PureConnect®

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See Change Log for summary of changes.

Genesys Cloud for PureConnect

Administrator's Guide

Abstract

Genesys Cloud for PureConnect Integration enriches your CIC users' experience by using the power and data of PureConnect and Genesys Cloud collaborative features. Genesys Cloud connects by means of a standard SCIM-based API. This API offers efficient user synchronization between both premise and cloud versions of PureConnect to Genesys Cloud. This integration enables PureConnect to consume services such as WebRTC, co-browse, and Salesforce Object Routing from Genesys Cloud.

For the latest version of this document, see the PureConnect Documentation Library at: http://help.genesys.com/pureconnect.

Table of Contents

About Genesys Cloud for PureConnect

Genesys Cloud is a cloud collaboration, communications, and customer engagement platform that takes full advantage of the distributed nature of the cloud. Configure Genesys Cloud for PureConnect in a few simple steps in Interaction Administrator.

PureCloud has a new name

The PureCloud product name is changing to **Genesys Cloud**. It will be a rolling change throughout 2020. Soon you will start to see product name and logo changes in product interfaces, installs, websites, documentation, and support tools. For more information, see *PureCloud to Genesys Cloud FAQs* on Genesys Community. Where appropriate, Genesys Cloud replaces the name PureCloud in this *Genesys Cloud for PureConnect Administrator's Guide*.

Bridge Server Replacement

Beginning with CIC 2019 R4, Genesys Cloud Bridge replaces Pure Bridge. The integration name is now Genesys Cloud for PureConnect to reflect this change in architecture. Some important things to note:

- Upgrading to CIC 2019 R4 from previous versions installs Genesys Cloud Bridge.
- Installing Genesys Cloud Bridge removes Pure Bridge from the CIC server.
- The integration installs Genesys Cloud Bridge only on the CIC server. Off-server bridge installation is no longer supported.

> **Note**: After upgrading to CIC 2019 R4 and deciding not to roll back to CIC 2019 R3, manually remove Pure Bridge from any off-server locations. Go to Windows **Control Panel** > **Add Remove Programs** > **Uninstall Pure Bridge server**.

- You still configure the integration in Interaction Administrator under System Configuration. However the container and associated dialog boxes are now labeled **Genesys Cloud** instead of PureCloud.
- After upgrading to CIC 2019 R4, it is possible to roll back to CIC 2019 R3 and use Pure Bridge. See How do I roll back to CIC 2019 R3 Bridge Server.

About the documentation

The *Genesys Cloud for PureConnect Administrator's Guide* explains to CIC administrators how to configure the Genesys Cloud for PureConnect Integration. Prior knowledge or experience with Genesys Cloud is not necessary.

PureConnect client application features

Several Genesys Cloud for PureConnect features are available in Interaction Connect and Interaction Desktop.

Genesys Cloud

Interaction Connect and Interaction Desktop users can access the full-featured Genesys Cloud in a browser tab and chat with Genesys Cloud users or share files. CIC agents can also complete their Genesys Cloud profiles. These agents start Genesys Cloud by clicking a **Collaborate** button in the PureConnect client. For more information, see *Genesys Cloud for PureConnect features* in the Interaction Connect help or the Interaction Desktop help.

Co-browse

The Co-browse feature is available only in Interaction Connect. This feature enables two or more people to view and interact with the same webpage simultaneously. An Interaction Connect user can use the Co-browse feature to give direct assistance to a visitor to your company's website. With the website visitor's consent, the agent takes full or limited control of the visitor's view of the webpage. The agent can interact directly with the webpage while talking to or chatting with the visitor. For more information, see Co-browse Requirements in the Interaction Connect help.

CIC Web-based phone

Interaction Connect users can use a web browser on a computer as a SIP telephone. The CIC web-based phone uses WebRTC as the communication protocol. This feature eliminates the need to distribute, install, and configure a physical IP telephone for each user. It also eliminates the need to install a SIP Soft Phone application on PCs. For more information, see Web-based Phone Requirements and Web-Based Phone in the Interaction Connect help.

Altocloud

Altocloud integrates with Interaction Connect. The integration supports both PureConnect Cloud and PureConnect on-premises customers. In the integration, a predictive engagement service hosted on the Genesys Cloud platform determines when to initiate a chat with a website visitor and which workgroup should handle the interaction based on current agent availability. Once Altocloud offers a chat, the chat interaction is created and routed just like any other interaction. For more information, see Interaction Connect and Altocloud in the Interaction Connect help and the Altocloud Integration Technical Reference.

WhatsApp

Administrators can create a WhatsApp channel in Interaction Connect. CIC routes direct messages on the WhatsApp account to the workgroups associated with the phone number on the WhatsApp account. Agents respond to a direct message interaction in the Interaction Connect **Current Interaction** view. This view creates a similar experience to a chat interaction. The interaction continues until the agent disconnects the interaction. If someone replies or comments in the same direct messaging thread after the agent disconnects the original interaction, PureConnect creates a new interaction. For more information, see the Interaction Connect help and the Social Media Technical Reference.

Genesys Cloud Conduit for PureConnect features

The Conversation Events plug-in monitors QueueManager updates, IVR, and wrap-up notifications and generates events per a common schema. The events are serialized using Avro serialization and are sent using Amazon Kinesis. To minimize the overhead, the plug-in accumulates events for a short time (500 ms) and sends multiple events in a single Kinesis PutRecords operation.

The Conversation Events plug-in supports six conversation events:

- ConversationAbandoned
- ConversationAgentConnected
- ConversationAgentWrappedup
- ConversationEnqueued
- ConversationIvrDisposed
- ConversationIvrMilestone

For more information about the conversation event data, see Appendix A: Common Conversation Event Data.

Genesys Cloud for PureConnect requirements

The Genesys Cloud for PureConnect integration is a requirement for **all** Genesys Cloud for PureConnect features and for the Genesys Cloud Conduit for PureConnect. The Genesys Cloud for PureConnect integration is free to PureConnect customers and includes Genesys Cloud features. Extra requirements, licensing, and fees apply to the Co-browse and CIC web-based phone features. For more information, see Advanced feature requirements, configuration, and setup. Enabling PureConnect to act as a Genesys Cloud Identity Provider also requires extra configuration, see Enable PureConnect as a Genesys Cloud SSO provider.

CIC requirements

Genesys Cloud for PureConnect integration requires CIC 2016 R3 or later.
- Advanced features like Co-browse and the web-based phone require later versions of CIC.
- Sync Advanced Platform Objects (workgroups, wrap-up codes, and skills) requires CIC 2020 R2 or later.
- Enabling PureConnect as a Genesys Cloud SSO (single sign-on) provider requires CIC 2020 R2 or later.

> **Note:** The currently available Genesys Cloud for PureConnect features are supported both for on-premises and PureConnect Cloud. The web-based phone feature requires a Genesys Cloud Edge server on the customer's premises.

Genesys Cloud organization

Your CIC server can integrate with only one Genesys Cloud organization. Your Genesys Cloud organization is created for you. You receive a welcome email to activate your admin account in Genesys Cloud. The Genesys Cloud organization is provisioned with the following:
- The base functionality required for your Genesys Cloud integration.
- An admin console you can use to configure your Genesys Cloud integration.
- A user with the Genesys Cloud Admin role, which includes default admin permissions, single sign-on, and any integration-specific permissions.

Make a note of these items in your Genesys Cloud organization:
- Administrator email address
- Administrator password
- Organization short name – generated from the organization long name, in compliance with DNS restrictions (a-z, 0-9, A-Z)
- Region

> **Note:** If you are unsure of the organization short name, log in to Genesys Cloud and navigate to **Admin>Account Settings>Organization Settings.** Both the organization long name and short name appear here.

PureCloudAdmin user

Before you configure Genesys Cloud for PureConnect, create the **PureCloudAdmin** user in Interaction Administrator. The Genesys Cloud organization administrator's name can be the same or different.

> **Note:** Previous versions of this integration created this user automatically. If the PureCloudAdmin user exists, you can continue to use it.

> **Important!** The CIC system employs the PureCloudAdmin user for the connection to Genesys Cloud and the associated Genesys Cloud Bridge connectors. The Genesys Cloud Bridge connectors use the PureCloudAdmin user credentials to establish the connection to the CIC server. Do not modify or delete the PureCloudAdmin user.

PureConnect Users

To sync properly, Genesys Cloud for PureConnect requires that PureConnect user accounts have the following information configured in the Users container:

- Personal Info tab>Internet tab>**Business Email**

> **Note**: If a user does not have a business email address, the integration does not sync that user to the Genesys Cloud organization.

We recommend you supply a display name.

- Personal Info tab>General tab>**Display Name**

> **Note**: If you do not supply a display name, it defaults to the user name. If you later add a display name, the integration updates the Genesys Cloud information.

After you configure the integration, you can change the values of these attributes in the Genesys Cloud Admin web interface.

We recommend that you configure the required (and optional) CIC user information before you configure Genesys Cloud for PureConnect. However, if you configure more users after you configure Genesys Cloud for PureConnect, the integration automatically syncs them for you.

User passwords and permission

If agents and administrators use Genesys Cloud for PureConnect integration, they do not need a Genesys Cloud password.

However, if the user chooses to log on manually to Genesys Cloud without using the integration, the user must create a Genesys Cloud password. CIC user passwords are separate from Genesys Cloud user passwords. They may be different passwords. If a user chooses a different password in Genesys Cloud, it does not affect their ability to log on to any CIC client.

CIC does not recognize Genesys Cloud roles and permissions. Genesys Cloud does not recognize CIC user security settings.

Genesys Cloud Bridge considerations

The Genesys Cloud for PureConnect configuration installs Genesys Cloud Bridge on the CIC server. Genesys Cloud Bridge manages the data transfer between the CIC server and Genesys Cloud.

> **Note**: As of CIC 2019 R4, the Genesys Cloud for PureConnect integration no longer supports off-server bridges.

