound call has been in the queue. System time is calculated as the time the call is first connected to the time the Siebel Agent accepts the call work item.

If the wanted time display for the Siebel Queue Time is not the CIC system time, you can override this value by modifying handlers. For each call, a name-value pair is stored on the call for the CIC system time. The name of the call attribute is *S_QueueTime*. If this value is empty by the time the call is connected with the Siebel agent, the CIC Integration to Siebel generates based on the CIC system time. On the other hand, a CIC-certified handler developer could set the *S_QueueTime* variable to a defined value based on the customers' requirements. For example, *S_QueueTime* could be set to the actual time the call was waiting in the last queue.

Consider this handler customization scenario:

1. A customer calls into CIC.
2. The customer enters their SSN or customer number.
3. The system routes the customer to the Sales workgroup.
4. The moment the call enters the Sales workgroup queue, the start point time stamp is stored with the call.
5. The call eventually routes to a Siebel Agent. Before alerting the agent with the customer call, the system stores the end-point time stamp with the call.
6. The difference between the start point time stamp and end-point time stamp is stored in the *S_QueueTime* variable for the call.
7. The Siebel Agent sees this value by hovering over the clock icon on the toolbar.

Note: (for CIC certified handler developer) The *S_QueueTime* variable MUST be stored before the caller picks up the call. If not, the CIC Integration to Siebel generates the CIC system time and this value is used the Siebel Queue Time display.

Switchover support

The integration supports switchover environments. The following scenario illustrates the sequence of events that occurs when a switchover occurs on the phone system.

1. Switchover Server A experiences a switchover event.

All currently logged on Agents are logged out of the toolbar. The Agents see a message that the phone server has gone down. The **Login** button becomes the only button available on the toolbar.

2. Switchover Server B becomes the primary server. This typically happens instantaneously.
3. The agents can click **Login** to log on to Switchover Server B.

Troubleshooting

If issues develop that suggest a problem in CIC Integration with Siebel, technical support staff typically request log and trace files. The following sections describe ways to troubleshoot CIC Integration with Siebel problems.

Increasing log levels

To obtain more logging information, turn logging up to a higher level. Use the `inintraceconfig.exe` utility, which was included in the CIC Integration to Siebel installation.

1. Open Program Files, then open PureConnect, and select **Trace Configuration Utility**.
2. Select **siebmtshmw**.
3. Select the following sub-items: **ININ.Integrations.Siebel** and **ININ.Integrations.Siebel.Impl**. Set the levels to **Notes** or above. Depending on the issue, Customer Care personnel may also ask you to turn up the logging volume for IceLib.
4. Open the **Tools** menu and choose **Set Trace Level**. If a log location does not exist, select a location following the same format for Customer Interaction Center platform logging. A folder is created for each day of the week. Logs exist for up to seven days at any time.

Retrieving trace logs

1. Open Program Files, select PureConnect, and then select **Log Viewer Utility**.
2. Select the **siebmtshmw.ininlog** log, which is located in the Sink Configuration location that was specified in the `TraceConfig.exe` utility. Review the log for any warnings or error messages.
3. Contact your reseller or your Customer Care representative if you cannot find the log file, if there are no error messages, or if you cannot understand the error code and message. Send the following information:
 - All `siebmtshmw.ininlog` files for the day
 - Explanation of the problem
 - Time in which the problem occurred
 - Agent with which the error occurred
 - CallId of the call that corresponds to the problem, if applicable

Appendix B: Siebel Integration FAQs

General Features

What interaction types does the integration support?

In CIC 4.0, the integration supports Calls, Emails, Web Chats, Callbacks, and Generic Objects. The Interaction Client is required to be running side by side the Siebel web client to interact with the media portion of Emails, Web Chats, and Callbacks. For example, email alerts an agent and they pick up the email through the Siebel toolbar. The Siebel toolbar will tell the Interaction Client to open the Email Response form. The same is true for Web Chats and Callbacks. Generic Objects have no UI

For CIC 4.0, do we store the details of the ININ Email/Web Chat in the Siebel activity?

Not currently. There is an open enhancement request to add this to the CIC 4.0. It is possible this can be done by PSO as a customization.

Do you integrate with Siebel Email Response or Oracle Web Chat?

Not at this time. We are researching Siebel Email Response for the future. This would allow Siebel to handle the email while we handle the routing aspects in our Universal Queuing ACD Engine.

What are Siebel Commands and Events referred to in the documentation?

Siebel Buttons call Siebel Commands. They don't directly relate to the Events. Commands are actions they want to take on an interaction or the integration itself. For instance, make call, pickup, hold, transfer, login are all commands.

Siebel Events are events that are raised by our integration. These events are to alert Siebel when something has occurred in our system. For example, New Call Alerting, Call Connected, Call Disconnected. These events are received by the Siebel system and can be used by the cause some resultant behavior like a screen pop. Siebel administrators can configure Siebel Event Handlers to receive these events to screen pop and automatically create objects like an Activity.

Does the integration support Single Sign On (SSO)?

No, not directly. Siebel allows for auto logging in, but this only works if Siebel Telests are used. See the Siebel Integration implementation guide for more details on Telesets.

