



PureConnect®

2018 R5

Generated:

12-November-2018

Content last updated:

07-August-2017

See [Change Log](#) for summary of changes.



CIC Integration to Siebel

User's Guide

Abstract

This guide describes how users can manage communications in 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.

Table of Contents

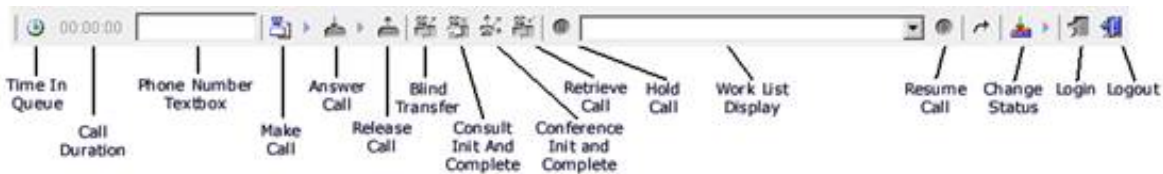
Table of Contents	2
Overview	3
Communications toolbar	4
Administrative functions	5
Logon	5
Workstation logon	5
Dynamic remote number logon	5
Logout	5
Change status	5
Stop receiving calls (non-specific status)	6
Resume taking calls (non-specific status)	6
Change to specific status	6
Stop taking calls (specific status)	6
Resume taking calls (specific status)	7
Scenario: changing your status at the end of your shift	7
Managing communication	8
Work item list display	8
Currently connected call	8
Call suspended	8
Consultative init or conference init	9
Call duration clock	9
Time in queue	9
Make call	9
Answer call	10
Release call	10
Blind transfer	10
Consult transfer init and consult transfer complete	10
Consult transfer init	10
Consult transfer complete	10
Conference init and conference complete	11
Conference Init	11
Conference complete	11
Multi-way conferencing	11
Retrieve call	11
Hold call	11
Resume call	11
Change log	12

Overview

Welcome to CIC Integration with Siebel (supporting Siebel 7.X and Siebel 8.X), a telephone and communication manager. The CIC Integration with Siebel offers the same functionality as your office telephone. In addition, it is integrated with the Siebel client so you can focus on the computer monitor and do not need to use the telephone.

Communications toolbar

You use the Siebel Communications Toolbar to access all of the features provided by Siebel and the CIC Integration.



Each of the buttons in the Siebel Communications Toolbar can have multiple states:

- **Enabled** – The button’s functionality can be performed. The button image appears in color and has a box around the image when the mouse cursor is over it.
- **Unavailable** - The button’s functionality is not available. The button image is a faint gray. It does not change when the mouse is over it.
- **Blinking** - The button’s background alternates between pressed and released. The **Answer Call** button is the only button that blinks to indicate that you have an incoming call to answer.
- **Selected** - The button’s background appears permanently pressed.

Administrative functions

This section describes the administrative functions that the user can access from the Communications Toolbar.

Logon

If you are already logged on to the CIC client, or if telesets are configured for your location, leave the text box empty and click the logon button.

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.

To log on remotely, see [Workstation logon](#).

The Siebel Communications Toolbar supports one browser session by default but can be configured to allow more concurrent sessions. If the maximum number of sessions allowed by Siebel is exceeded, you won't be able to log in to another toolbar session.

Workstation logon

1. To logon to a standard or remote workstation, type the name of the workstation in the text box on the Communications Toolbar.
2. Click the logon button.

Note: Siebel recognizes what is typed in the textbox only if the cursor is in the textbox when you click the logon button.

Dynamic remote number logon

1. In the text box, type the phone number.
2. At the end of the number, add the following characters:
 - /R for a remote logon
 - /R/P for a remote persistent connection
3. Click the logon button.

For example, suppose you want to log on remotely to the phone number (317) 872-3000 and you want a persistent connection. In this case, type **3178723000/R/P** in the box. For a remote *without* a persistent connection, you would type **3178723000/R**.

Note: Dynamic Remote Number logins require special privileges, which are assigned by the system administrator.