Switchover

Configuring this integration on the active server in a Switchover pair automatically installs Genesys Cloud Bridge on both the active and backup servers. The bridge operates independently from the active and backup CIC servers.

If the backup server is when you configure this integration, it installs the bridge on the backup server the next time you start CIC.

If the primary CIC server stops, but the computer itself is healthy and running, then the bridge on that computer automatically talks to the new Primary CIC server after the switchover completes.

Types of information synced to Genesys Cloud

By default, Genesys Cloud for PureConnect syncs user information to Genesys Cloud. You can choose to sync workgroups, wrap-up codes and skills to your Genesys Cloud organization.

> **Tip**: To check the health of the integration and the synchronization status of selected records, see these topics: How do I check Genesys Cloud Integration status and activity and How do I check synchronization status for selected records.

Users

Genesys Cloud for PureConnect syncs the following CIC user information to the Genesys Cloud organization:

- Display name (Defaults to user name if not supplied)
  PureConnect **User Configuration**>**Personal Info** tab>**General** tab> **Display Name**

- Email address (required)
  PureConnect **User Configuration**>**Personal Info** tab>**Internet** tab>**Business Email**

- Business phone and Business 2 phone (Work Phone and Work Phone 2 in Genesys Cloud)
- Mobile phone (Cell Phone in Genesys Cloud)
- Home phone
- Fax number (Other Phone in Genesys Cloud)

We recommend you configure the required (and optional) CIC user information before you configure Genesys Cloud for PureConnect. However, if you configure more users after you configure Genesys Cloud for PureConnect, the integration automatically syncs them for you.

Advanced Platform Objects

Advanced Platform Objects include workgroups, wrap-up codes, and skills. Synchronization is **one way only**. Additions, changes, and deletions made in PureConnect sync to the corresponding Genesys Cloud objects. However, additions, changes and deletions made to Genesys Cloud queues, skills, and wrap-up codes do not sync to PureConnect.

Workgroups

- PureConnect workgroups sync to Genesys Cloud queues.
- Adding or deleting a PureConnect workgroup, adds or deletes the matching Genesys Cloud queue.
- Users belonging to PureConnect workgroups are assigned to the appropriate Genesys Cloud queues.
- Adding or deleting users from PureConnect workgroups updates the matching Genesys Cloud users' list of queues.

Skills

- PureConnect **skills** sync to Genesys Cloud ACD skills.
- Skills assigned directly to users or inherited from workgroup membership sync to the corresponding Genesys Cloud users.
  For example, if a user has the "Marketing" skill assigned to them and is also a member of a workgroup with a "Development" skill assigned to it, the resulting Genesys Cloud user has both a "Marketing" and "Development" skill.

- The ACD Skills tab in the Genesys Cloud user's menu bar displays the skill assigned to the user in Interaction Administrator.
- The PureConnect skill proficiency (1-100) maps to the Genesys Cloud rating (1-5 stars).
- The PureConnect **Treat as Language** check box controls whether a skill's **ACD Skills Category** is **Skills** or **Languages** in Genesys Cloud.
- After synchronization, selecting or clearing a skill's **Treat as Language** check box, also changes the skill's Category in Genesys Cloud.
- Adding or removing a skill from a PureConnect user, adds or removes that skill from the matching Genesys Cloud person.
- Deleting a PureConnect skill, deletes the matching Genesys Cloud skill.

Wrap-up Codes

- PureConnect wrap-up codes sync to Genesys Cloud wrap-up codes.
- Only PureConnect wrap-up code **names** sync to Genesys Cloud. Genesys Cloud wrap-up codes do not have code labels, categories, or other PureConnect wrap-up code attributes.

- Wrap-up codes associated with PureConnect workgroups sync to the matching Genesys Cloud queue.
- Adding or deleting a PureConnect wrap-up code, adds or deletes the matching wrap-up code in Genesys Cloud.

Communication and data flow diagram
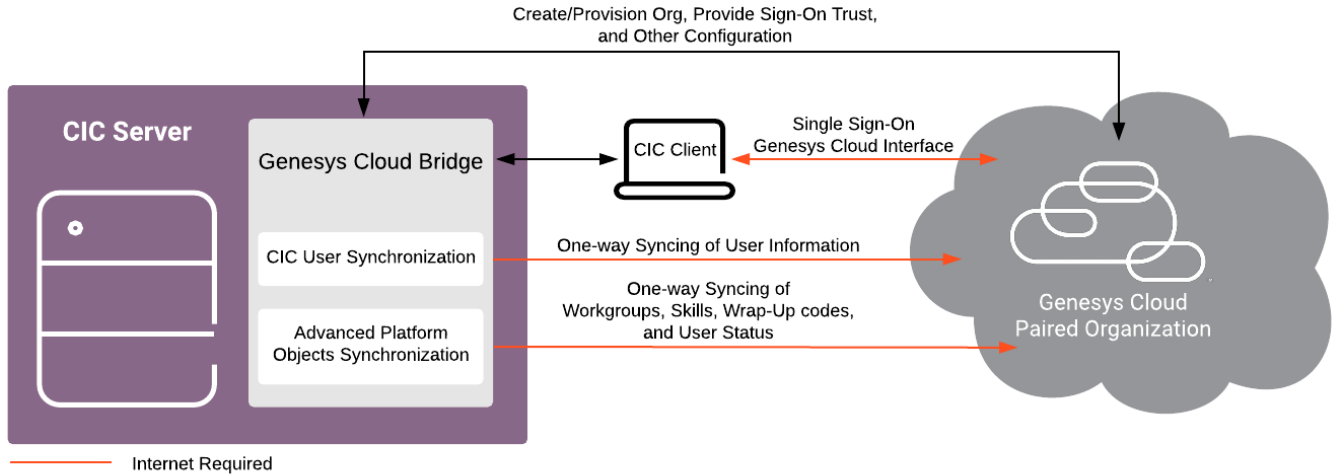
Cloud Bridge Communication and Data Flow diagram

CIC provides communication services to enable the Genesys Cloud for PureConnect integration.

- Genesys Cloud Bridge securely communicates with Genesys Cloud. The paired Genesys Cloud organization is trusted for Single Sign-on.
- Genesys Cloud Bridge securely communicates with the CIC client to provide a Single-Sign-on SAML assertion so that users can automatically log on to their Genesys Cloud account.
- Genesys Cloud for PureConnect configuration automatically installs and configures Genesys Cloud Bridge on the CIC server.
- Genesys Cloud Bridge shares configurable user information with the Genesys Cloud organization using a standard SCIM-based API.
- Optionally, Genesys Cloud Bridge can synchronize workgroup, skills, and wrap-up codes with the paired Genesys Cloud organization.

> **Note**: Synchronization of these Advanced Platform Objects is one way only. Additions, changes, and deletions made in PureConnect sync to the corresponding Genesys Cloud objects. However, additions, changes and deletions made to Genesys Cloud queues, skills, and wrap-up codes do not sync to PureConnect.

When the Genesys Cloud for PureConnect integration is complete, the Genesys Cloud Bridge on the CIC server securely synchronizes gathered information to the paired Genesys Cloud organization.

Genesys Cloud for PureConnect configuration

When you configure Genesys Cloud for PureConnect, you are provisioning the CIC system to work with Genesys Cloud. You perform this configuration in Interaction Administrator.

For more information, see the following:

- Configure Genesys Cloud for PureConnect
- Configure Genesys Cloud Synchronization Options
- Configure Genesys Cloud Skill synchronization
- Configure Genesys Cloud Browser Client Applications
- Configure Genesys Cloud Dial Groups
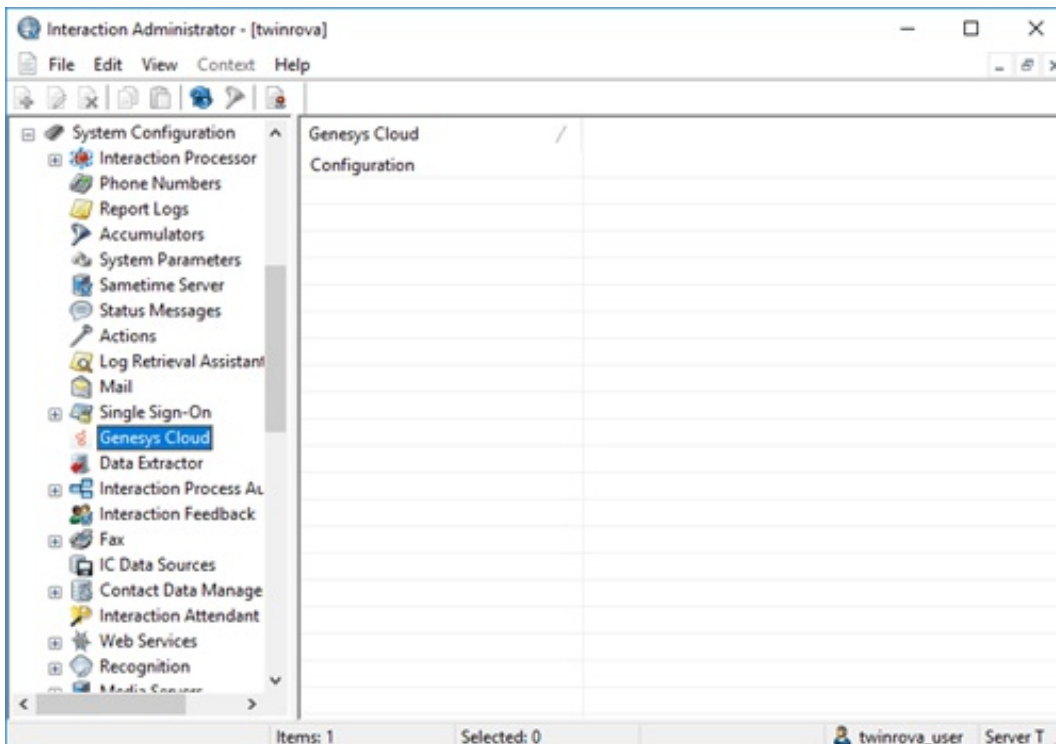- Configure Your Genesys Cloud Organization

Configure Genesys Cloud for PureConnect

When you configure Genesys Cloud for PureConnect in Interaction Administrator, you accomplish these tasks:

- Enter administrator and organization information needed for connection to an existing organization.
- Install Genesys Cloud Bridge to sync user data.
- Optionally, select **Send AI Conversation Events** to send selected interaction data to Genesys Cloud.

