GENESYS™

Gplus Adapter for Siebel CRM Deployment Guide

Innovations in customization within Siebel IP 2017 and higher

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Contents

Starting with Siebel IP 2017, take into account significant changes to customization techniques.

Overview

If you are using Siebel IP 2017 or higher, pay special attention to the changes that occurred to the Siebel customization approaches introduced by Oracle. The changes directly or indirectly affect almost all procedures in the 8.0 Deployment Guide.

Important

Smartly apply these new rules even though these they are not mentioned in the 8.0 Deployment Guide. Refer to Oracle documentation for detailed information.

Using Workspaces

Siebel CRM versions IP 2017 and higher use Workspaces to manage application changes instead of the previously used technology of local databases. If you are using these Siebel versions, you must use Workspaces to perform almost all deployment steps (applying .sifs, LOV, and so on).

General practice requires that you make all changes in an open Workspace. After you complete all of the changes, you must deliver the Workspace into the MAIN database. It's your choice whether to perform all of the required Adapter's deployment steps using the mentioned Siebel tools, in a single Workspace or multiple Workspaces.

Tip

You can create one Workspace and use it from all tools. You can also create different Workspaces on different tools. Since you create all Workspaces in one database, all of them are visible from any of the Siebel tools.

For these deployment steps, you can use various tools, for example, Siebel Tools, or Siebel Web Tools/ Client.

Setting up a Workspace using Siebel Tools

In Siebel Tools, use the Workspace menu and Workspace Explorer to work with Workspaces.
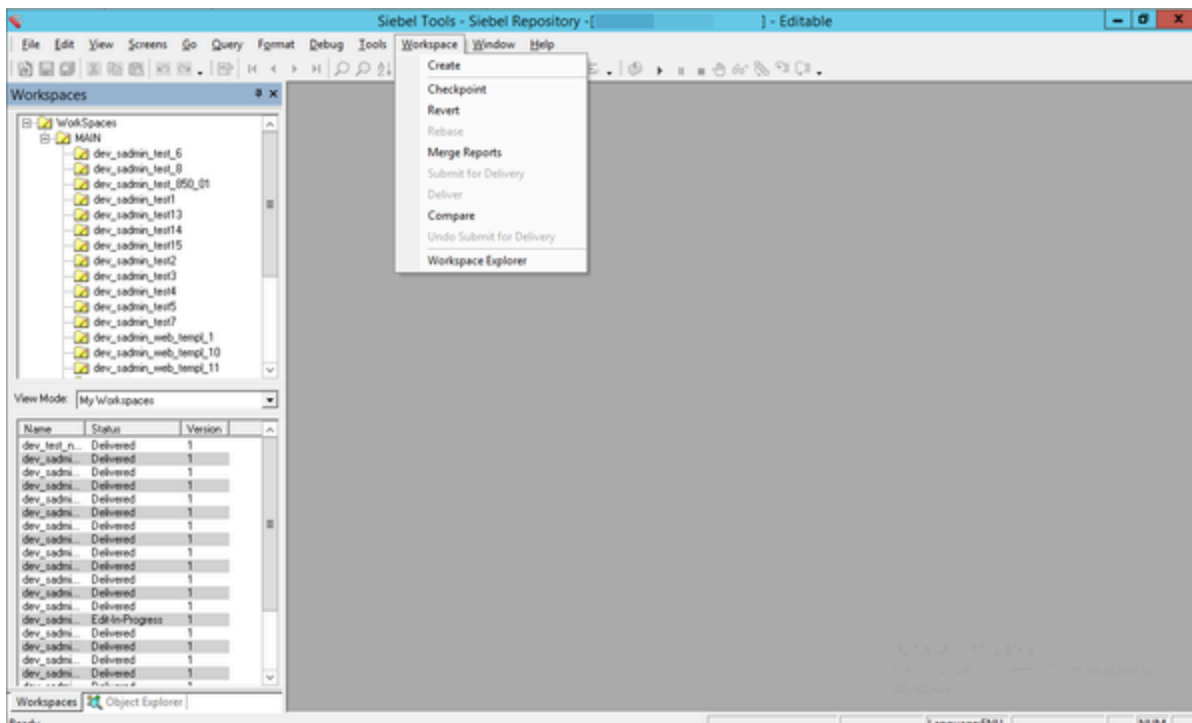
Workspace menu and explorer in Siebel Tools

To make Siebel changes to the configuration, you must first create a Workspace.