Logout

Click the logout button to log out of the phone system. After you log out, the **Logon** button is available.

Note: The Logout button does not close Siebel.

Change status

Click the status button to change your status. Your status determines whether calls are routed to you. All statuses are categorized as either **Available** or **Do Not Disturb**. You can use a non-specific status or a specific status. Specific statuses indicate why you are available or not; non-specific statuses indicate your status without giving any further details.

Note: You can change to a non-specific status or a specific status anytime you are logged on to Siebel.

Stop receiving calls (non-specific status)

To stop receiving calls with a non-specific status:

1. Click the status button during or after a call.

Your agent status changes to a Do Not Disturb type state. The Change Status button changes to a selected state.

Resume taking calls (non-specific status)

To resume calls with a non-specific status:

1. Click the status button.
 2. Your agent status changes to an Available type state. The **Change Status** button changes to an Enabled type state.
-

Change to specific status



1. To change to a more specific status, click the phone button.
-

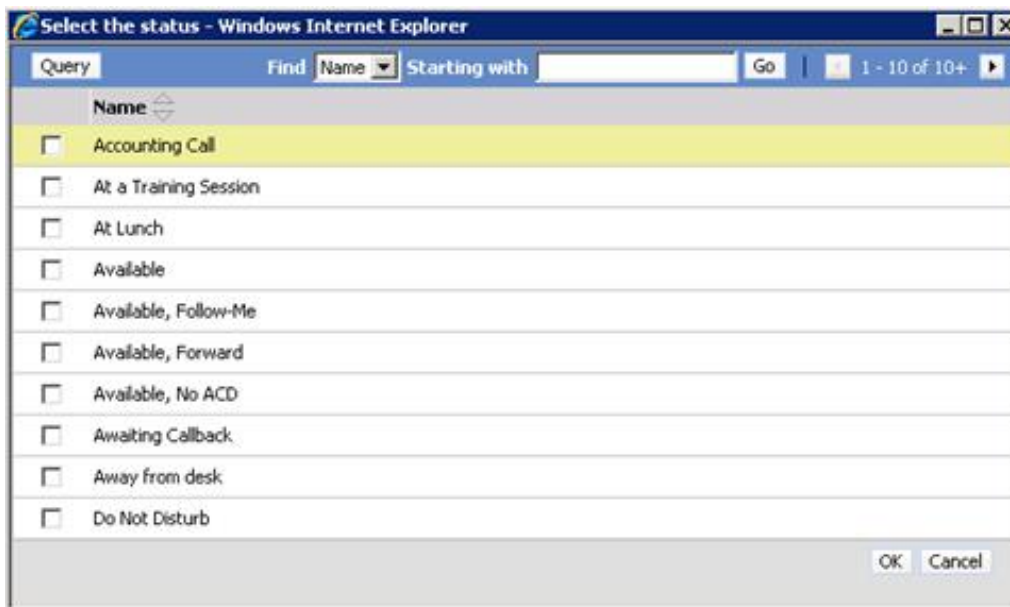
Stop taking calls (specific status)

You can stop taking calls by selecting a specific status.

To stop taking calls with a specific status:

1. Next to the **Change Status** button click the small right arrow.
2. Click the phone button.

The Select the status window appears.



3. In this window, click the check box for the specific status you want and then click **OK**. For example, at lunchtime you could select the **At Lunch** status.

The Change Status button changes to a Selected type state because this status is a Do Not Disturb type status.