To configure Genesys Cloud for PureConnect

1. Review Requirements, including the CIC user configuration requirements.
2. In Interaction Administrator, open **System Configuration > Genesys Cloud.**

3. On the right side, double-click **Configuration**.
4. In the **Genesys Cloud Configuration** tab, select the **Enable Genesys Cloud Integration** check box.

   A message prompts to confirm that you understand that CIC user information will be synced to a paired Genesys Cloud organization. Click **Yes** to proceed. The configuration fields in the **Genesys Cloud Configuration** tab are enabled.

   > **Note:** Click **No** if you want to configure more CIC user information before configuring Genesys Cloud for PureConnect. Or click **No** if you do not want to configure Genesys Cloud for PureConnect now.

5. Optionally, to send conversation event (interaction) data from PureConnect to Genesys Cloud, select the **Send AI Conversation Events** check box.
6. Enter the Genesys Cloud organization administrator email address, password, and Genesys Cloud organization short name. Select a region.

13
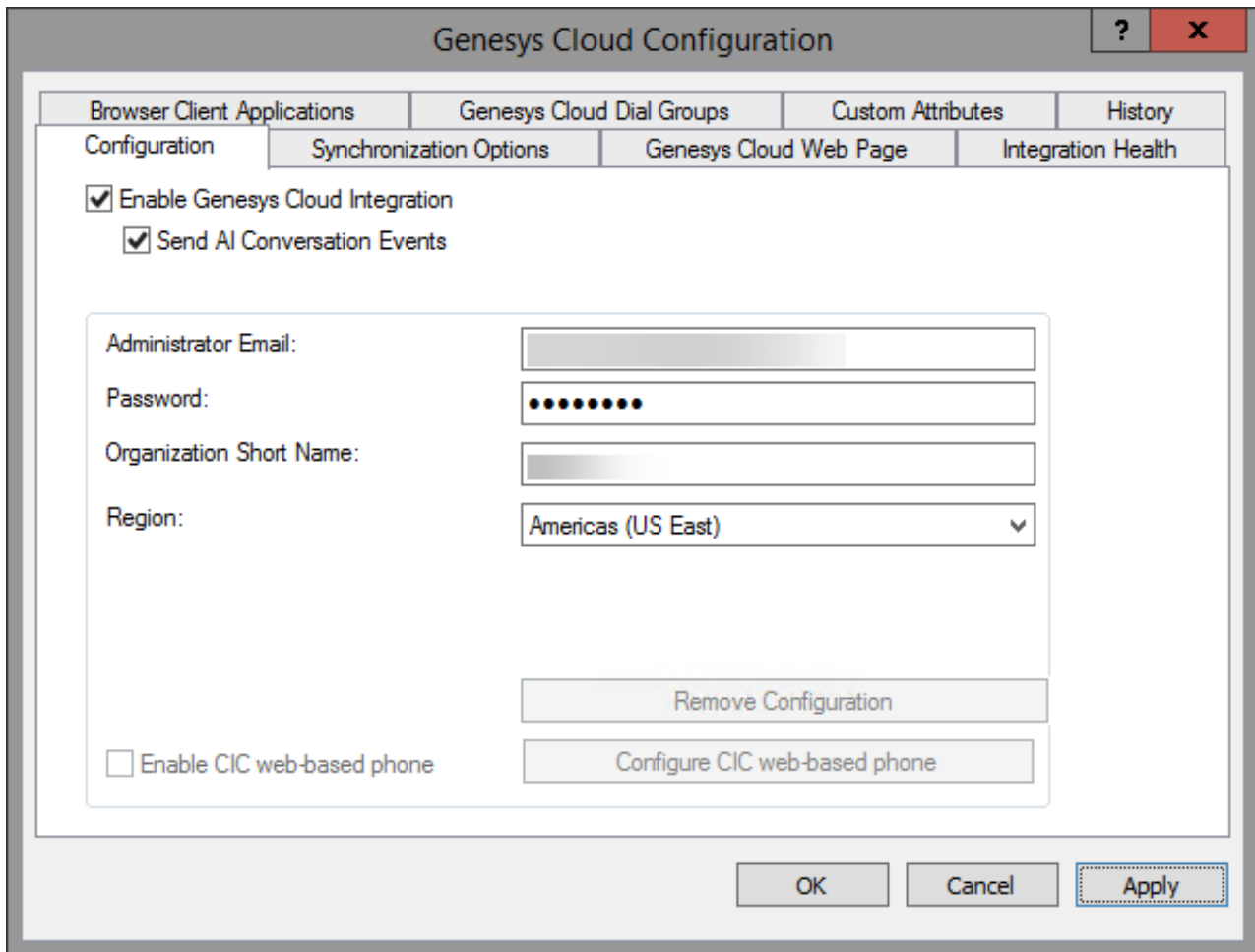
a. In the **Administrator Email** box, type the email address for the Genesys Cloud organization administrator.

> **Tip**: We recommend giving the administrator an administrative or IT-related distribution email address, instead of a personal email address.

b. In the **Password** box, type the Genesys Cloud organization administrator's password.

c. In the **Organization Short Name** box, type the short name for the existing Genesys Cloud organization.

> **Note**: User information is synced to this organization. If you are unsure of the organization short name, log in to Genesys Cloud and navigate to **Admin**>**Account Settings**>**Organization Settings**.

d. In the **Region** list, select the closest region to your organization's location.

> **Note**: The default is **North America**. User access to Genesys Cloud is routed to the location of the Amazon data center for this region, whether users are in the office, at home, or traveling.

7. In the Genesys Cloud Configuration tab, click **Apply**.
8. A message prompts you to confirm that you want to proceed to provision the organization. Click **Yes** to populate the Genesys Cloud organization with your CIC users.
9. A message confirms that the Genesys Cloud integration was successfully configured. Click **OK**.
10. A message confirms the successful connection to Genesys Cloud.

> **Note:** If the Genesys Cloud Connection fails, try to log on to your Genesys Cloud organization manually using https://login.mypurecloud.com. (The address is different for regions outside North America East.) If you can log on successfully, then the root cause of the problem may lie with the CIC to Genesys Cloud SSO trust. If that is the case, you can reprovision the integration by disabling and then re-enabling the integration. For more information, see How do I re-provision the Genesys Cloud for PureConnect Integration.

Configure Genesys Cloud Synchronization Options

This page lets you select the kinds of information synced to your Genesys Cloud organization. For more information, see also Types of information synced to Genesys Cloud.

1. In Interaction Administrator, open **System Configuration > Genesys Cloud**.
2. On the right side of the view, double-click **Configuration**.
3. In the Genesys Cloud Configuration dialog, select the **Synchronization Options** tab.

> **Note**: **Sync User Objects** is selected by default when you enable Genesys Cloud Integration.
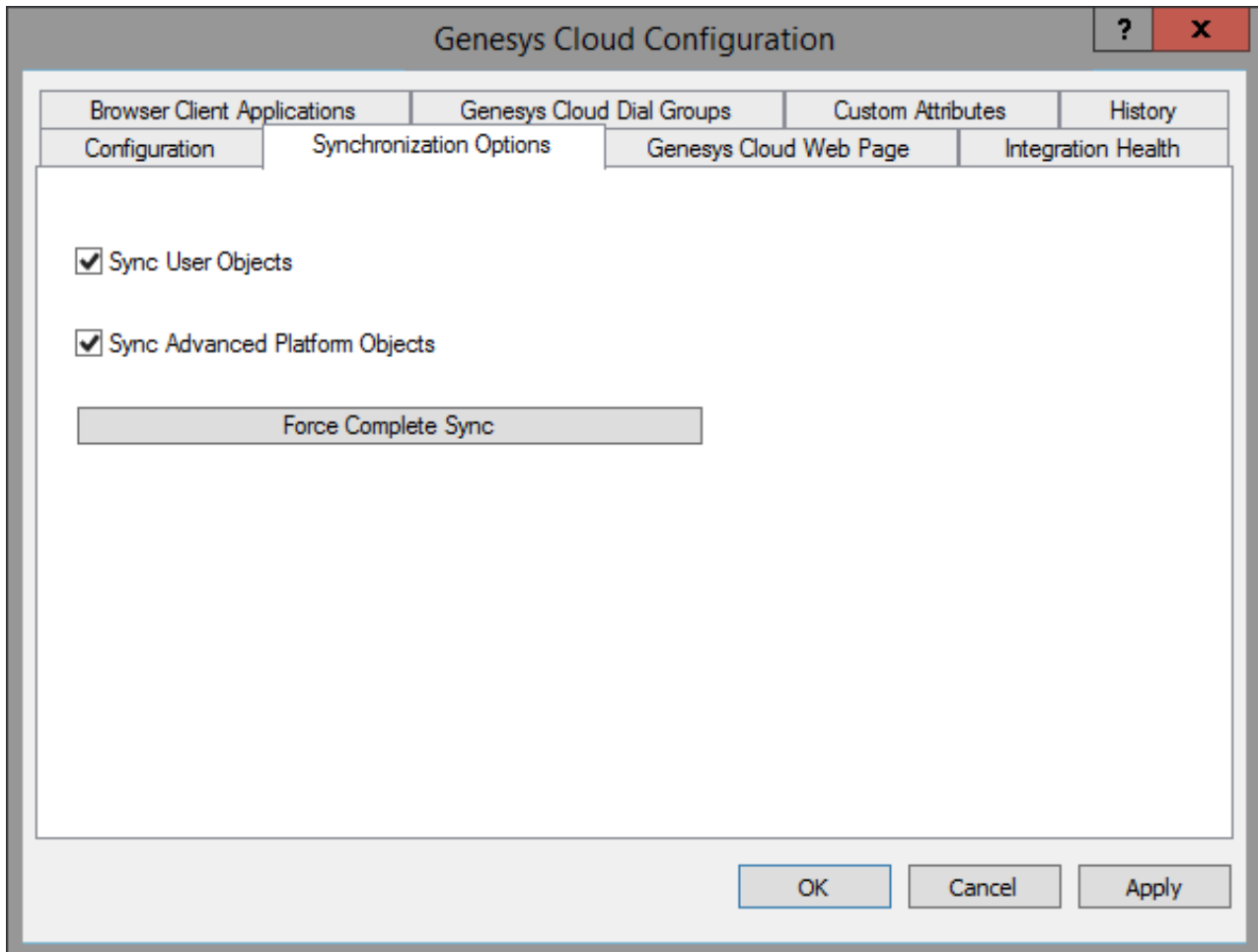
4. Optionally, select **Sync Advanced Platform Objects**.