Users have to be provisioned in both systems. The usernames do not need to match though. Siebel has the ability to override the username supplied at login. This is configured within the Siebel Agent General Profile configuration.

In CIC 4.0, the integration no longer requires the CIC user's password to be stored in Siebel. We now have the ability to proxy user's logins without their password.

Does the integration support switchover?

Yes. Assuming the integration has connected to the primary prior to switching, it gets the current back and will attempt to automatically reconnect to the backup on a switch event.

Can the integration be used with SIP Softphone?

Yes, but the SIP Softphone must be installed locally using the Interaction Desktop installation. When logging in, the user needs to support the workstation name configured within Interaction Administrator.

Can outbound calls be made on behalf of a Workgroup?

No, not currently. There is an enhancement open to add on behalf workgroup name in the MakeCall command sent from Siebel to our integration.

Is Screen Recorder supported with the Siebel Integration even if I am not running Interaction Desktop?

Yes, in an early CIC 3.0 SU. Confirm the Siebel Commands for Login, LoginRemote are sending the ClientHostName parameter as follows:

```
Param.ClientHostName = "{@ClientHostName}"
```

Can you run the Interaction Client side by side the Siebel integration?

Yes. It is required to respond to Email, Web Chats, and Callbacks interaction types.

Can a user log into Siebel and enter both a Remote Station and a Remote Number at the same time?

No. Remote Station with a Remote Number is not supported within the Siebel integration itself. However, if the user first logs in to Interaction Desktop using Remote Station and Remote Number and then logs in to Siebel and clicks the login button on the toolbar (leave the box empty) the integration will be able to piggyback off of the Interaction Desktop session.

Does the integration support Siebel Open UI?

Yes

Do we integrate Siebel with Interaction Dialer?

No, not currently.

The integration can run Interaction Scripter side by side the Siebel Web Client. Siebel will show the outbound call and is capable of screen popping on outbound calls.

Can multiple Siebel instances point to the same CIC server?

Yes, each Siebel instance would be independently installed, configured, and integrated with the CIC server. Note that an obvious caveat would be that a single CIC agent should not be connecting to multiple Siebel instances as usability issues would occur.

Screen Pop

What screen pops do we support out of the box?

The Siebel architecture is very customizable to create just about any screen pop behavior desired. This configuration is done completely through Siebel. With each customers being different in their needs, our out of the box configuration only screen pops to a Contact Screen based on the ANI.

How do screen pops work with Siebel?

The Siebel integration send Siebel's Communications Session Manager numerous Siebel events during the interaction. These include EventRinging, EventConnected, and EventDisconnected for inbound calls as well as EventDialing, EventEstablished, and EventDisconnected for outbound calls.

With each of these events the integration delivers numerous standard interaction attributes as well as configurable customer specific attributes. Standard interaction attribute include things like CallId, CallIdKey, ANI, DNIS, Time in Queue. The configurable customer attributes are defined as part of the implementation.

Siebel receives this event, uses Siebel Event Handlers and Responses to drive screen pop experience. The Event Handler matches the event and data and then executes an Event Response which would drive the agent's desktop to a specific screen. An additional component is the Siebel Event Log which can create objects like Siebel Activities to track the work performed by the Agent. Siebel Event Handlers, Responses, and Logs are all configured and maintained within Siebel. Interactive Intelligence highly suggests you consult with a certified Siebel consultant for the configuration, maintenance, and setup of these items. Please refer to the Siebel Communications Administration Guide for more details.

What interaction types do you support screen pop for?

In CIC 4.0, Calls, Emails, Web Chats, Callbacks, and Generic Objects.

Does Siebel support doing differing screen pop based on one, many, or no matches?

Yes. This is configured within the Siebel Event Handler/Response configuration.

Is the screen pop transferred to another agent if the customer is transferred?

Yes. The Siebel integration delivers the agents screen to the agent receiving the interaction once the transfer is completed.

When is the screen pop delivered? Ringing or Connected? Is it configurable?

It is configurable by setting the Siebel Event Handler to listed to EventRinging vs EventConnected. Out of the box it is configured to deliver on EventConnected. We suggest keeping it on EventConnected because the Siebel CTI Toolbar will be locked an unresponsive during a screen pop. If it is configured to deliver on Ringing, this can cause the agent to miss picking up the interaction.

Versioning

What versions of Siebel are supported? Is our integration different for version 7 and 8?

Siebel 7.X, Siebel 8.X, Siebel Innovation Pack 2014, Siebel Innovation Pack 2015, Siebel Innovation Pack 2016, Siebel Innovation Pack 2017, and Siebel Innovation Pack 2018

Our integration is the same for the Siebel versions. Siebel did not make modifications to their Integration Architecture between the 7.X and 8.X versions.

What versions of CIC do we support?

We have support Siebel 7.X/8.X since CIC 2.1. The integration uses ClientCOM under the covers, but we do not require the customer purchase the ClientCOM license.

Siebel integration support for CIC 4.0 was released in SU3. The integration is now based on IceLib. We also do not require a customer to license IceLib in order to use the Siebel integration.

Is Siebel permitted for use in CaaS?

