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See Change Log for summary of changes.

GENESYS™

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/pureconnect.

Table of Contents

Introduction to the CIC Integration to Siebel

The CIC Integration to Siebel, which is a telephone communication manager, offers the same functionality as your office telephone. The integration doesn't require you to use the telephone, thereby, allowing you to focus on the computer monitor.

The integration supports Siebel 7.X, Siebel 8.X and higher.

Administrative Functions

Following are the administrative functions that users can access from the Communications Toolbar.

Logon

If you are logged on to the CIC client, or if your administrator configured telesets 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. For the integration, "CIC client" refers to Interaction Desktop.

The Siebel Communications Toolbar supports one browser session by default but you can configure it to allow more concurrent sessions. If you exceed the maximum number of sessions that Siebel allows, you cannot log on to another toolbar session.

Workstation logon

Use this option to log on remotely.

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 the value in the text box only when the cursor is in the text box 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, 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** icon to change your status. Your status determines whether the system routes calls to you. All statuses categories are either **Available** or **Do Not Disturb**. You can use a non-specific status or a specific status. Specific statuses indicate why you are or aren't available; 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.

For more information, see the following:
- Stop receiving calls (non-specific status)
- Resume taking calls (non-specific status)
- Change to specific status

Change status

Stop receiving calls (non-specific status)

To stop receiving calls with a non-specific status, click the Status icon during or after a call. Your agent status changes to a Do Not Disturb type state. The Status icon changes to a selected state.
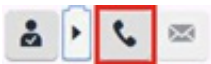
Resume taking calls (non-specific status)

To resume calls with a non-specific status, Click the Status icon. Your agent status changes to an Available type state and the Status icon changes to an Enabled type state.

Change to specific status

To change to a more specific status, click the Phone icon.

Stop taking calls (specific status)

You can select a specific status to stop taking calls.

To stop taking calls with a specific status

1. Next to the Status icon, click the small arrow.

2. Click the Phone icon. The **Select the status** dialog box appears.
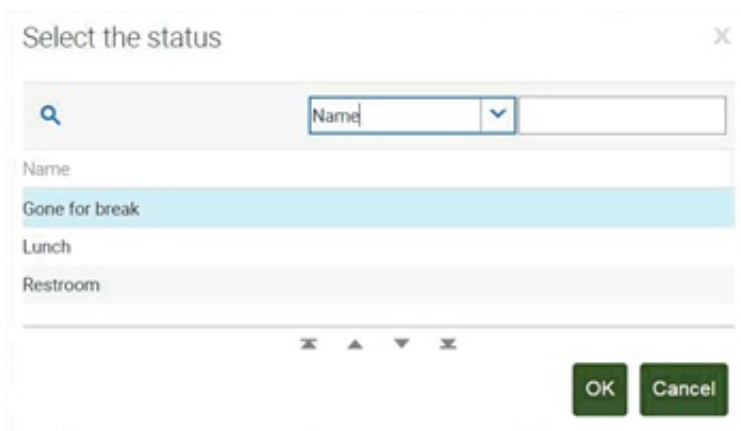
3. Click a specific status and then click **OK**. For example, at lunchtime, click the **Lunch** status. The Status icon changes to a Selected type state because this status is a Do Not Disturb type status.

Resume taking calls (specific status)

To resume calls with a specific status
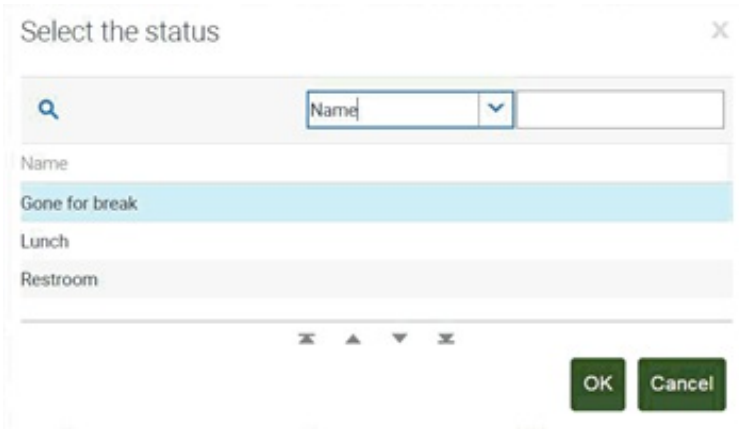
1. Next to the Status icon, click the small arrow.

2. Click the Phone icon. The **Select the status** dialog box appears.

3. Click a specific status and then click **OK.** For example, if it is time to return to work, click **Available**. The Status icon 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 routing to you

1. Click the Status icon. 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 complete the call, click the right arrow next to the Status icon.
4. Click the Phone icon. The **Select the status** dialog box appears.
5. Select the **Gone Home** check box and then click **OK**.
6. Click **Logout** and exit Siebel.

Communications Toolbar

The Siebel Communications Toolbar provides access to all the Siebel and CIC Integration features.

Each option in the toolbar can have the following states:

- **Enabled** – The option is available. The icon appears in color and has a box around it when you rest your mouse on it.
- **Unavailable -** The option is not available. The icon is a faint gray and doesn't change when you rest your mouse on it.
- **Blinking -** The icon's background alternates between pressed and released. The Answer Call icon is the only icon that blinks to indicate that you have an incoming call to answer.
- **Selected -** The icon's background appears pressed.

