



# **Siebel CRM Call Center On Demand Integration Pack Installation Guide**

for Oracle E-Business Suite Telesales and  
Teleservice, and for Peoplesoft Enterprise  
HelpDesk, HR HelpDesk, and Support

October 2006

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# 1

# Introduction to Siebel CRM Call Center On Demand Integration Pack

## Preface

Welcome to the Siebel CRM Call Center On Demand Integration Pack Installation Guide.

## TTY Access to Oracle Support Services

Oracle provides dedicated Text Telephone (TTY) access to Oracle Support Services within the United States of America 24 hours a day, seven days a week. For TTY support, call 800.446.2398.

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Screen readers may not always correctly read the code examples in this document. The conventions for writing code require that closing braces should appear on an otherwise empty line; however, some screen readers may not always read a line of text that consists solely of a bracket or brace.

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## Structure

- 1 [Introduction to Siebel CRM Call Center On Demand Integration Pack](#)
- 2 [Siebel CRM Call Center On Demand Integration Pack Environment](#)
- 3 [Integrations](#)
- 4 [Installation and Configuration](#)
- 5 [Troubleshooting](#)

## Related Documents

For more information, read the following documents:

- Oracle Common Application Components User's Guide
- Oracle TeleService Implementation Guide
- Oracle TeleService User Guide
- Oracle Universal Work Queue User Guide
- PeopleSoft Enterprise CRM 8.9 Call Center Applications PeopleBook
- Siebel CRM Call Center On Demand Administrator Online Help
- Siebel CRM Call Center On Demand Online Help

## Do Not Use Database Tools to Modify Oracle Applications Data

Oracle STRONGLY RECOMMENDS that you never use SQL\*Plus, Oracle Data Browser, database triggers, or any other tool to modify Oracle Applications data unless otherwise instructed.

Oracle provides powerful tools you can use to create, store, change, retrieve, and maintain information in an Oracle database. But if you use Oracle tools such as SQL\*Plus to modify Oracle Applications data, you risk destroying the integrity of your data and you lose the ability to audit changes to your data.

Because Oracle Applications tables are interrelated, any change you make using an Oracle Applications form can update many tables at once. But when you modify Oracle Applications data using anything other than Oracle Applications, you may change a row in one table without making corresponding changes in related tables. If your tables get out of synchronization with each other, you risk retrieving erroneous information and you risk unpredictable results throughout Oracle Applications.

When you use Oracle Applications to modify your data, Oracle Applications automatically checks that your changes are valid. Oracle Applications also keeps track of who changes information. If you enter information into database tables using database tools, you may store invalid information. You also lose the ability to track who has changed your information because SQL\*Plus and other database tools do not keep a record of changes.

## Glossary and Abbreviations

**ANI.** Automatic Number Identifier

**BPEL.** Business Processes Execution Language, a standards-based extensible language.

**CCOD.** Siebel CRM Call Center On Demand

**DNIS.** Dialed Number Identification Service

**FMW.** Fusion Middle Ware

**Oracle.** Refers to Oracle TeleSales and Oracle TeleService

**otherDN.** Used by PeopleSoft as the equivalent of ANI

**PeopleSoft.** Refers to PeopleSoft Enterprise HelpDesk, PeopleSoft Enterprise HelpDesk for Human Resources, and PeopleSoft Enterprise Support products

**screen pop.** Any technology that presents data on the computer screen that corresponds to the incoming call.

**UWQ.** Universal Work Queue





# 2

## Siebel CRM Call Center On Demand Integration Pack Environment

This chapter contains the following information:

- "About Siebel CRM Call Center On Demand Integration Pack" on page 9
- "Software Requirements" on page 10
- "Managing Security for PeopleSoft" on page 10

## About Siebel CRM Call Center On Demand Integration Pack

Siebel CRM Call Center On Demand Integration Pack integrates the Siebel CRM Call Center On Demand product with the following products:

- Oracle TeleSales and TeleService
- PeopleSoft Enterprise HelpDesk, HR HelpDesk, and Support

Figure 1 shows the result of this integration.