1. In Siebel Tools, from the Workspace menu, select Create.

Create Workspace dialog box in Siebel Tools
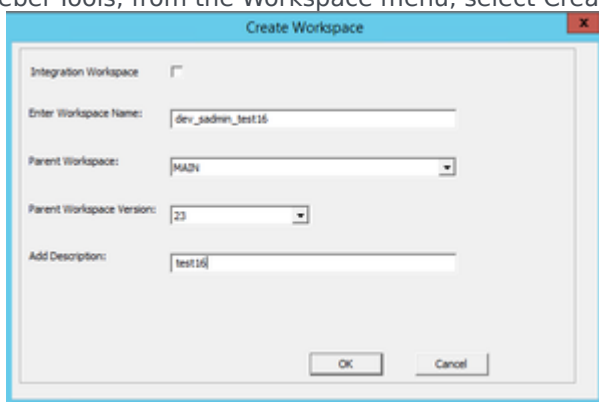
2. Complete the fields and click OK. Refer to Oracle documentation for detailed information.

> **Tip**
> After you create the Workspace, you can open it from anywhere.

3. To make configuration changes, open the Workspace using the right-click menu.

4. Make your required changes, for example, import .sif files, edit Siebel objects, import LOV, and so on.

5. From the Workspace menu, select Checkpoint to indicate your changes by tagging or adding version information into the field and click OK.

Enter Comments (checkpoint) dialog box in Siebel Tools

6. From the Workspace menu, select Submit for delivery and click Yes in the Siebel dialog box.
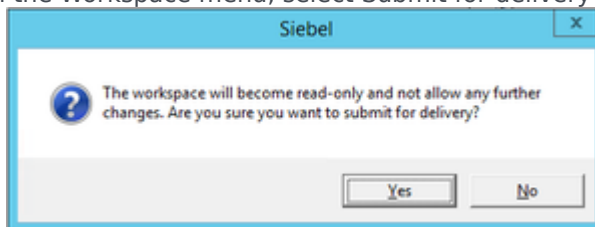
Siebel (submit for delivery) dialog box in Siebel Tools

7. From the Workspace menu, click Deliver, enter comments in the dialog box, and click OK.

Enter Comments (deliver) dialog box in Siebel Tools

For more information refer to Oracle documentation, see Workspaces Overview, Using Workspaces in Siebel Tools, and others.

Setting up a Workspace using Siebel Web Tools/Client

In Siebel Web Tools and Siebel Web Client, use the the Workspace panel to work with Workspaces.
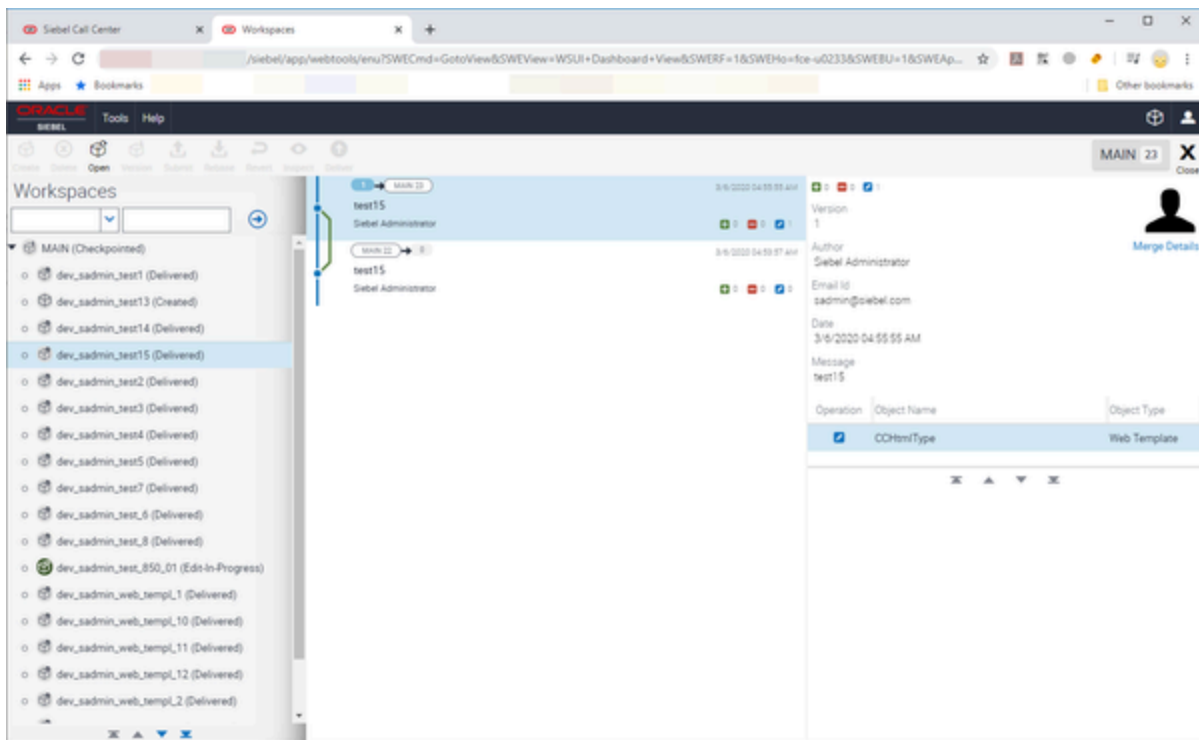
Workspace panel in Siebel Web Tools and Siebel Client