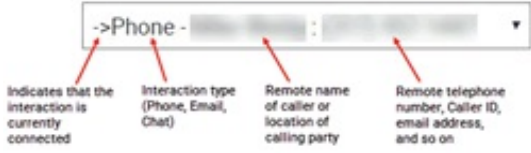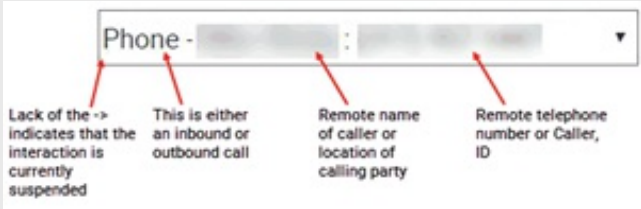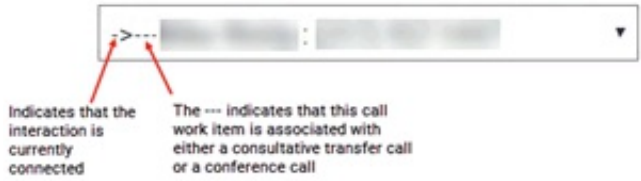For more information about the options in the toolbar, see Managing communication.

Managing Communication

Use the Siebel Communications Toolbar to manage all calls in your queue.

Work items

The **Work Item List** box 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 table lists the possible states.

Connected call	Following is how the **Phone** box displays information for a connected call.
Suspended call	Following is how the **Phone** box displays information for a suspended call. To resume a suspended call, click the Resume Call icon.
Outbound call	Following is how the **Phone** box displays information for a call associated with an outbound call. **Note:** When you click the Consult Transfer Init or Conference Init icon, the system places the current call on hold and then places an outbound call.

Following are the toolbar options.

Call Duration

The **Call Duration** box shows the elapsed time of the selected call. The clock starts when an inbound or outbound call first connects.

When you select a call that is on hold, the **Call Duration** box appears unavailable until you click **Resume Call** to resume the call. When you resume a held call, the **Call Duration** box 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 icon shows the time an incoming call was in the phone system before it connected to your phone. To see the time your current call was in the queue, rest your mouse over the Clock icon.

00:00:44

one - M In queue 00:00:16
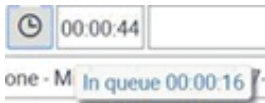
> **Note:** Your system administrator configures how the system determines the total time in queue. For more information, contact your system administrator.

Make Call

The Make Call icon allows you to make an outbound call to a remote party. The phone number sent to the phone system is based on many criteria.

For example, following are possible ways of handling a call:

- Type a phone number in the **Phone Number** box to route the call that number.
- Leave the **Phone Number** box empty and select a Siebel Contact to route the call to the contact's work phone number.
- Leave the **Phone Number** box empty and select an employee from the **Employee List** window to route the call to the employee's number.

For information about the exact functionality available at your location, contact your System Administrator.

Answer Call

The Answer Call icon blinks to notify you when a new call is available for you. To accept the call, click the Answer Call icon or pick up the telephone handset. The Answer Call icon unavailable after the call connects.

> **Note:** You can click the Answer Call icon to answer non-ACD calls only. If the Auto Answer option is set, then you cannot use the Answer Call icon.

Release Call

Use the Disconnect Call icon to disconnect the call that is selected in the **Work Item** list box. If two or more calls are in the **Work Item** list box and you disconnect one of the calls, the system selects the other call. Each icon'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 the Resume Call icon.

Blind Transfer

Use the Blind Transfer icon to blind transfer the selected call to a remote party. For examples of how the system handles the call, see Call Handling Example.

Consult Transfer Init and Consult Transfer Complete

Depending on the state of the selected call, you can use the Consult Transfer icon to perform two separate operations.

Consult Transfer Init

Use the Consult Transfer icon to place the current connected call on hold while you place an outbound call. For examples of how the system handles the call, see Call Handling Example.

> **Note:** You can click the Consult Transfer icon for an inbound or outbound call.

After the outbound call connects, a new call appears in the **Work Item** list box 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 icon changes to the Consult Transfer Complete icon.

Consult Transfer Complete

Use the Consult Transfer icon to transfer the original party to the outbound call. After the consultative transfer is complete, the system removes both calls from the **Work Item** list box.

Conference Init and Conference Complete

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

> **Note:** You can click the Conference icon for an inbound or outbound call.

Conference Init

Use the Conference icon to place the current call on hold while you place an outbound call. For examples of how the system handles the call, see Call Handling Example.

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

Conference Complete

Use the Conference icon to bring the original party and other party into a conference call. If the original party is actually a conference call in progress, the system adds the other party as a new party to the existing conference call. After completing the conference, the system removes both calls from the **Work Item** list box and displays a new conference work item.

Multi-way Conferencing

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

Retrieve Call

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

Hold Call

Use the Hold Call icon to place the selected call on hold.

Resume Call

Use the Resume Call icon to resume or connect the selected call work item. If another call is connected, the system places the call on hold first.

Call Handling Example

The phone number sent to the phone system is based on many criteria. For example, following are possible ways of handling a call:

- Type a phone number in the **Phone Number** box to route the call to that number.
- Leave the **Phone Number** box empty and select a Siebel Contact to route the call to the contact's work phone number.
- Leave the **Phone Number** box empty and select an employee from the **Employee List** window to route the call to the employee's number.

For information about the exact functionality available at your location, contact your System Administrator.

Change log

The following table lists the changes to the *CIC Integration to Siebel User's Guide* since its initial release.

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.
20-December-2018	Updated for Siebel 2018.
18-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...".

Copyright and trademark