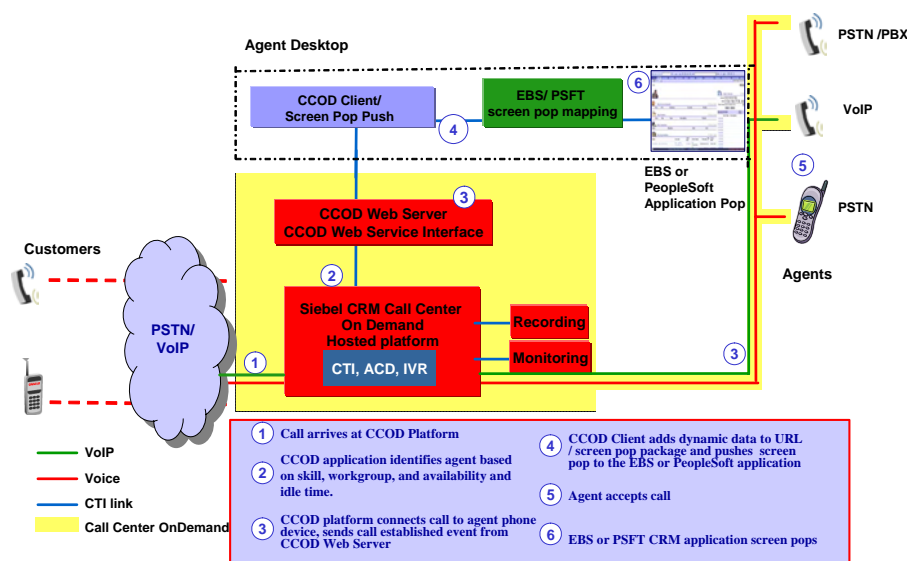


Figure 1. Siebel CRM Call Center On Demand Integration

Your implementation uses either Oracle or PeopleSoft call center products but not both. Some information in this guide is common to all products and some is specific to either Oracle or PeopleSoft. In cases where the information is specific to just one product, the product's abbreviation, either Oracle or PeopleSoft, is included in the topic heading.

## Oracle and CCOD Communication

Communication between CCOD and Oracle clients is achieved using a local http server. Each client has their own server. The CCOD client sends basic screen pop information, including customer IVR input, in an XML-formatted message to the Oracle client's local http server. The CCOD-to-Oracle communications include delivering agent interaction information, such as inbound calls and agent transfers.

Communication from the Oracle client to the CCOD client is by a post command to the CCOD local http server. The Oracle-to-CCOD communications include registering the Oracle http server with CCOD, managing the CCOD agent availability state, and making agent outbound calls.

## PeopleSoft and CCOD Communication

When a call comes in Siebel CCOD collects the data from the customer's touch-tone phone and formulates a URL based on the values collected. Siebel CCOD then initiates a screen pop to the URL. This URL is set up on the Siebel CCOD side and there are parameters appended to it, which contain data specifically for the applications. PeopleSoft parses the URL and opens the appropriate component.

# Software Requirements

Siebel CRM Call Center On Demand Integration Pack requires a subscription to Siebel CRM Call Center On Demand and the following software versions:

For Oracle:

- Oracle eBusiness Suite V11.5.10 CU2 (Consolidated Update 2), TeleSales or TeleService

For PeopleSoft:

- PeopleSoft Enterprise HelpDesk, HR HelpDesk, and Support V8.9

Siebel CRM Call Center On Demand service is available only in the English language localization. The Siebel CRM Call Center On Demand Integration Pack supports integration with either Oracle eBusiness Suite or PeopleSoft Enterprise applications in the English language localization.

## Managing Security for PeopleSoft

Security is based on existing security for Call Center agents. If the agent is CTI-enabled, and has a valid CCOD login Id, the agent is authorized to receive screen pops. The agents need access to the WEBLIB\_RB web library. This should be added to a permission list associated to the agent, or an existing permission list with this weblib should be added to the agent's Role. You need to grant Full Access to the GETINFO.FieldFormula.IScript\_CTIdirect\_COD function within that weblib.

