



Avaya CT for Siebel 7
Release 4.0
User Guide

September 2006

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Preface

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Purpose

This guide contains procedures on how to use the Avaya Computer Telephony (CT) for Siebel 7 solution. It is assumed that the procedures provided in the *Avaya CT for Siebel Installation Guide* and the *Avaya CT for Siebel Administration Guide* have been completed.

Audience

This guide is intended primarily for those who use Avaya CT for Siebel 7. You should use this guide as an information source for changing the configuration of your Avaya CT for Siebel 7 system.

Reason for reissue

This document was reissued to include support for Siebel 7 with Avaya CT Server as well as Application Enablement Services (AE Services).

Related documentation

This section provides a list of documents related to Avaya CT, Avaya CT for Siebel, and Siebel Enterprise Applications.

Avaya CT documentation

The following document is related to Avaya CT. This document is stored on the Avaya CT CD-ROM (not provided with Avaya CT for Siebel).

Avaya CT document	File name (PDF)
Telephony Services Administration and Maintenance	netmangd.pdf

Avaya CT for Siebel documentation

The following documents are related to Avaya CT for Siebel. These documents are stored on the Avaya CT for Siebel 7 CD-ROM under the \Docs folder in the root directory.

Avaya CT for Siebel documents	File name (PDF)
User Guide	user.pdf
Installation Guide	install.pdf
Administration Guide	admin.pdf
Release Notes	ReleaseNotes.pdf

Siebel Enterprise Applications documentation

The following documents are related to the Siebel Enterprise Applications. These documents are stored on the Siebel Bookshelf CD-ROM (not provided with Avaya CT for Siebel).

Siebel Bookshelf document
Communications Server Administration Guide
Siebel Tools Guide
Application Administration

The Avaya CT for Siebel solution

Welcome to a new paradigm in business management! The Avaya CT for Siebel solution empowers your existing Siebel application environments with Computer Telephony Integration (CTI) capabilities and a dynamic Call Management System (CMS) real-time scrolling marquee. The solution includes two enhancements: the Avaya CT for Siebel Soft Phone driver and CMS Messaging.

The Avaya CT for Siebel Soft Phone

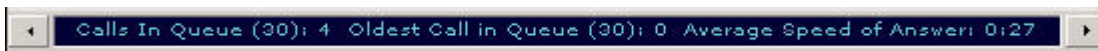
With the Avaya CT for Siebel Soft Phone driver, your existing Siebel application is enhanced with telephony functions, allowing agents to not only use Siebel as a soft phone, but also to transfer data to other agents in many forms (optional).



This data can be in the form of Siebel Bookmarks, Word Documents, or virtually any other medium. The Soft Phone works behind the scenes and requires nothing additional from the user. Plus, applets such as Change Agent State (optional) further enhances the CTI experience. Additional features of the driver include Call Service (optional), which allows the Avaya communication server to send both the collected digits for a call as well as the accumulated time that the call has waited in queue (optional) before the call is delivered to an agent. All of these powerful features blend seamlessly within the existing Siebel client.

CMS Messaging Service

The CMS Messaging Service is a powerful application that reports call center statistics in real time within your Siebel applications.



The Avaya CT for Siebel solution

As agents within a split perform their various functions, data elements defined for that user scroll in the Siebel scrolling marquee window. Several elements are available, such as Oldest Call in Queue, Calls in Queue, and Average Speed of Answer. You may create any number of profiles, defined by skill on the communication server, and reported through the client by Siebel Divisions. The CMS Messaging Marquee appears inside of Siebel, scrolling independently and updating at defined intervals. The data scrolls from left to right or right to left, giving the marquee the look and feel of a real-time data read-out.

This system is completely self-contained. All you need is a Siebel Enterprise Application, a Windows-based server, and an Avaya CMS. Administrators can add additional clients and skills to the Siebel scrolling marquee, and CMS data will begin scrolling for those added users and skills.

CMS Messaging Service is a display-only service for the agent, no changes can be made to the statistics. For more information about CMS statistics, see the *Avaya CT for Siebel Administration Guide*.

Supported client platform

The following table lists the client platform with the associated operating systems and Siebel versions that are supported for the platform.

Client platform	Operating system	Siebel version
Win32	Windows 2000 Professional	Siebel 7
	Windows XP	Siebel 7
	Windows 2003	Siebel 7

Using the Telephony Toolbar

The Avaya CT for Siebel package includes call control features and other features, such as Aux Mode With reason codes on Avaya communication servers.

The following applet has been developed by Avaya:



Change Agent State: Allows agents to use a pop-up pick list to explicitly change their state. This includes the Aux Mode with a reason code.

This section includes the following topics:

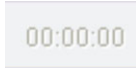




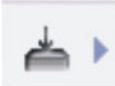


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
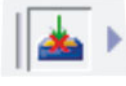

Toolbar icon layout and descriptions



The Siebel Soft Phone appears as a docked part of the toolbar of the Siebel client. Within Siebel, the functionality of the soft phone is often context sensitive (context sensitivity is set up through the CTI configuration). For instance, clicking the Initiate a Work Item icon may cause a call to be placed to a telephone number that is in a phone number field on the screen, depending on the current view. The following table describes the soft phone functions.