Check with PureConnect Cloud Solutions Management for the latest details. We do not plan to support CIC 3.0 since the architecture is based on ClientCOM which is not efficient enough to work over an MPLS WAN. With the change in architecture for 4.0, the intent is to allow Siebel integration to be sold in CaaS once it is released.

Does our integration work with Siebel OnDemand (Hosted) version?

No. Siebel OnDemand does not support CTI vendors like ourselves in their cloud version since the integration must directly run on the Siebel Architecture.

Is Siebel 2000 supported?

No. We dropped support for Siebel 2000 starting with CIC 3.0. It was last supported in CIC 2.4.

Does Siebel have a license that must be purchased in order to use our integration at a specific site?

Yes, it is called Siebel CTI. Excerpt from Siebel licensing regarding Siebel CTI:

"Siebel CTI provides integrated inbound, outbound, and transfer call routing based on comprehensive information about the customer, agent, channels, and service level agreements, ensuring optimal productivity for each customer interaction. Siebel CTI helps decrease call times and improve customer intimacy. It supports off-the-shelf integration with popular CTI middleware providers to provide integrated call handling, call tracking, and automated screen pop capabilities with a broad variety of Automated Call Distributors (ACDs). Siebel CTI includes Siebel Adaptive Communications API, a framework that supports the ability for middleware vendors, systems integrators, consultants, and customers to integrate additional third-party middleware applications and leverage the features of Siebel CTI."

Licensing/Certification

Are we Siebel certified?

Our certification from Oracle has expired in 2019 and needs to be renewed

How is it licensed?

It is licensed by CIC server, not by user. The backup server (or switchover) is included in this license.

What level of partner is Interactive Intelligence with Oracle?

Interactive Intelligence is Worldwide Gold partner. We have been a Siebel and Oracle partner for many years originating due to Oracle DB reporting needs.

Supported Environments

Do we support a Unix based environment?

Yes and no. Our integration can only be installed on a windows based OS. If the customer is running in a Unix based Siebel environment, they can deploy one additional server in the Siebel environment which is Windows based. This server only needs to run the minimum services to be part of the Siebel Enterprise along with the Siebel Communications Session Manager. The CommSessionMgr parameter needs to be specified in the Siebel CTI Configuration since the Communications Session Manager will not be running on the same machine with the Siebel Application Object Manager. Consult a Siebel certified resource for further information.

Is a separate "integration server" always required?

In most configurations with less than 500 users, the Siebel integration can reside on the Siebel server already running the Siebel Application Object manager (and Siebel Communications Session Manager). For most companies with more than 200 users prefer to have the Siebel Communication Session Manager (and the integration components) to be running on their own set of servers.

Is it recommended to have the Siebel Comm Session Manager to be run on the same machine as the Siebel Application Object manager?

There are many things that should be taken into consideration in making this decisions. If you have a large contact center, it is suggested to run a separate server for Comm Session Manager and the Application Object Manager. It is also suggested to deploy the Comm Session Manager if there are multiple servers used (in a load balance fashion) for the Application Object Manager. There should be the same number of servers running the Comm Session Manager as there are for the Application Object Manager in the load balance configuration. For example, if you have two Application Object Manager servers, you should have two Comm Session Manager servers.

Change Log

The following table lists the changes to the *CIC Integration to Siebel Installation and Configuration Guide* since its initial release.

Date	Changes
01-June-2012	Reformatted and updated content.
27-March-2013	Reformatted, updated content, and edited.
27-May-2014	At the end of the "Importing the InteractiveIntelligence.def File" section, added the location of the file. Updated copyrights and made other minor formatting tweaks.
10-September-2014	Incorporated changes required in the transition from version 4.0 SU# to CIC 2015 R1, such as updates to product version numbers, system requirements, installation procedures, references to Interactive Intelligence Product Information site URLs, and copyright and trademark information.
01-December-2014	Added requirement for Siebel CTI license. Applied updated template and reformatted content.
15-December-2014	Removed outdated Windows server requirement.
19-January-2015	Updated copyright page to 2015. Updated 2015 R1 references to R2.
30-March-2015	Updated 2015 R2 references to R3. Reapplied template and updated copyright page. Replaced in-line graphics with text. Updated documentation to reflect the addition of the CIC client.
26-June-2015	Updated CIC Integration with Siebel Architecture image. Updated 2015 R3 references to R4.
16-September-2015	Updated 2015 R4 references to 2016 R1. Removed references to retired Interaction Client .NET Edition.
24-November-2015	Updated CIC documentation library references to http://help.inin.com . Updated 2016 R2 references to 2016 R2.
22-June-2017	Added Innovation Pack versions to "Siebel Integration server/Siebel server" section.
24-July-2017	Corrected name of a parameter passed by RequestEvent. The correct parameter name is Event, not EventName.
11-May-2018	Rebranded from Interactive Intelligence to Genesys.
19-December-2018	Updated for Siebel 2018.
13-June-2019	Reorganized the content only, which included combining some topics and deleting others that just had an introductory sentence such as, "In this section...".
27-January-2020	Added new topic: Appendix B: Siebel Integration FAQs.