# 3 Integrations

This chapter covers the following information:

- [Oracle and Siebel CCOD Mappings on page 11](#)
- [PeopleSoft and Siebel CCOD Mappings on page 14](#)

## Oracle and Siebel CCOD Mappings

The following mappings affect Oracle and Siebel CCOD:

- [Siebel Interaction Types and Oracle Media Type Mappings on page 11](#)
- [Oracle and Siebel Screen Pop Event Key Mappings on page 12](#)

## Siebel Interaction Types and Oracle Media Type Mappings

Siebel CCOD sends screen pop events for media types not supported currently in Oracle. Outbound calling, email, and web callback transfers are not supported.

[Table 1](#) lists the mappings from Siebel Interaction Types to Oracle Media Types.

Table 1. Siebel Interaction Types Mappings to Oracle Media Types

Description	Oracle Media Type	Screen Pop ?
NEW_INBOUND_CALL	INBOUND_TELE	Yes
NEW_OUTBOUND_CALL	ADVANCED_OUTBOUND_TELE	No
NEW_PREDICTIVE_CALL	ADVANCED_OUTBOUND_TELE	No
NEW_INBOUND_EXTENSION	INBOUND_TELE	No
NEW_OUTBOUND_EXTENSION	ADVANCED_OUTBOUND_TELE	No
NEW_ACD_CALL	INBOUND_TELE	Yes
NEW_ACD_WEB_CALLBACK	WEB_CALLBACK	Yes
NEW_ACD_CALLBACK	WEB_CALLBACK	Yes
NEW_ACD_EMAIL	INBOUND_EMAIL	No
NEW_ACD_VOICEMAIL	INBOUND_TELE	Yes

## Oracle and Siebel Screen Pop Event Key Mappings

Table 2 lists the mappings between Oracle and Siebel screen pop keys.

Table 2. Oracle and Siebel Screen Pop Event Keys

Siebel Event Key	Description	Oracle Event Key	Propagate?
agentCompanyName	The company name defined in the administration console.	NA	No
agentFirstName	The receiving agent's first name.	NA	No
agentId	The unique system identifier associated with the receiving agent.	NA	No
agentLastName	The receiving agent's last name.	NA	No
companyId	The customer's company.	NA	No
contactId	The Contact's ID. Always passed, but not populated unless a contact has been assigned. (Deprecated)	NA	No
countryCode	If the current Interaction is Predictive or Preview, this parameter has the value from the country code column in the dialer list. (Deprecated)	NA	No
faqId	The ID of the FAQ used by the Project. (Deprecated)	NA	No
from	The customer's ANI.	occtANI	Yes
interactionId	Application defined unique identifier for each interaction.	occtInteractionId	Yes, new Key
interactionType	The Interaction Type ID. See Table 1 for a list of Interaction Types. The last 1 or 2 digits are passed.	occtMediaType	Yes
isRecording	Whether the call is being recorded from the IVR (binary)	NA	No
isTransfer	Defines whether this call was transferred.	occtTransferred	Yes
ivrInfo	IVR information comes from CCOD to Oracle as key value pairs in an XML-formatted message.	Yes	Yes
outcomeId	The outcome of a call as defined in the resolution code. This is only populated if the screen pop is enabled at the end of the call.	NA	No

Table 2. Oracle and Siebel Screen Pop Event Keys

Siebel Event Key	Description	Oracle Event Key	Propagate?
phoneNumber	Phone number that customer entered in Web callback page or chat request page.	NA	No
priority	The priority of the current Interaction, taken from the Project or by a change in the IVR.	NA	No
projectId	The identifier of the project to which the inbound number is assigned.	NA	No
queueTime	Length of time that the customer has been in the queue.	NA	No
scriptId	The ID of the script used by the Project. (Deprecated)	NA	No
startTime	The start date and time of the call. This parameter is in the Unix time format based on seconds since standard epoch of 1/1/1970.	NA	No
state	The State ID of the Interaction. See the following table for a list of States. The last 1 or 2 digits are passed.	NA	No
to	The inbound number that the customer dialed.	occtDNIS	Yes
workgroupId	The unique identifier defining the workgroup to which the call was associated.	NA	No

## PeopleSoft and Siebel CCOD Mappings

Table 3 lists the supported transaction types for this integration. Each of these types correspond to a component.