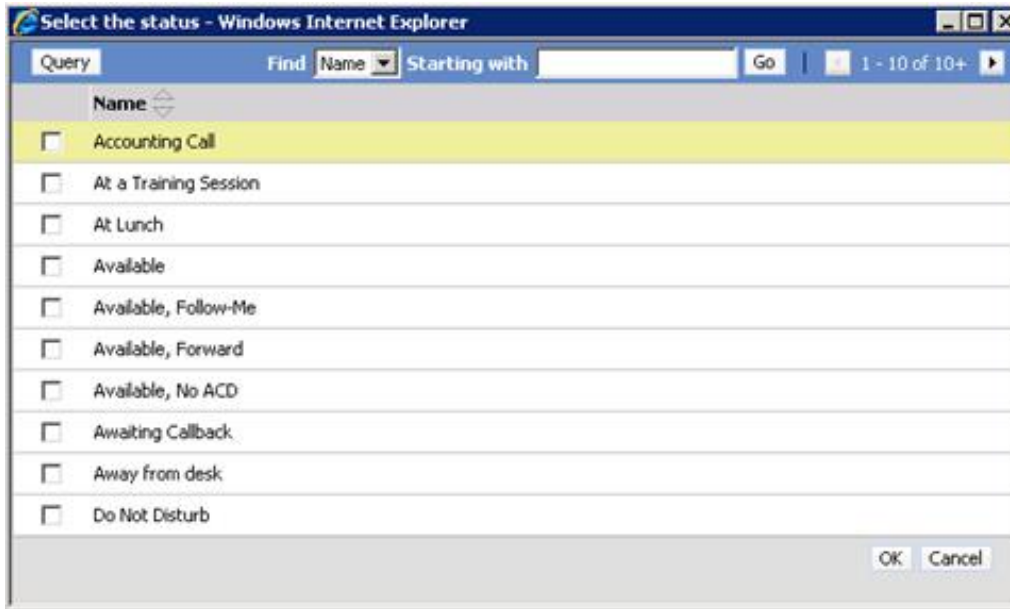
Resume taking calls (specific status)



To resume calls with a specific status:

1. Next to the **Change Status** button, click the small right arrow.
2. Click the phone button.

The Select the status window appears.



3. In this window, select the check box for the specific status you want and then click **OK**. For example, if it is time to return to work, select **Available**.

The Change Status button changes to an Enabled type state because this status is an Available type status.

Scenario: changing your status at the end of your shift

Suppose that you are on the last call before of your shift. You do not have time to take any more calls, but because you are on a call, you do not have the time to select the specific Gone Home status. To prevent another call from being routed to you, complete the following steps:

1. Click the status button.
Your status changes to a Do Not Disturb type status.
2. Complete your current call. Because your status is of the Do Not Disturb type, you cannot receive another call.
3. After you have completed the call, click the right arrow next to the **Change Status** button.
4. Click the phone button.
The Select a Status window appears.
5. Select the **Gone Home** check box and then click **OK**.
6. Click **Logout** and exit Siebel.

Managing communication

You can use the Siebel Communications Toolbar to manage all calls currently in your user queue.

Work item list display

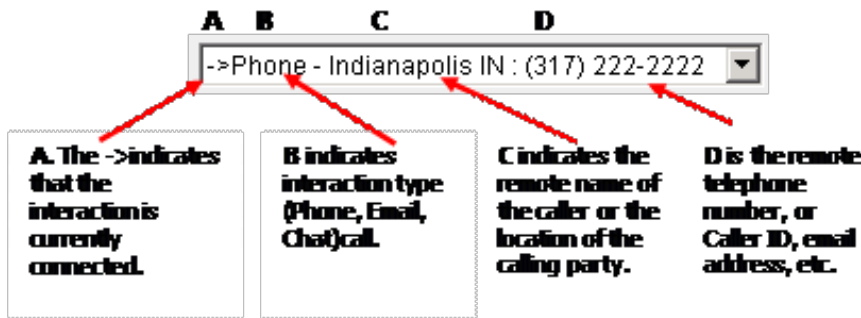


The Work Item List display is the most crucial piece to the Siebel Communications Toolbar. It allows you to work with multiple interactions and view details about the interactions.

A work item selected in the work item list can have many different states. The following sections describe the possible states.