   This option syncs workgroups, wrap-up codes, and skills to your Genesys Cloud organization. Synchronization is **one way only**. Additions, changes, and deletions made in PureConnect sync to the corresponding Genesys Cloud objects. However, additions, changes and deletions made to Genesys Cloud queues, skills, and wrap-up codes **do not sync** to PureConnect.

5. Click **Apply**.

6. Optionally, click **Force Complete Sync**.

   This action starts a full synchronization of the selected objects. The synchronization occurs regardless of whether it is already up to date.

Configure Genesys Cloud Skill synchronization

If you enable the Genesys Cloud for PureConnect Integration and select the **Sync Advanced Platform Objects** option, this page displays the synchronization status for a skill. You also decide whether this skill is classified as a language in Genesys Cloud.

> **Note**: Skills assigned directly to users or inherited from workgroup membership sync to the corresponding Genesys Cloud users. More synchronization information is available in the [Integration Health](#) page in the Genesys Cloud Configuration dialog box.

To configure Genesys Cloud skill synchronization:

1. In Interaction Administrator, open **People** > **Skills**.
2. In the **Skills** window, select a skill.
3. In the details view of the **Skills** window, click the **Genesys Cloud** tab.
4. Optionally, view synchronization status.

   ## Status

   Synced status indicates that the selected skill successfully synced to your Genesys Cloud organization. **Error** indicates that synchronization failed. **Not synced** means synchronization was not attempted.

   ## Last Synchronized

   This is the date and time of the last successful synchronization.
5. Do one of the following:
   - To set **Languages** as the Genesys Cloud ACD Skills Category, select **Treat as a Language**.
   - To set **Skills** as the Genesys Cloud ACD Skills Category, clear **Treat as a Language**.
6. Click **Save**.
7. Repeat for each skill.

Configure Genesys Cloud Browser Client Applications

Configure the URIs of Interaction Connect or other browser-based client applications that use Genesys Cloud integrations. This setting enables an application to use the Genesys Cloud API from a web browser.

> **Required:** The WebRTC and Co-browse integrations in Interaction Connect require URI configuration. The PureConnect for Salesforce's WebRTC integration does not URI configuration. PureConnect for Salesforce itself is hosted from Genesys Cloud origins. Those origins are automatically allowed when the organization is provisioned for you.

1. In Interaction Administrator, open **System Configuration > Genesys Cloud**.
2. On the right side of the view, double-click **Configuration**.
3. In the Genesys Cloud Configuration dialog box, select the **Browser Client Applications** tab.
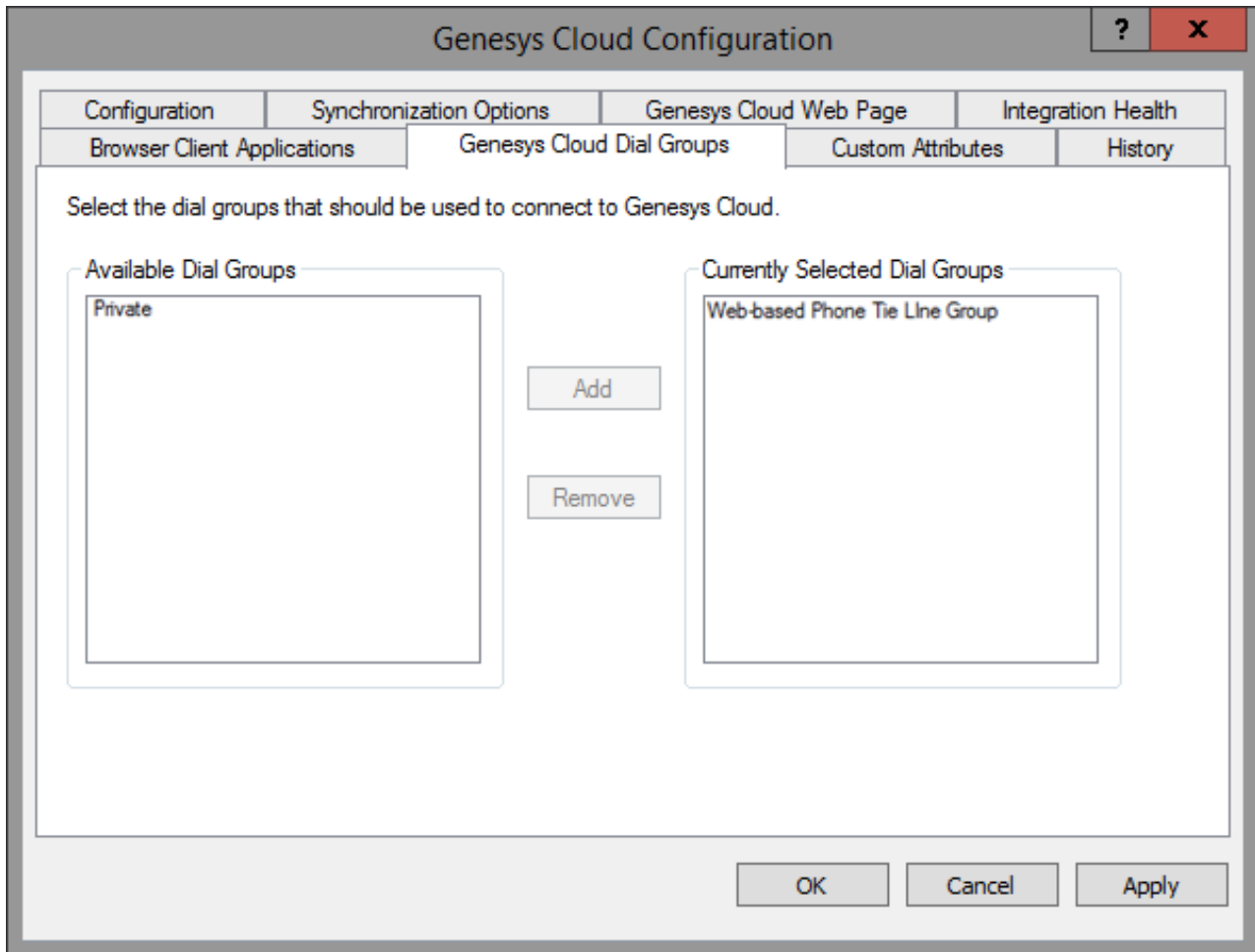

4. Do one of the following:
   - To add a URI, type it in the text box and click **Add**.
   - To remove a URI, select it in the list and click **Remove**.
5. Click **Apply**.

Configure Genesys Cloud Dial Groups

The Genesys Cloud Dial Groups tab enables you to select the dial groups for the Web-based phone integration. Connection calls are placed to the Genesys Cloud Edges using these dial groups.

1. In Interaction Administrator, open **System Configuration > Genesys Cloud.**
2. On the right side of the view, double-click **Configuration**.
3. In the **Genesys Cloud Configuration** dialog box, select the **Genesys Cloud Dial Groups** tab.

4. To select the dial groups for communicating with Genesys Cloud Edges, do either of the following
   - To add a dial group, select a dial group from the **Available Dial Groups** list and click **Add**.

     > **Note:** This list displays the existing dial groups on this CIC server.

   - To remove a dial group, select a group from the **Currently Selected Dial Groups** list and click **Remove**.

     > **Note:** CIC uses the dial groups in this list to communicate with Genesys Cloud Edges for the Web-based phone integration.

5. Click **Apply**.

Configure your Genesys Cloud Organization

Configure your organization

You can access your Genesys Cloud administrative interface directly from Interaction Administrator. See Start Genesys Cloud from Interaction Administrator.