Table 3. Supported Transaction Types for PeopleSoft

Component	Transaction Id
Customer 360 Search Page	9
HR Helpdesk Search Page	22
HR Worker 360 Search Page	20
IT Helpdesk Search Page	3
IT Worker 360 Search Page	17
Support Case Search Page	2

# 4

## Installation and Configuration

This chapter contains the following information:

- [“Installing Siebel CRM Call Center On Demand Integration Pack” on page 15](#)
- [“Configuring Oracle” on page 15](#)
- [“Configuring PeopleSoft” on page 19](#)

### Installing Siebel CRM Call Center On Demand Integration Pack

The Siebel CRM Call Center On Demand Integration Pack consists of patches to be applied to your existing Oracle or PeopleSoft applications. Download these patches from the customer support web site that corresponds to the products you are using.

#### Downloading and Installing Patches for Oracle

From Metalink, download and install patches 5500686 and 5209194. Apply patch 5500686 first, then apply patch 5209194.

#### Downloading and Installing Patches for PeopleSoft

From PeopleSoft Customer Connection, download patch 677001. Follow the Implementation instructions included with this patch.

### Configuring Oracle

Only one instance of Siebel CCOD and only one instance of Oracle is supported on a single machine. If another instance of Siebel CCOD or Oracle is launched and the user navigates to pages in which applets start the listeners, an error message appears that says:

```
java.net.BindException: Address already in use: JVM_Bind
```

## Configuring Profile Options in Oracle

Table 4 shows the profile options that must be configured to work with Siebel CCOD.

Table 4. Oracle Configuration Changes

Profile Name	Value	Meaning/Use
IEU: Message: UI: UWQ Notices	No	
IEU: Controller: UI: Enable Event Viewer	No	
IEU: Queue: Basic Web Callback	No	
IEU: Queue: Web Callback	No	
IEU: Queue: Advanced Outbound Telephony	No	
IEU: Queue: Inbound Telephony	No	
IEU: Controller: UI: Hide	Yes	
IEU: Queue: Basic Telephony	No	
CCT: Basic Telephony: Listener Port		Port number on which the Oracle HTTP Listener is started
CCT: Basic Telephony: Log Level	Error	Log level for the UWQ Client Plug-in module
CCT: Basic Telephony: Reconnect Interval	10000	Reconnect Interval in seconds
CCT: Basic Telephony: Third Party URL	http://localhost:8445	Siebel URL to submit Callouts. This must be in this form: http://localhost:8445
CCT: Basic Telephony: OnDemand Integration	Yes	Must be set to "Yes" when Siebel CCOD Integration is turned on. Used to drive Siebel specific code path.



Table 4. Oracle Configuration Changes

Profile Name	Value	Meaning/Use
Customer Care: Telephony Integration Mode	Contact On Demand	Set this to Contact On Demand. Possible Values: <ul style="list-style-type: none"> <li>■ UWQ. Specifies that Contact Center Telephony Integration is by UWQ.</li> <li>■ Contact On Demand. Used for Direct Contact Center integration with CCOD.</li> </ul>
IEU: Desktop: Telephony: Direct Call Handling	Pop On Call Arrival	Required to get Screen Pops through UWQ

**NOTE:** The terms “Contact On Demand” and “Contact OnDemand” are legacy terms that appear in the user interface and refer to Siebel CRM Call Center On Demand.

## Customer Lookup Procedure

The customer lookup procedure depends on the form being used. If a Service request form (a part of Teleservice) is used, the customer lookup uses a Service Request Number. However, if a Contact Center form (a part of Teleservice) is used, the customer lookup uses the following fields:

- Account Code
- ANI
- Contact Number
- Contract Number
- Customer Number
- Instance Name
- Invoice Number
- Order Number
- RMA Number
- Serial Number
- Service Request Number
- Social Security Number
- System Name
- Tag Number

If Telesales form is used, the customer lookup is uses the following fields:

- Account Code

- Contact Phone Number
- Collateral request number
- Customer Phone Number
- Event Code

## Configuring IVR Parameters

To configure the IVR parameters, use the following procedure.

### *To configure IVR parameters*

- 1 Log on to Call Center HTML Admin.
- 2 Navigate to Server group BASIC\_SDK.
- 3 Create the following IVR mappings.