To make Siebel changes to the configuration, you must first create a Workspace.

1. In Siebel Web Tools and Siebel Client, from the Workspace menu, select the Create menu option.
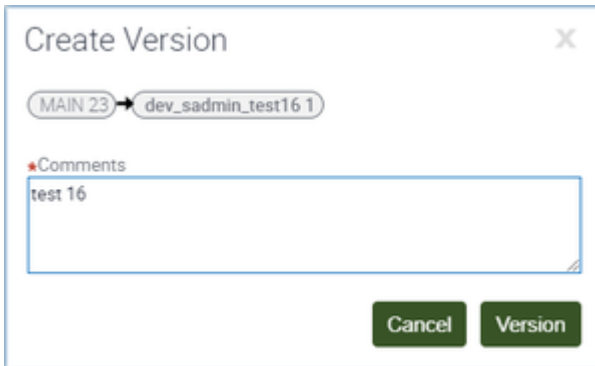

Create Workspace dialog box in Siebel Web Tools/Client

2. Complete the fields and click Create Workspace. Refer to Oracle documentation for detailed information.

> ### Tip
> After you create the Workspace, you can open it from anywhere.

3. To make configuration changes, use the toolbar button to open the Workspace.

4. Make your required changes, for example, import .sif files, edit Siebel objects, import LOV, and so on.

5. From the toolbar, select Version to indicate your changes by tagging or adding version information into the field and click Version.
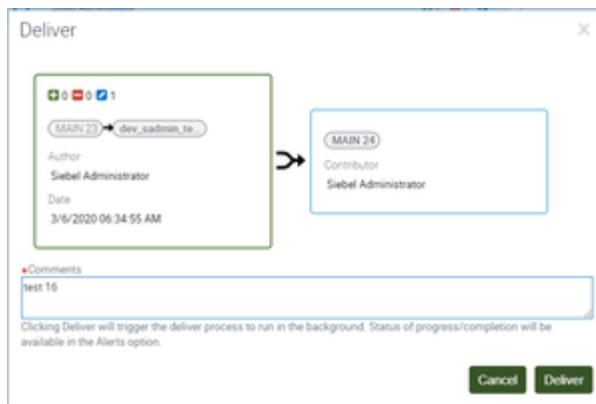

Create Version (checkpoint) dialog box in Siebel Web Tools/Client

6. From the toolbar, click Submit and then click Submit in the Deliver Workspace dialog box.

Deliver Workspace (submit) dialog box in Siebel Web Tools/Client

7. From the toolbar, click Deliver, enter comments in the dialog box, and click Deliver.

Deliver (comments) dialog box dialog box in Siebel Web Tools/Client

Non-SRF approach

Starting with Siebel IP 2017, Siebel no longer supports the Siebel Repository File (SRF). As such, when working with Siebel Tools, you no longer compile a repository. Also, you do not need to lock projects before changing them, despite it still being possible.

Siebel Tools now connect to a server database only. No local databases are supported. So, when you make changes in Siebel objects, they are applied to the MAIN branch during the Workspace delivery.

As a consequence, note the following changes, distinct from what is documented in the Gplus Adapter for Siebel CRM 8.0 Deployment Guide.

- References to steps that mention the local database or running Siebel Tools against the local database no longer apply. Starting with Siebel IP 2017, you must always connect to the server database.
- Skip any steps that mention locking or unlocking a project.
- Skip all procedures that mention compiling the Siebel Repository file.
- Deliver workspace(s) according to the strategy you chose (whether single or multiple workspaces), as described in this article.

Browser scripts generation

Prior to Siebel IP 2017, browser scripts were generated during project compilation in Siebel Tools. After the compilation, you were required to copy the generated scripts into proper place in Siebel directory tree.