With your Genesys Cloud organization successfully provisioned and CIC user information synced within the organization, familiarize yourself with Genesys Cloud Admin features and configure your organization.
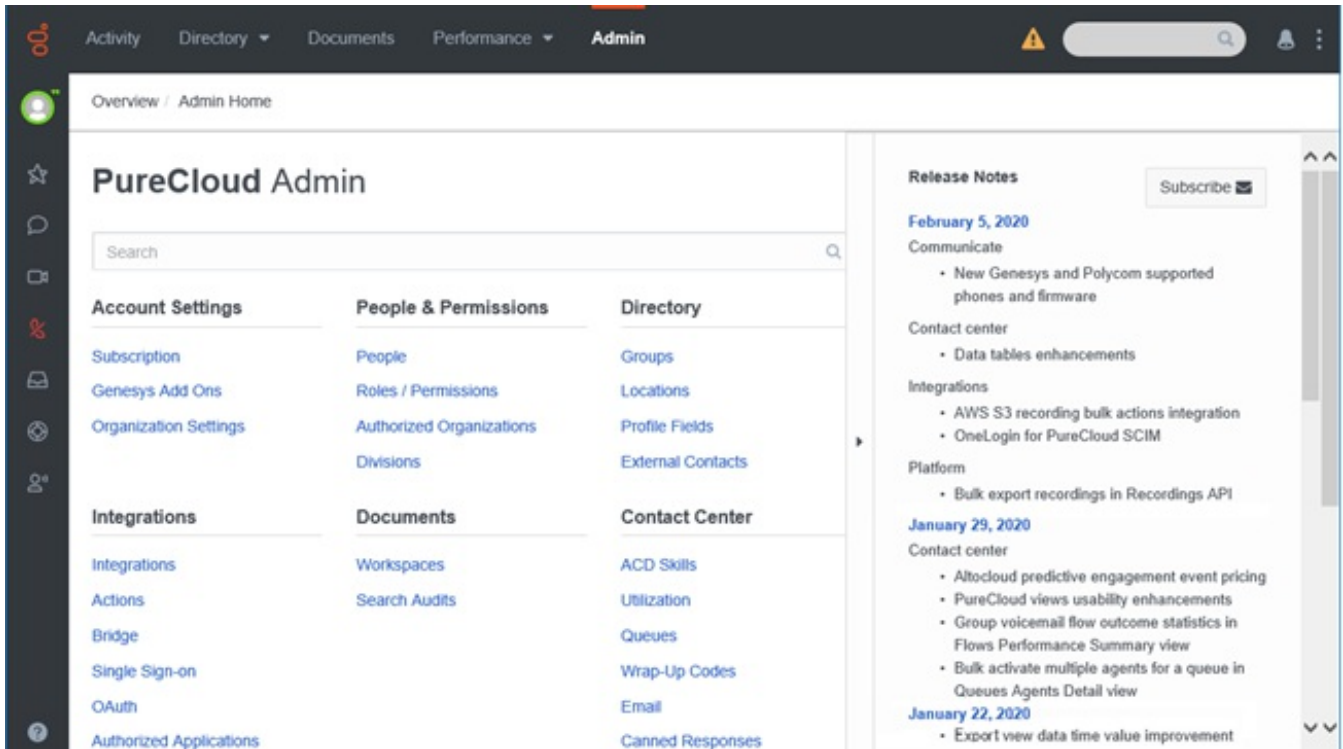
In the **Admin** menu:

- **Overview** – Proceed through administration setup tasks step by step.
  Further configure your organization by adding to the Genesys Cloud Admin profile, setting up groups, and more.
- **Account Settings** – Configure organization-wide account settings.
- **People and Permissions** – Manage people in your organization and their permissions for various Genesys Cloud functions.

  Tip: Select **People** from the **People & Permissions** menu.

  If you configured CIC user accounts with **Business email** addresses before you configure the integration, Genesys Cloud for PureConnect syncs CIC user account data. Those users then appear in the Genesys Cloud directory.

  If you integrate PureConnect with a Genesys Cloud organization that already contains Genesys Cloud users, synchronization adds the CIC to the Genesys Cloud Directory. The CIC users co-exist with the existing Genesys Cloud-only users.
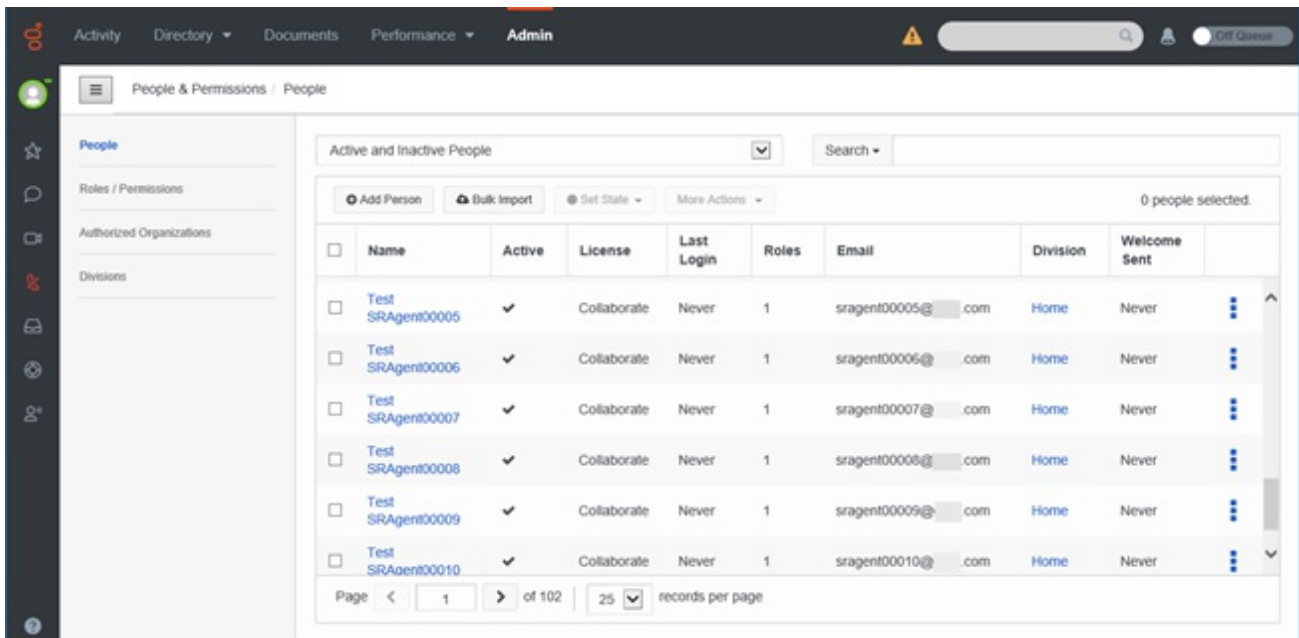
- **Directory** – Set up groups, locations, skills, and profile layouts and labels.
- **Integrations** - Review Genesys Cloud settings and check for updates.

- **Documents** – Administer storing, organizing, and sharing all types of files securely with Genesys Cloud's enterprise-level content repository.

For more information

Access the Genesys Cloud Resource Center at https://help.mypurecloud.com/ or click the question mark in the lower left corner. The Resource Center contains context-sensitive help and also enables you to access articles, videos, FAQ's, Genesys Cloud Release Notes, and more.
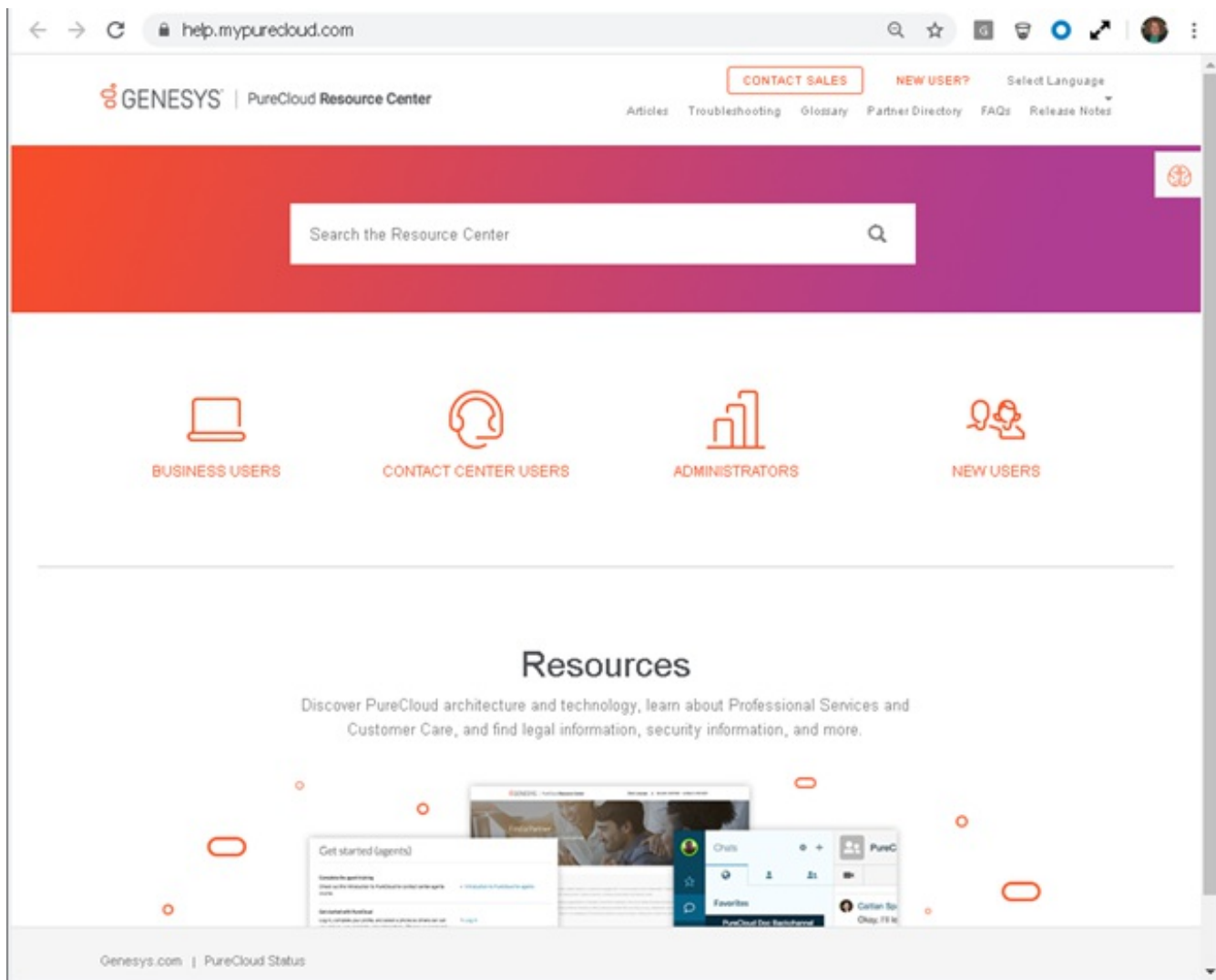
Enable PureConnect as a Genesys Cloud SSO provider

This section describes how to change your PureConnect deployment to be an Identity Provider for Genesys Cloud. This enables PureConnect users to employ their PureConnect user IDs and passwords to log on to Genesys Cloud from a browser. PureConnect users do not then need separate Genesys Cloud user IDs and passwords.