**NOTE:** The IVR Field column here contains typical values. Your installation may use other values.

Table 5. IVR Fields and Oracle Equivalents

IVR Field	Oracle Field
AccountCode	Account Code
ContactNum	Contact Number
ContractNum	Contract Number
CustomerNum	Customer Number
InstanceName	Instance Name
InvoiceNum	Invoice Number
IVR Field	Oracle Field
OrderNum	Order Number
RMANum	RMA Number
SerialNum	Serial Number
ServiceRequestNum	Service Request Number
SocialSecurityNumber	Social Security Number
SystemName	System Name
TagNumber	Tag Number

# Configuring PeopleSoft

To configure PeopleSoft, use the following procedure.

## *To Configure PeopleSoft to Communicate with Siebel CCOD*

- 1 In PeopleSoft, navigate to the setup page for Siebel CCOD integration:  
Setup CRM > Common Definitions > Integration Rules > CTI > Contact OnDemand Configuration  
You need to make changes in both the Configuration and Exception Mapping tabs.
- 2 In the Configuration tab, make sure the Contact OnDemand Licensed check box is checked.
- 3 In the parameter matching table, set the Contact OnDemand Parameter to ANI and the PeopleSoft Parameter to otherDN, and then click Add Mapping.

Figure 2 shows an example entry.

**Configuration**   **Exception Mapping**

☒ **Contact OnDemand Licensed**

These values should only change when URL parameters have changed in the code line.

Contact OnDemand Parameter	PeopleSoft Parameter	
ANI	otherDN	

**Add Mapping**

**Modified**   04/06/2006 4:13PM PDT

**Save**

Figure 2. Configuration Tab Example

The parameter matching table sets the variables that PeopleSoft applications need. Siebel CCOD does not send this variable in the URL, but it does send the ANI variable, which holds the same value needed for the otherDN variable.

- 4 In the Exception Mapping tab, set the DNIS Number to the phone number that customers or employees call in to, and set the Component Name to the page to be popped if an exceptions occurs.

This is used when calls “zero out” during a transaction. This could happen when:

- The URL does not have a CTI\_TRANSACTION id defined.

- The URL has an invalid CTI\_TRANSACTION id defined.

Figure 3 shows an example entry.

The screenshot shows a web-based configuration interface with two tabs: "Configuration" and "Exception Mapping". The "Exception Mapping" tab is selected. At the top, there is a label "\*Default Component Name" followed by a dropdown menu showing "Customer 360 Search Page". Below this, a text instruction reads: "DNIS Number should have no special characters or spaces. e.g., 1235554321". A table with two columns, "\*DNIS Number" and "\*Component Name", contains one entry: "5126529551" and "Customer 360 Search Page". To the right of the table is a trash icon. Below the table is a yellow "Add Mapping" button. Further down, a section titled "DNIS Number" contains a table with a single row: "Modified" and "04/21/2006 2:35PM PDT". At the bottom left is a green "Save" button.

Figure 3. Exception Mapping Tab Example

In the above example, if a caller calls the ACD and there is an exception, the Customer 360 Search Page displays to the agent. From there, an agent would ask the Customer for their information and proceed with the transaction. A company would typically have different DNIS numbers for different areas of their Call Center division, so multiple mappings are allowed.

For CTI screen pops to occur, the URL for the current CTI Configuration needs to be updated to use the correct domain and web site URL. Navigate to Setup CRM > Common Definitions > Integration Rules > CTI > CTI Configuration: Content Provider Name = CRM.

- 5 Set Target Portal URL to point to your portal URL. Figure 4 shows an example.