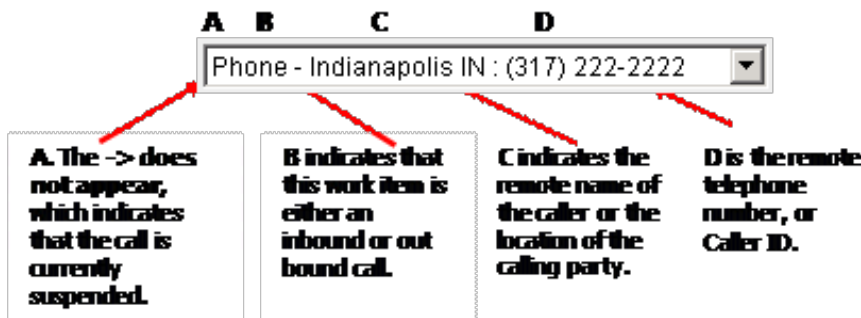
Currently connected call

The following example illustrates how the phone box displays information for a call that is connected.



Call suspended

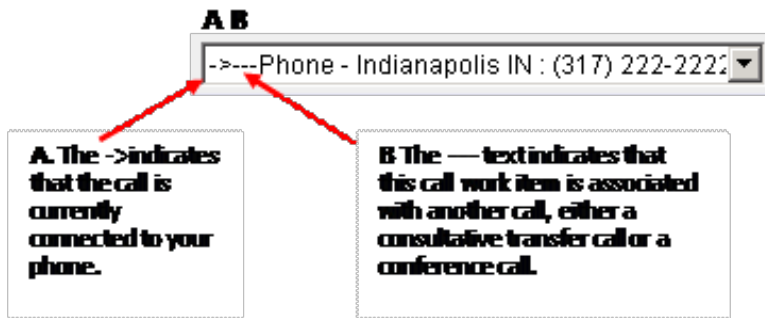
The following example illustrates how the phone box displays information for a call that is suspended.



To resume this call, use the Resume Call button.

Consultative init or conference init

The following example illustrates how the phone box displays information for a call that is associated with an outbound call.



Note: When you use the Consultative Transfer Init or Conference Init button, the current call is put on hold and an outbound call is made.

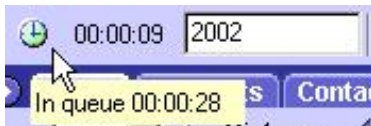
Call duration clock

The call duration clock shows the elapsed time of the call that is selected. The clock starts when an inbound or outbound call is first connected.

When you select a call that is on hold, the Call Duration Clock appears unavailable until you resume the call via the **Resume Call** button. When you resume a held call, the Call Duration Clock shows the total time this call has been in the connected state plus the time the call has been in the held state.

Time in queue

The clock button shows the time an incoming call was in the phone system before it was connected to your phone. To see the time your current call was in the queue, move your mouse over the button.



Note: Your system administrator configures how the Total Time in Queue is determined. Contact your system administrator for more information.

Make call

You can use the make call button to make an outbound call to a remote party. The phone number sent to the phone system is based off many criteria. For example, the following are three possible ways that a call could be handled:

1. You could type a phone number in the **Phone Number** box. In this case, the call is routed to that number.
2. You could leave the **Phone Number** box empty and select a Siebel Contact instead. In this case, the call is routed to the contact's work phone number.
3. You could leave the **Phone Number** box empty and not select a Siebel Contact. In this case, the **Employee List** window appears. You can select an employee from this list. Then the call is routed to the employee's number.

Contact your System Administrator for the exact functionality that is available at your location.

Answer call

The phone button blinks to notify you when a new call is available for you. To accept the call, click the phone button or pick up the telephone. The button is unavailable after the call is connected.

Note: You can click the phone button to answer non-ACD calls only. If the Auto Answer option is set, then you cannot use this button.

Release call

Click the disconnect button to disconnect the call that is selected in the Work Item list. If two or more calls are in the Work Item list and you disconnect one of them, the other call is automatically selected in the Work Item list. Each button's status changes to reflect the current state of the new selected call. If the call is on hold, it remains on hold until you click **Resume Call** to resume the call.

Blind transfer

Click the blind transfer button to blind transfer the selected call to a remote party.