> **Note**: If your users log on to Genesys Cloud by means of ADFS, Ping, or other SSO Identity Provider, you do not need to enable PureConnect as a Genesys Cloud SSO provider. Configure the selected SSO provider in Genesys Cloud.

Languages

Only PureConnect's supported languages are available in the logon dialog where users provide CIC credentials. These languages are a subset of Genesys Cloud's supported languages. Verify that your required language is available. Currently, PureConnect does not support Finnish or Thai while Genesys Cloud supports them. In the future, Genesys Cloud might add other languages that PureConnect does not support.

Requirements

- CIC 2020 R2 or later.
- You must use the Genesys Cloud for PureConnect integration and sync PureConnect users to Genesys Cloud.
- This integration synchronizes the users' email addresses between PureConnect and Genesys Cloud. This synchronization enables the users to authenticate with PureConnect credentials. For more information about enabling the integration, see Genesys Cloud for PureConnect configuration.
- Administrators must configure PureConnect as an SSO Identity Provider in Genesys Cloud.
  For more information, see Add PureConnect as a single-sign on provider.
- Administrators or network engineers must configure your PureConnect environment to support PureConnect as an SSO Identity Provider.

Configure PureConnect environment

This section describes how to configure your PureConnect environment to support PureConnect as an Identity Provider for Genesys Cloud.

Add rewrite rules to your proxy server's configuration. The values in these rules must match the settings in the Genesys Cloud configuration of PureConnect as an SSO provider. These rules are an example of the changes made to an Nginx configuration file.

```
events {    worker_connections  1024; } # Overview: # This is an example proxy configuration
file for Nginx, showing how to leverage the # PureConnect CIC server for use by Genesys Cloud as
an SSO IdP. # # This proxy configuration accomplishes a couple of goals: # 1) Serve as a load
balancing proxy to route to the PureConnect CIC server switchover pair, #    whichever one is
the primary at the time. # 2) Rewrite the endpoint presented (e.g. to Genesys Cloud) into the
endpoint expected #    by the PureConnect STS subsystem. #    Rewrite from: #
    https://appserver.xyzcorp.com:443/PureConnect/ICNotifierIDP/login?loginType=saml #
        Format: https://[A]:[B]/[C]/[D...] #                          A) Customer's chosen endpoint for
this proxy #                   B) Exposed proxy port, from below #                    C) Friendly
URL path component, from below. #                    D) Suffixes required by PureConnect STS
subsystem IdP #                  Note: in the Genesys Cloud Generic SSO Provider
configuration, #                  this must be "ICNotifierIDP/login?loginType=saml" #
    Rewrite to:    https://10.1.2.3:8043/ICNotifierIDP/login?loginType=saml #                  [or
10.1.2.4, as per automatic load balancing] #        Format:    https://[E]:[F]/[D...] #
              E) One of the PureConnect servers from the configuration below. #
              F) The PureConnect STS subsystem port, 8043. #                  D) Must match
the suffixes from before the rewrite. http {    # This section specifies the PureConnect CIC
server switchover machines.    # The upstream ID must match the "proxy_pass" below.
    upstream pureconnect_servers {        # PureConnect CIC server switchover pair IP addresses
        # The port must be 8043, for the PureConnect STS subsystem.        server
10.1.2.3:8043; # switchover server 1 [note: example IP address]        server 10.1.2.4:8043; #
switchover server 2 [note: example IP address]                ip_hash; # used for sticky sessions
if preferred nginx Plus not available.      # sticky cookie srv_id expires=1h;   # requires
nginx Plus 1.5.7    }    # This proxy server accepts all traffic to the specified port and
passes it    # to the upstream servers.    server {        # Note: A different port may be
used, based on customer environment needs.        # The port must match the value used in the
Genesys Cloud SSO configuration        # for "Target URL".        listen 443 ssl;
       # The certificate that should be presented to Genesys Cloud.        # This should be
trusted by the client workstations/browsers that will        # use SSO to authenticate.
        ssl_certificate    CustomerProxyCertificate.cer;        ssl_certificate_key
CustomerProxyPrivateKey.bin;        # For this example, the rewrite rule strips out a friendly
URL path component of       # "PureConnect", before passing it along to the PureConnect CIC
server        # switchover pair.        # This friendly component is not required and it can
be changed, as long as       # matching changes are made to the rules below.        location
/PureConnect/ {          if ($http_inin_remap_base_url !~ .+) {            # This
specifies the friendly URL component, so that subsequent SAML            # protocol
redirects reflect it correctly.              set $http_inin_remap_base_url
$scheme://$http_host/PureConnect;          }            # This strips out the
friendly URL component.          rewrite ^/PureConnect/(.*)$ /$1 break;
        # Set headers that allow the SAML protocol's redirects and responses to pass
        # through the proxy correctly.          proxy_set_header ININ-REMAP-BASE-URL
$http_inin_remap_base_url;         proxy_set_header X-Forwarded-For
$proxy_add_x_forwarded_for;            # The proxy_pass value must match the
upstream ID above.          proxy_pass https://pureconnect_servers;          # For this
example, we choose to use the nginx host as the provider's issuer         # URI for Genesys
Cloud SSO configuration.          # This value could be changed as per the customer's
preference, as long at the         # Genesys Cloud Generic SSO          # "Provider's
Issuer URI" value matches and is of the form:         #     https://[Host value from below]
          proxy_set_header Host $host;         }      } }
```

Advanced feature requirements, configuration, and setup

Information for advanced features is available in the Interaction Connect help in the PureConnect Documentation Library (version 2017 R2 or later).

For more information, see the following:

CIC web-based phone

- CIC web-based phone requirements
- CIC web-based phone processing
- CIC web-based phone limitations
- Configure CIC web-based phone feature

Co-browse

- Co-browse requirements
- Co-browse Configuration and Setup Overview

Altocloud

- Altocloud Integration Technical Reference
- Interaction Connect and Altocloud

WhatsApp

- PureConnect Social Media Technical Reference
- Managing Social Media
- WhatsApp Direct Messages

Single sign-on Genesys Cloud

After you complete Genesys Cloud for PureConnect configuration:

- Administrators can start Genesys Cloud directly from Interaction Administrator.
  For more information, see Start Genesys Cloud from Interaction Administrator.

- Agents can start Genesys Cloud directly from Interaction Connect or Interaction Desktop.
  For more information, see Start Genesys Cloud from a PureConnect client.

- Administrators and agents can use PureConnect credentials to start Genesys Cloud from a browser.
 For more information, see Start Genesys Cloud with PureConnect Credentials.

  Note: Enabling PureConnect to act as a Single Sign-on Provider (SSO) requires both Genesys Cloud and network configuration. For more information, see Enable PureConnect as a Genesys Cloud SSO provider.

Start Genesys Cloud from Interaction Administrator

Access your Genesys Cloud administrative interface directly from Interaction Administrator. If you configure CIC user accounts with **Business email** before you configure the integration, Genesys Cloud for PureConnect syncs CIC user account data. Those users then appear in the Genesys Cloud directory.

To start Genesys Cloud from Interaction Administrator:

1. In the Genesys Cloud Configuration dialog box, select the **Genesys Cloud Web Page** tab.
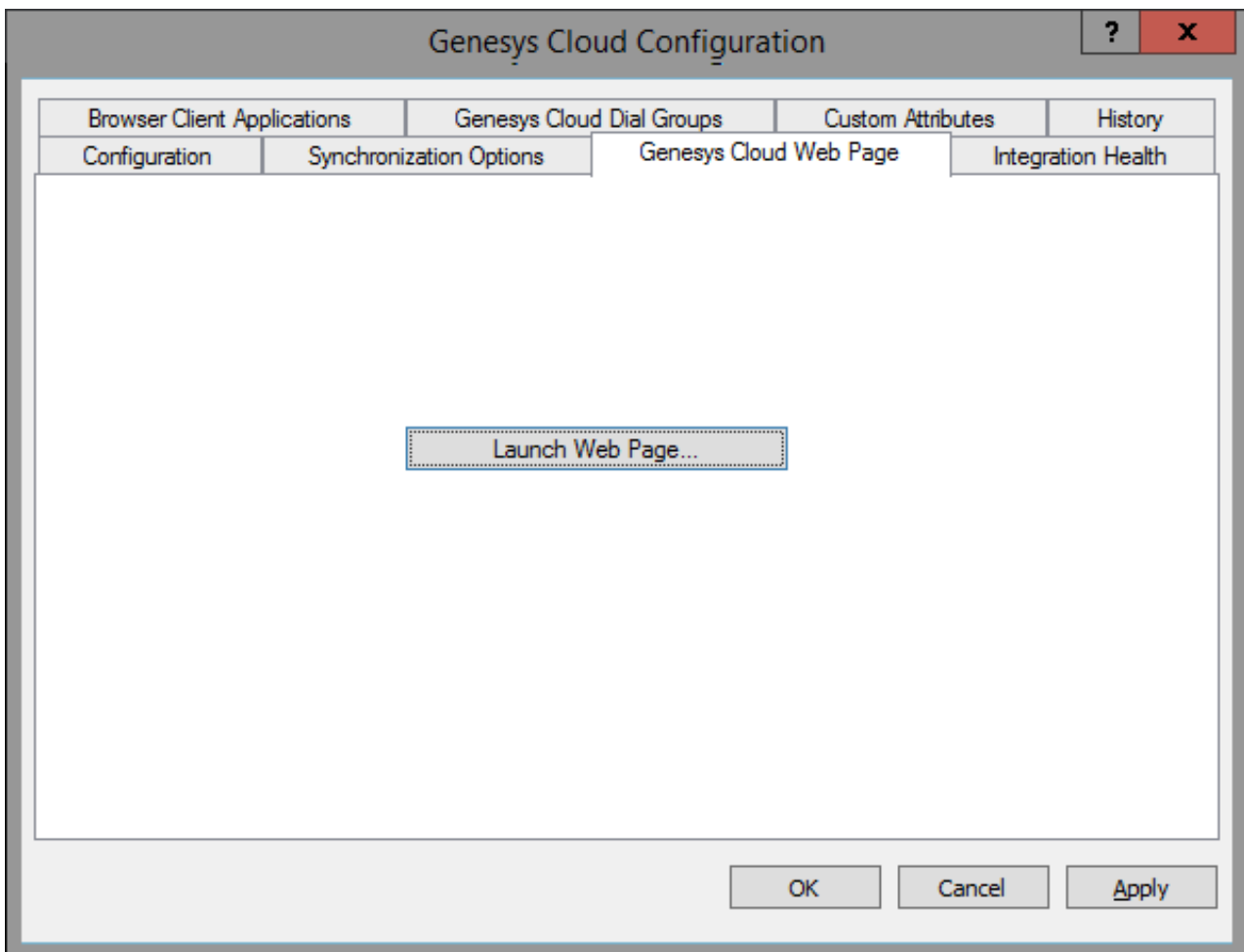
2. Click **Launch Web Page.**
3. If prompted, select the browser you want to use.
4. Genesys Cloud opens and automatically logs you in as the Genesys Cloud Admin user.
   Genesys Cloud opens to the administrative interface.