**CTI Configuration**

**Configuration Details**

**Content Provider Name** CRM

**CTI Description** Portal Node - CRM Get Content

**\*Target Portal URL** http://plc1soes\_n.peoplesoft.com/psc/ps\_newwin/

**\*Menu Name** CTI\_CONFIGURATION 🔍 **Menu Bar Name** SETUP 🔍

**\*Component** DERIVED\_CTI 🔍 **\*Market** Global ▼

**\*Page Name** DERIVED\_CTI 🔍

Figure 4. CTI Configuration Example

## Configuration Notes

- Transaction Ids (CTI\_TRANSACTION variable) are defined in the existing CTI System Data. If you use a value other than the defaults, you need to modify the RB\_COD\_CONFIG.COMPONENT\_NAME.FieldChange event to accommodate the new values.
- Agents can be configured for Siebel CCOD and PeopleSoft CTI integration. These configurations are mutually exclusive, and can work together.
- Only a single integration level is supported. Siebel CCOD can map to only one PeopleSoft domain. However, PeopleSoft can have many CODs associated to it. This is because CCOD only uses a single URL for screen pops.
- The CTI\_TRANSACTION and CASE\_ID parameters are defined in the Siebel CCOD menu setup. CTI\_TRANSACTION is hard coded in the menu structure, and CASE\_ID is obtained through "GetDigits" IVR.



# 5 Troubleshooting

This chapter covers the following information:

- ["Error Messages in Oracle" on page 23](#)
- ["Error Messages in PeopleSoft" on page 24](#)
- ["Troubleshooting Techniques" on page 24](#)

## Error Messages in Oracle

Table 6 shows possible error messages in Oracle.

Table 6. Error Messages in Oracle

Message Name and Number	Message Text	Appears In
Call out format error COD02	Missing "FunctionName" parameter in Call Out Command: received command text	Javascript alert
Call out format error COD03	Missing Address and/or port parameters in "Register" call out command: received command text	Javascript alert
Call out format error COD04	Missing dialString and/or country code parameters in "MakeCall" call out command: received command text	Javascript alert
Call out format error COD05	Unrecognized call out command: received command text	Javascript alert
CSC_COD_CONNECTION_LOST	Your application is no longer connected with telephony and is trying to reconnect. You will not get any more screen pops. Please ensure that the Siebel CRM Call Center On Demand application is running on your desktop.	Oracle
CSC_COD_CONNECTION_RESUME	Your application has reconnected.	Oracle
CSC_DIAL_ERROR	Failed to make an outbound call. Please check the number and try again.	Oracle
CSC_INVALID_THIRD_PARTY_URL	Third Party URL has not been set. You will be able to proceed only after this value has been set.	Oracle

Table 6. Error Messages in Oracle

Message Name and Number	Message Text	Appears In
CSC_READY_FAILED	Could not get into ready mode. Interaction is saved but you will not be able to receive additional calls. Please try again or contact your system administrator.	Oracle
Siebel HTTP Listener Exception COD01	Exception caught in Siebel Http Listener: exception text	Java console log file

## Error Messages in PeopleSoft

In PeopleSoft, errors are handled using the existing messages. However, if CTI\_TRANSACTION information from Siebel CCOD is missing or incorrect, then PeopleSoft uses the Exception Mapping setting to determine which component is to be used. To set this value, read [“To Configure PeopleSoft to Communicate with Siebel CCOD” on page 19](#).

## Troubleshooting Techniques

Follow these techniques depending on which product you are using:

- [“Troubleshooting for Oracle” on page 24](#)
- [“Troubleshooting for PeopleSoft” on page 24](#)

### Troubleshooting for Oracle

Connection initiation is done by Oracle. If Oracle is down, there is no effect on Siebel CCOD. When Oracle resumes it sends a register message to the Siebel listener and publishes its port to Siebel CCOD and connection should resume.

If Oracle is launched but Siebel CCOD is down, Oracle continues to check for Siebel CCOD. The ping interval is determined by the profile option CCT: Basic Telephony: Reconnect Interval. Make sure the ping interval is not set too low, which causes excessive ping.

### Troubleshooting for PeopleSoft

In the event of errors check the Siebel CCOD configuration first. Make sure the URL is correctly pointing to the iScript location on the current domain, as well as, having the correct parameters defined in the menu structure (CTI\_TRANSACTION and CASE\_ID).

Make sure the Contact OnDemand Parameter (set in the Configuration tab of Setup CRM > Common Definitions > Integration Rules > CTI > Contact OnDemand Configuration) is set to the correct value for ANI information. This is case specific, so check to make sure that you have an exact match (ANI, or Ani, or ani).



If an outage occurs, there is no way to recover a transaction that was in-progress.

If a session times out, the screen pop is dependant on PeopleTools session management to cache the component the user was on. If the component has not yet been loaded, the data is lost.



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