Starting with Siebel IP 2017, since you no longer compile projects in Siebel Tools, you need to generate browser scripts separately using the detailed instructions in the following Oracle article: How To Generate/Deploy To AI (Web Client) Browser Scripts / Dedicated Client Browser Scripts (Doc ID 2358341.1). Note that you need an Oracle account to access the article.

> ## Important
>
> In this same Oracle article, pay particular attention to the note, that starts with "It's an expected behavior that the browser script folder name srfxxxxxxxxxx_xxx referenced in the Siebel Application changes every time..."

You usually generate browser scripts under the MAIN workspace. This means that a working workspace should be delivered to the MAIN workspace prior to scripts generation. If you need to generate browser scripts under another workspace, refer to the article, Generate All Browser Scripts Under A Specific Integration Workspace (Doc ID 2522362.1). Note that you need an Oracle account to access the article.
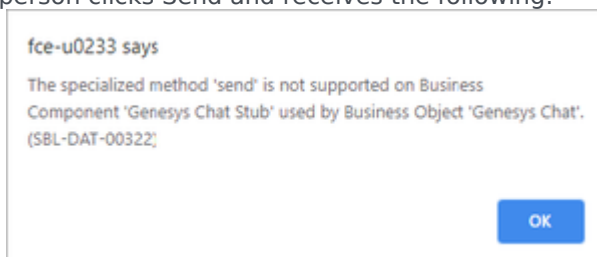
Here's one scenario that is impacted by this:

1. A person working is in the Genesys Chat user interface and sees the following:
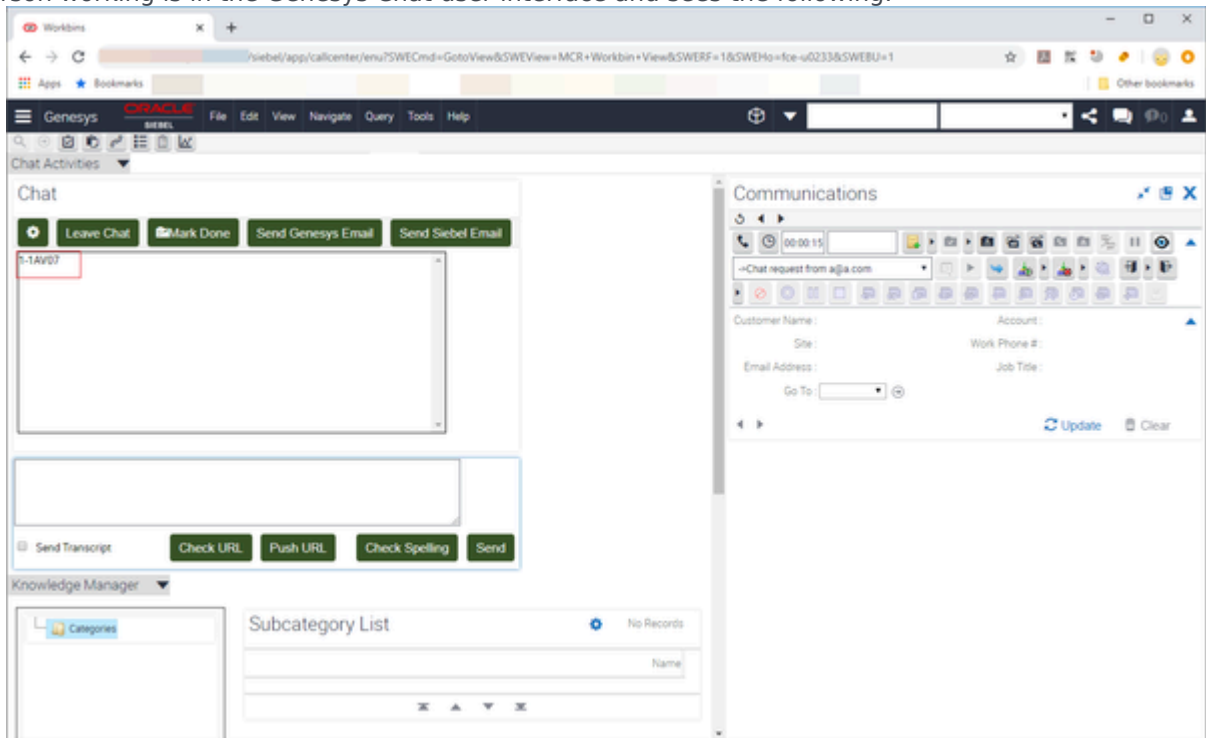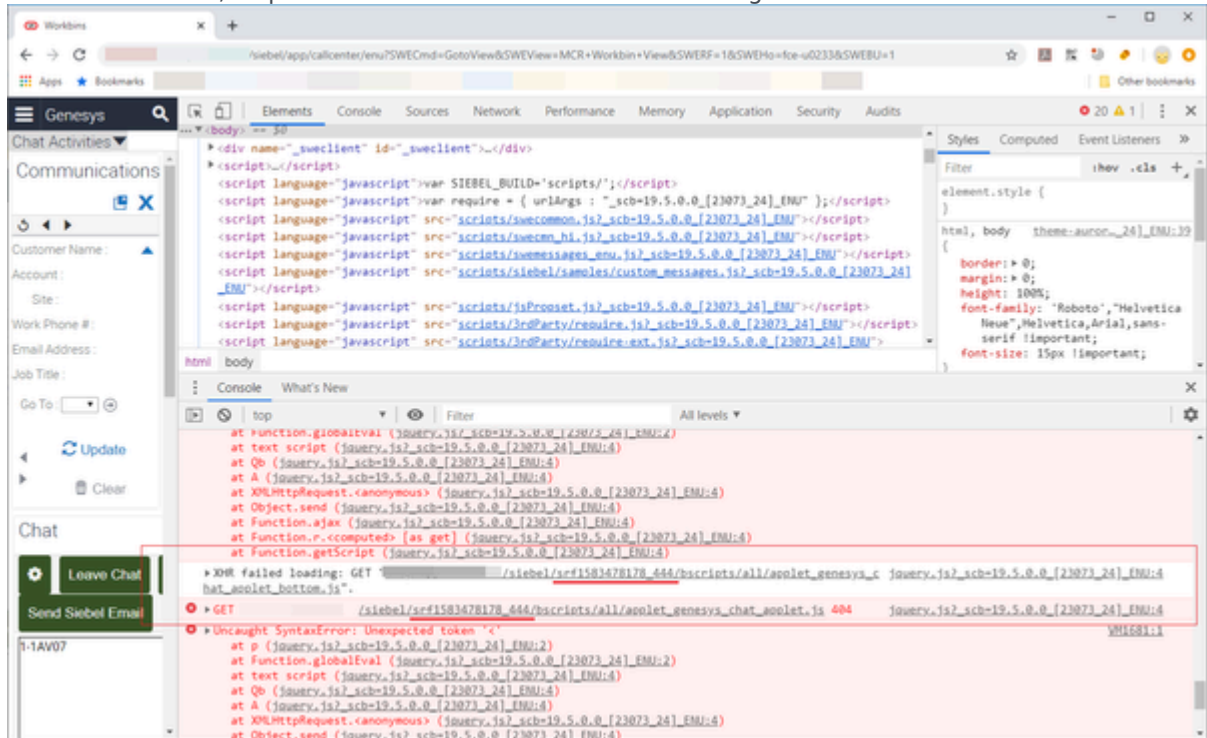