Tip: For more information about using this interface, see Configure Your Genesys Cloud Organization.

Start Genesys Cloud from a PureConnect client

After you complete [Genesys Cloud for PureConnect configuration](#), Interaction Connect and Interaction Desktop client users can use the **Collaborate** button for single sign-on to Genesys Cloud.

1. Click the **Collaborate** button.
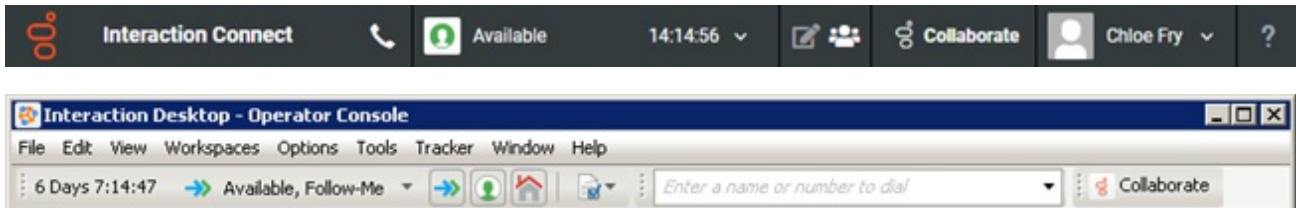
2. The user automatically logs on to Genesys Cloud.
3. Genesys Cloud appears in a new browser tab.
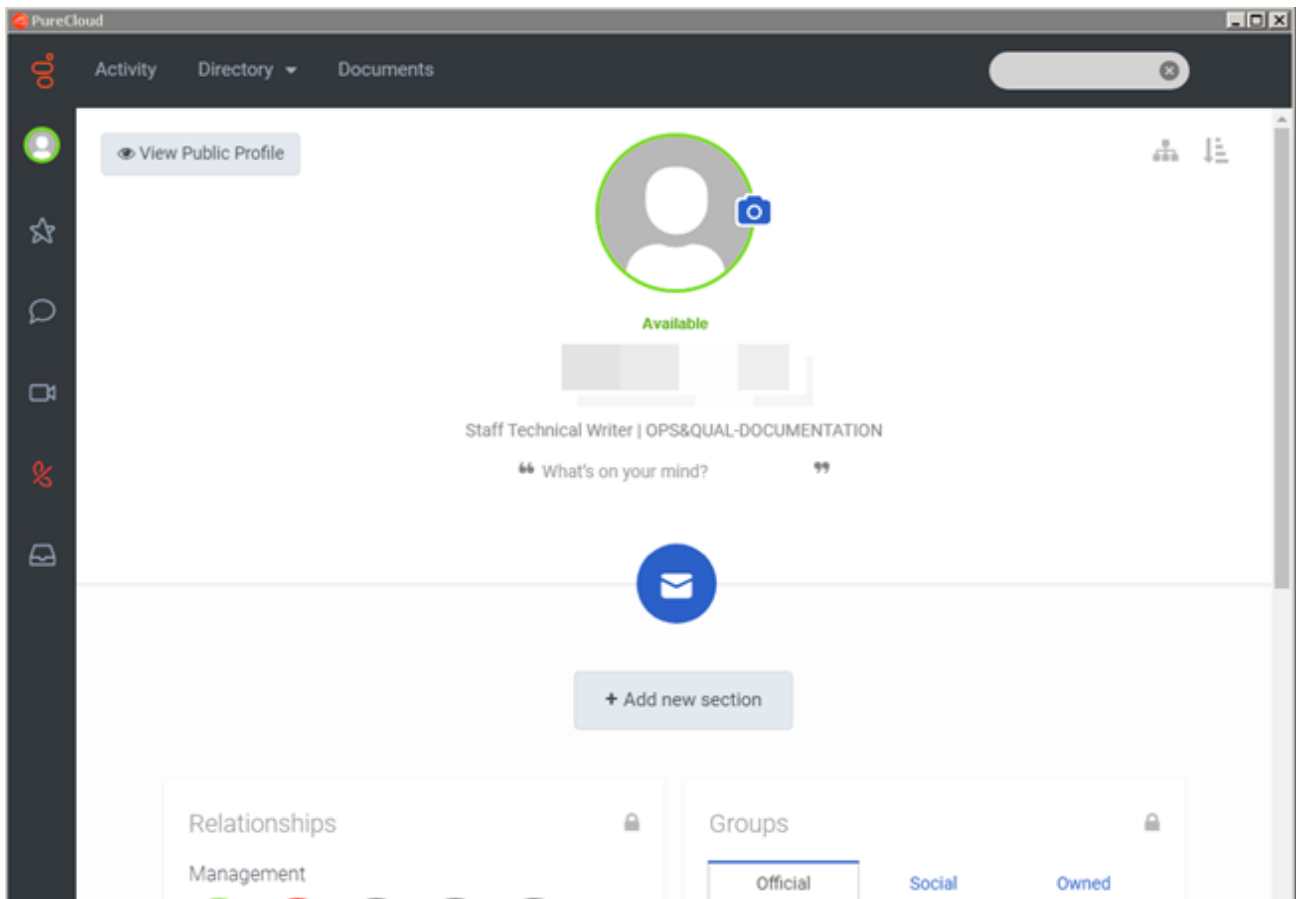
Explore Genesys Cloud

Encourage users to explore Genesys Cloud. Here are a few things users can do:

- **Profiles** – Complete user profile – add contact information, photo, and more. Set user status.
- **Search** – Search across the directory for individuals and groups in the organization
- **Hierarchy views** – Browse the structure of the organization
- **Documents** – Store, organize, and share files with other users

Future releases will contain more features.
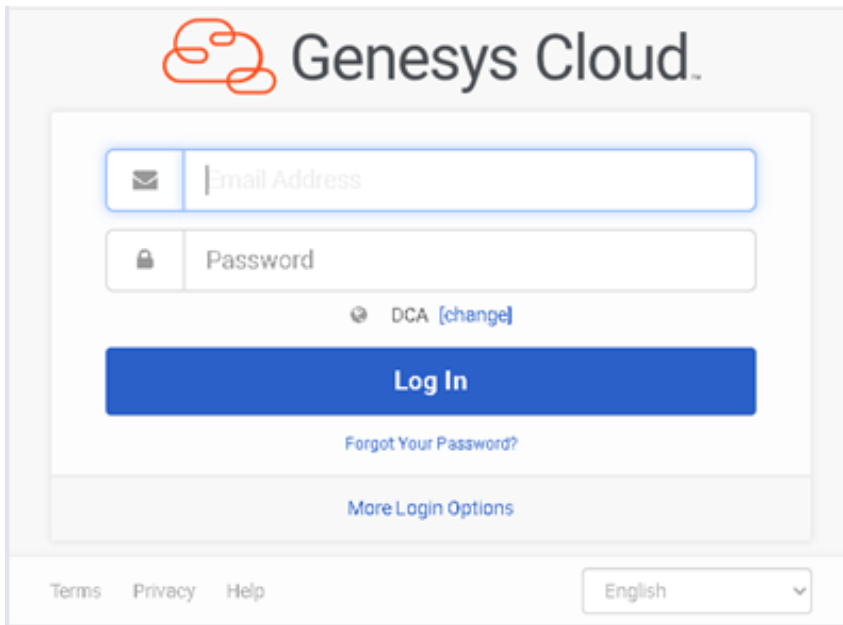
Start Genesys Cloud with PureConnect Credentials

This topic describes how to log on to Genesys Cloud without using a PureConnect client or Interaction Administrator.
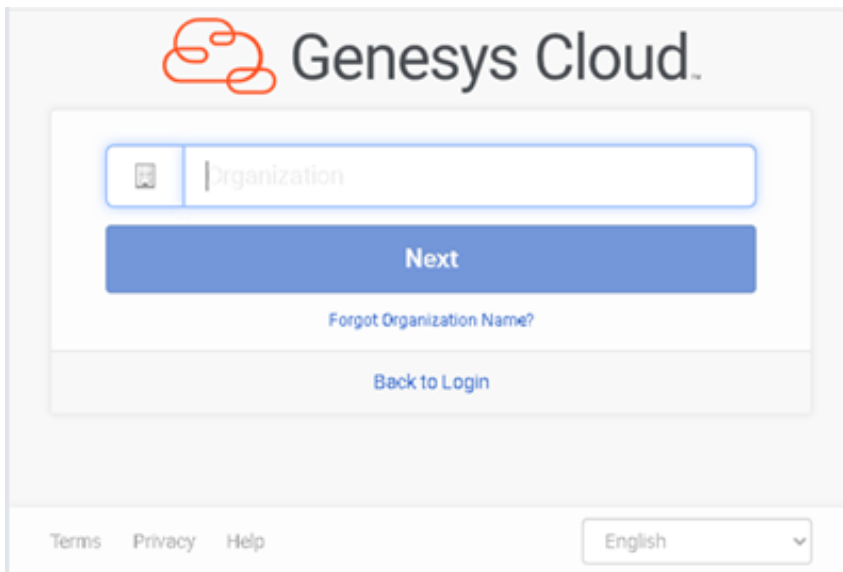
Requirements: You must first Enable PureConnect as a Genesys Cloud SSO provider. The certificate used in this SSO provider configuration must be part of the trust chain in the user's browser. Typically, the administrator uses a certificate that is fully trusted across all their agents' browsers or workstations.