Icon	Name	Description
	Media Indicator	Indicates which type of media is appearing on the soft phone.
	Queue Time Display (optional)	Indicates how long a call has been in queue before being answered.

Using the Telephony Toolbar

Icon	Name	Description
	Call Timer	Indicates how long the agent has been on a call once the call has been answered.
	Call Destination	Provides a data entry field that tells the CTI application to which number a call, transfer, or conference can be made. If this entry is blank when a call, transfer, or conference is made by the agent, the Call Center Pick List may be displayed (see Calling another agent on page 17), or the agent may place a call to any phone field within Siebel (for example, Contact Work or Account Main).
	Initiate a Work Item	Initiates a work item when you select a sidebar icon.
	Initiate a Work Item Sidebar	Clicking the sidebar displays the following functions: <ul style="list-style-type: none"> ● Make Call to a number in the Call Destination field or to any Siebel phone field if the CTI configuration has been set up to click and dial (for example, Contact Work or Account Main) ● Send Email ● Send Fax ● Send Wireless Message ● Send Page
	Accept Incoming Work Item	Flashes when a call is ringing at this extension and accepts a work item when you select a sidebar icon.
	Accept Incoming Work Item Sidebar	Clicking the sidebar displays the following functions: <ul style="list-style-type: none"> ● Accept Call ● Accept Mail ● Accept Web Call
	Release Work Item	Drops the current call or drops a transfer or conference call.
	Blind Transfer Work Item	Transfers a call to another number without consultation.

Icon	Name	Description
	Consultative Transfer Work Item	Starts or completes a transfer to another number after consultation.
	Conference Work Item	Starts or completes a conference call. Click once to start a conference call; click a second time to complete the conference call.
	Retrieve Work Item	Cancels a transfer or conference.
	Pause Work Item	Holds the active call.
	Call Display	Displays the status of each call on the soft phone. By clicking the down arrow to the right of the field, agents can view the status of all calls at their extension.
	Resume Work Item	Reconnects to a call on hold.
	Forward Work Item	Depending on the configuration, deflects a ringing call or turns on the Send All Calls feature.
	Toggle Agent State	Toggles the agent's state of availability (only available while logged in to an ACD).
	Toggle Agent State Sidebar	Clicking the sidebar displays the following states: <ul style="list-style-type: none"> ● Not Ready for Calls ● Not Ready for Email ● Not Ready for Web Calls
	Log In	Logs the user in to the ACD.

Icon	Name	Description
	Log Out	Logs the user out of the ACD.
	Set Agent State	Displays the set agent state pick list (only available while logged in to an ACD). See Changing Set Agent State on page 16.

Transferring calls

To perform a transfer, you must first determine whether you want a blind transfer or consultative transfer.

Blind transfer

A blind transfer immediately transfers the call to another agent so that it appears as a normal incoming call. The target agent receives any screen transfers that are applicable.

To perform a blind transfer while on a call:

1. Enter the target agent's extension or number in the **Call Destination** field.
2. Click the Blind Transfer Work Item icon.

Result: The call is transferred to the new agent.

Related topics

- For more information about screen transfers, see [Transferring screens and bookmarks](#) on page 15.
- For more information about locating icons, see [Toolbar icon layout and descriptions](#) on page 11.

Consultative transfer

A consultative transfer places the caller on hold and dials the target agent. You will have an opportunity to announce the call to the agent before transferring the caller to the agent.

To perform a consultative transfer while on a call:

1. Enter the target agent's extension or number in the **Call Destination** field.
2. Click the Consultative Transfer Work Item icon.

Result: This automatically places the caller on hold and dials the target agent on the next available line. When the agent answers, announce the call and give any pertinent details.

3. Do one of the following options:
 - If the agent can take the call, click the Consultative Transfer Work Item icon again. This transfers the call to the agent, including any screen transfers that are applicable.
 - If the agent cannot take the call, click the Retrieve Work Item icon. This drops the target agent, takes the caller off hold, and reconnects you to the caller.

Related topics

- For more information about screen transfers, see [Transferring screens and bookmarks](#) on page 15.
- For more information about locating icons, see [Toolbar icon layout and descriptions](#) on page 11.

Transferring screens and bookmarks

Screen transfers and bookmark transfers do not require user action. If the agent transfers or conferences to another ACD agent, VDNs, or stations, the software automatically transfers the screen and bookmark data and displays it on the target agent's screen.

Note:

Transferring screens and bookmarks is set up by your system administrator. The Siebel CTI CmdData AttachContext option must be set to TRUE and the EventResponses UseCtxData must be set to TRUE. These options are described in the Siebel documentation.

Conferencing calls

Conference calls work similar to Consultative Transfers except that you remain on the call when the call is conferenced with the target agent.

To begin the conference:

1. Enter the target agent's extension or number in the **Call Destination** field.

Using the Telephony Toolbar

2. Click the **Conference Work Item** icon.

Result: The caller is placed on hold and a call is placed to the agent.