Chat UI - browser script issue

2. The person clicks Send and receives the following:

Send error

3. In the browser window, inspect the source for a 404 error indicating that a URL that can't be found.

Browser script error

In the graphic, notice that the srf1583478178_444 directory is expected to host browser scripts.

4. To resolve this, you must either (re)generate the scripts or rename the previous srfXXXXXX_XXX directory to srf1583478178_444.

> **Important**
>
> The Adapter currently only uses browser scripts in the Gplus Adapter for Siebel CRM Multimedia component.

Applying database changes

With Workspaces, the procedure to make Siebel database changes is more brief. Starting with Siebel IP 2017, Siebel Tools always works with a server database. So you don't need to reconnect to and/or copy any data to the server database.

When performing procedures like "Applying changes to the Siebel database tables," you only need to do the steps that directly relate to applying tables (that is, pressing the Apply button).

In addition, you can apply changes to the database regardless your workspace status, open or delivered.

Operating with workflows

When deployment procedures ask you to remove certain Siebel Workflow steps, just disconnect the step rather than remove it. Once workspaces were introduced in Siebel, it became impossible to remove workflow elements that do not belong to a current open workspace.

See *Siebel Open UI - Delete A Record When Using Workspaces (Doc ID 2189629.1)* (https://support.oracle.com/knowledge/Siebel/2189629_1.html) for details. Note that you need an Oracle account to access the article.

Importing LOV

In order to perform the LOV import procedure using Siebel Web Client (or simply modify the LOV), you must have an open workspace. However, changes made to LOV data are not visible in the object list as the workspace's modified objects.

So, if you created a special separate workspace for importing LOV only with no other changes, when you open that workspace, you will not see any changes in the object list. As such, immediately after you import the LOC, you just need remove that workspace (without delivering it).