The phone number sent to the phone system is based off many criteria. For example, the following are three possible ways that a call could be handled:

1. You could type a phone number in the **Phone Number** box. In this case, the call is routed to that number.
2. You could leave the **Phone Number** box and select a Siebel Contact instead. In this case, the call is routed to the contact's work phone number.
3. You could leave the **Phone Number** box empty and not select a Siebel Contact. In this case, the **Employee List** window appears. You can select an employee from this list. Then the call is routed to the employee's number.

Contact your System Administrator for the exact functionality that is available at your location.

Consult transfer init and consult transfer complete

Depending on the state of the selected call, you can use the consult transfer button to perform two separate operations.

Consult transfer init

Click the consult transfer button to place the current connected call on hold while you place an outbound call.

The phone number sent to the phone system is based off many criteria. For example, the following are three possible ways that a call could be handled:

1. You could type a phone number in the **Phone Number** box. In this case, the call is routed to that number.
2. You could leave the **Phone Number** box and select a Siebel Contact instead. In this case, the call is routed to the contact's work phone number.
3. You could leave the **Phone Number** box empty and not select a Siebel Contact. In this case, the **Employee List** window appears. You can select an employee from this list. Then the call is routed to the employee's number.

Contact your System Administrator for the exact functionality that is available at your location.

Note: You can click the consult transfer button for an inbound or outbound call.

After the outbound call connects, a new call appears in the **Work Item** list with "----" at the beginning of the call work item because the call is in the process of being consultative transferred to this party. The **Consult Transfer Init** button is now the **Consult Transfer Complete** button.

Consult transfer complete

Click the consult transfer button to transfer the original party to the outbound call. After the consultative transfer is complete, both calls are removed from the **Work Item** list.

Conference init and conference complete

Depending on the state of the selected call, you can use the conference button to perform two separate operations.

Note: You can click the conference button for an inbound or outbound call.

Conference Init

Click the conference button to place the current call on hold while you make an outbound call.

The phone number sent to the phone system is based off many criteria. For example, the following are three possible ways that a call could be handled:

1. You could type a phone number in the **Phone Number** box. In this case, the call is routed to that number.
2. You could leave the **Phone Number** box and select a Siebel Contact instead. In this case, the call is routed to the contact's work phone number.
3. You could leave the **Phone Number** box empty and not select a Siebel Contact. In this case, the **Employee List** window appears. You can select an employee from this list. Then the call is routed to the employee's number.

Contact your System Administrator for the exact functionality that is available at your location.

After the outbound call is initialized, a new call appears in the **Work Item** list with "---" at the beginning of the new work item. These characters indicate that the call is conferencing in the original party. The **Conference Init** button becomes the **Conference Complete** button.

Conference complete

Click the conference button to bring the original party and other party into a conference call. If the original party is actually a conference call in progress, the other party is added as a new party to the existing conference call. After completing the conference, both calls are removed from your **Work Item** list and a new conference work item appears.

Multi-way conferencing

If you are part of a three-way conference and want to add more parties to the conference, click the conference button to make the initial outbound call. Click the conference button again to add the new party to the existing conference call.

Retrieve call

You can use the retrieve call button during the Consult Transfer process. Click the retrieve call button to place the selected call on hold while you resume the other call of the consult transfer.

Hold call

Click the hold button to place the selected call on hold.

Resume call

Click the resume button to resume/connect the selected call work item. If another call is connected, the call is first placed on hold.

Change log

Date	Changes
01-June-2012	Reformatted and updated content.
27-March-2013	Reformatted, updated content, and edited.
07-August-2014	Updated documentation to reflect 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.
16-January-2015	Updated copyright page to 2015. Updated 2015 R1 references to R2. Updated template and formatting.
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 Interaction Desktop.
26-June-2015	Updated logo. Updated 2015 R3 references to R4.
16-September-2015	Updated 2015 R4 references to 2016 R1. Removed references to retired Interaction Client .NET Edition.
10-November-2015	Added note about multi-session support for the communications toolbar.
24-November-2015	Updated 2016 R1 references to 2016 R2.
19-July-2017	Rebranded document to apply Genesys terminology. Retitled this document "CIC Integration to Siebel User's Guide".
07-August-2017	Updated cover, copyright and trademark pages.