3. When the agent answers, announce the conference call, and click the **Conference Work Item** icon again.

Result: You, the caller, and the other agent are conferenced on the same call.

4. If the conference must be stopped, click the **Retrieve Work Item** icon.

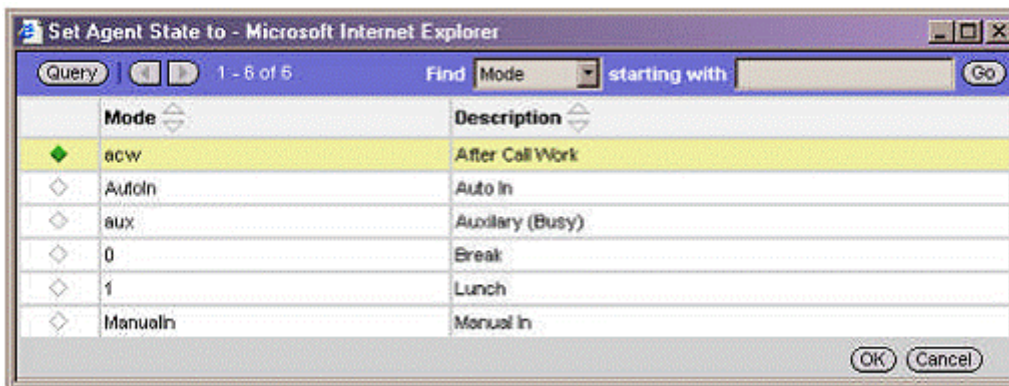
Related topic

For more information about locating icons, see [Toolbar icon layout and descriptions](#) on page 11.

Changing Set Agent State

To change the agent state:

1. Click the **Set Agent State** icon.



2. From the **Set Agent State** window, change the availability state by selecting a mode from the list.
3. Click **OK**.
4. To stop the operation, click **Cancel**.

Result: The availability state is changed and is displayed in the status bar of the Siebel application.

Calling another agent

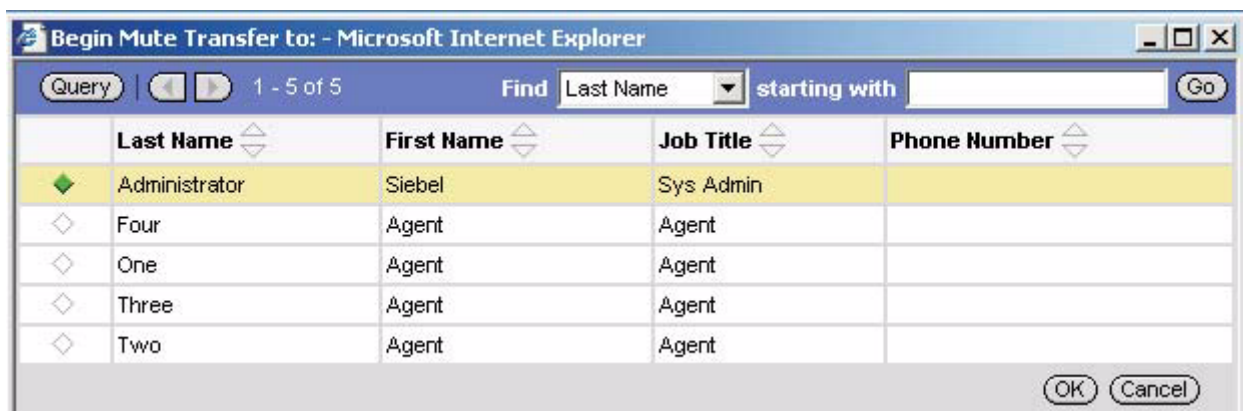
It is possible to transfer, conference, or call another agent in the call center without entering the extension number using the **Call Destination** field. This method of dialing another agent functions exactly the same as if the number was entered manually. It is simply a convenient shortcut for call center agents.

Note:

The **Call Center Pick List** and outbound dialing filter rules for the pick list are configured by your Siebel administrator.

To use the **Call Center Pick List**:

1. Click the **Make Call**, **Blind Transfer**, **Consultative Transfer**, or **Conference** buttons without entering a number in the **Call Destination** field.



2. From the **Call Center Pick List**, choose a target agent by clicking an entry.
3. Click **OK**.
4. To stop the operation, click **Cancel**.

Result: The call is placed to the selected agent.

Glossary

Application Enablement Services (AE Services)	Avaya Application Enablement Services (AE Services) provides an enhanced set of APIs, protocols, and Web services. It merges DLG, CVLAN, Avaya CT, and CMAPI into a single platform that provides a communication channel to all Avaya Communication Manager Media Servers.
Automatic Call Distribution (ACD)	Automatic Call Distribution (ACD) is a feature that answers calls, and then depending on administered instructions, delivers messages appropriate for the caller and routes the call to an agent when one becomes available.
Computer Telephony Integration (CTI)	Computer Telephony Integration (CTI) technology allows interactions on a telephone and a computer to be integrated or coordinated.
Siebel work item	A unit of work that belongs to an agent. For the Soft Phone Toolbar, all work items are associated with telephone calls answered by agents.

Siebel work item

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