1. Point your browser to the Genesys Cloud log in page.

   Note: The specific address corresponds to your region.

2. Select **More Login Options**.
3. Enter your **Organization Name**. Click **Next**.

4. Click the icon under **Log in with another account**.

   Note: This is the icon specified in the Genesys Cloud SSO provider configuration. This icon reminds users they are choosing to use PureConnect credentials.

5. In the PureConnect log on dialog box, enter your **PureConnect User ID** and **Password**.

Result: You log on to Genesys Cloud. Once logged on, an individual user's Genesys Cloud permissions determine which features are available.

FAQ

How do I check Genesys Cloud Integration status and activity?

Note: Genesys Cloud Bridge replaces PureCloud Bridge. Bridge status available previously in **PureCloud Admin** > **Integrations** > **Bridge** no longer applies.

You can check the status of the integration in **Genesys Cloud Integration Health**. If you are sending event data to Genesys Cloud (see Configure Genesys Cloud for PureConnect), you can also monitor the status of the Genesys Cloud Conduit for PureConnect.

Tip: In addition to the display in **Genesys Cloud Integration Health**, you can also use Windows Event IDs to monitor the status of Genesys Cloud Bridge. See also the FAQ, How do I check synchronization status for selected records.

Interaction Administrator

1. In the Interaction Administrator **Genesys Cloud Configuration** dialog box, select the **Genesys Cloud Integration Health** tab.
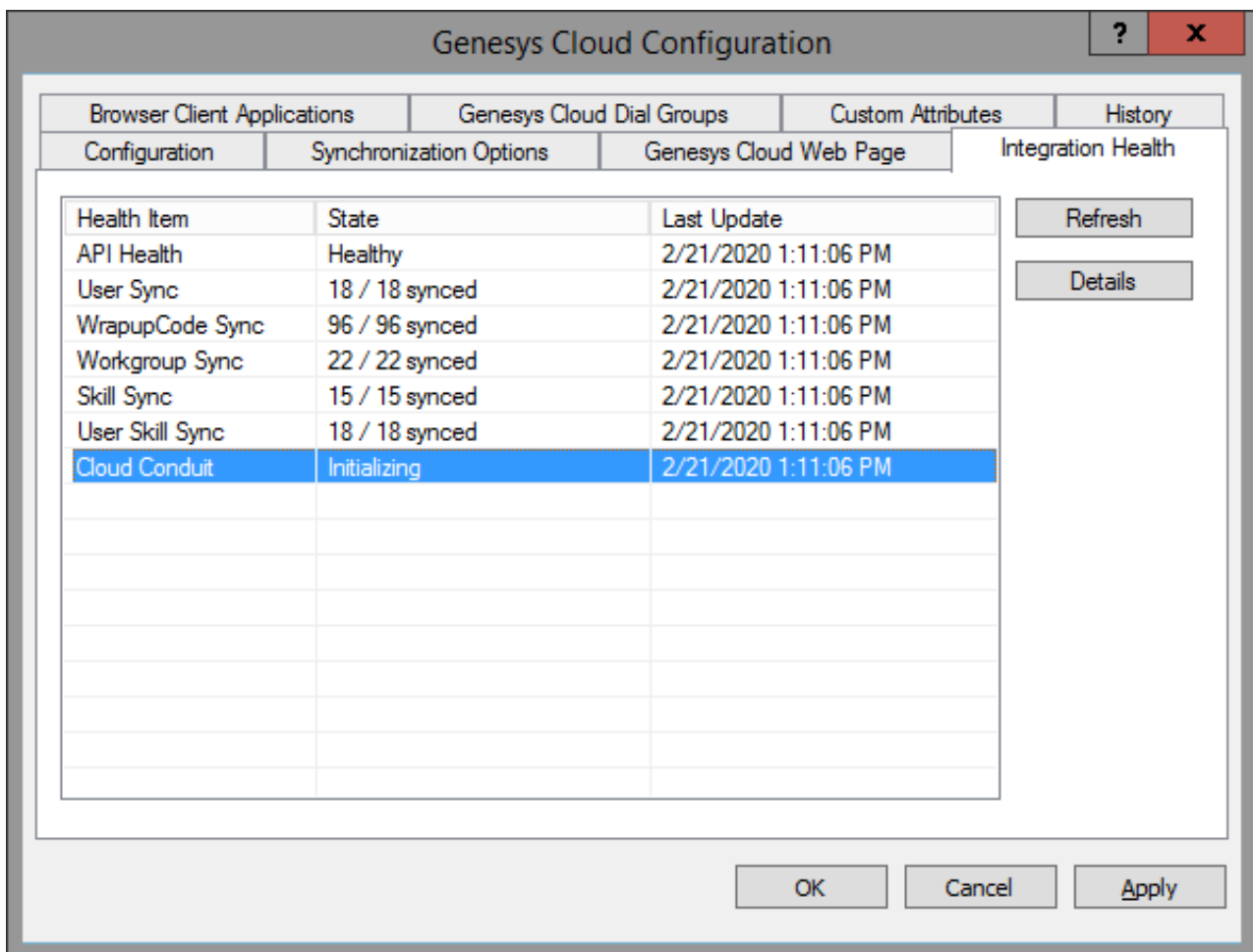
2. Select a **Health Item** and click **Details**.

Genesys Cloud Sync Details

Severity	Time	Message
Error	09/10/19, 11:14:09 AM	user13	Unexpected HTTP response status: <400: Bad Request;The version you supplied [3] d...
Error	09/10/19, 11:14:11 AM	user3	Unexpected HTTP response status: <400: Bad Request;The version you supplied [18] d...

user3 | Unexpected HTTP response status: <400: Bad Request;The version you supplied [18] does not match the current version [19] for entity dae35dd0-63b7-4a38-b82a-ed7aa1f5ff53 oid=5d4b318fa1278c18f1d63140 (person);   contextId:[dc4e2ffe-3ce1-450a-b65d-488c3957d0ab]>

3. In the Details view, select an item and view additional information.
4. Optionally, click **Copy** to place the information on the Clipboard for forwarding to your Customer Care representative.

Windows Event IDs

These two event IDs apply to **Genesys Cloud Bridge** status. Check for these event IDs in the Windows Log Viewer or an SNMP trap on the CIC Server.

MessageId=47000

> SymbolicName=MSG_PURECLOUD_CONNECTION_LOST
>
> Language=English
>
> Genesys Cloud connection lost.

MessageId=47001

> SymbolicName=MSG_PURECLOUD_CONNECTION_RESTORED
>
> Language=English
>
> Genesys Cloud connection restored.

How do I check synchronization status for selected records?

You can check the synchronization status of selected records after you enable the Genesys Cloud for PureConnect Integration. Each record shows the following:

Status

Synced status indicates this user's information successfully synced to your Genesys Cloud organization. **Error** indicates that synchronization failed. **Not synced** means synchronization has not been attempted.

Last Synchronized

This is the date and time of the last successful synchronization.

More synchronization information is available in the Integration Health tab of the Genesys Cloud Configuration dialog box. For more information, see How do I check Genesys Cloud Integration status and activity.

Users

The **Sync User Objects** Synchronization Option is selected by default when you enable the integration.

To view a user's synchronization status:
1. In Interaction Administrator, open **People > Users**.
2. Select a user.
3. In the User Configuration dialog box, select the **Genesys Cloud** tab.

Workgroups

If you enable the Genesys Cloud for PureConnect Integration and select the **Sync Advanced Platform Objects** option, this page displays the synchronization status for workgroup information.

Note: PureConnect workgroups sync to Genesys Cloud queues. PureConnect users are assigned to the appropriate Genesys Cloud queues.

1. In Interaction Administrator, open **People > Workgroups**.
2. Select a workgroup.
3. In the Workgroup Configuration dialog box, select the **Genesys Cloud** tab.

Wrap-up Codes

If you enable the Genesys Cloud for PureConnect Integration and select the **Sync Advanced Platform Objects** Synchronization Option, this page displays the selected wrap-up code's synchronization status.

Note: Only PureConnect wrap-up code **names** sync to Genesys Cloud. Genesys Cloud wrap-up codes do not have code labels, categories, or other PureConnect wrap-up code attributes.

1. In Interaction Administrator, open **People > Wrap-up > Wrap-up Codes**.
2. Select a wrap-up code.
3. In details view of the **View Wrap-up Code** page, select **Genesys Cloud.**

Skills

If you enable the Genesys Cloud for PureConnect Integration and select the **Sync Advanced Platform Objects** option, this page displays the synchronization status for a skill. You also decide whether this skill is classified as a language in Genesys Cloud.

For more information, see Configure Genesys Cloud Skill synchronization.

How do I reprovision the Genesys Cloud for PureConnect Integration?

If you want to reprovision the organization, PureConnect preserves your configuration information in case you want to re-enable the integration later.

1. In the Interaction Administrator Genesys Cloud Configuration dialog box, select the **Genesys Cloud Configuration** tab.
2. To disable the integration, clear the **Enable Genesys Cloud Integration** check box.

   > **Warning!** When you disable the integration, the synchronization process between CIC and Genesys Cloud stops immediately.

3. At the warning, "Do you want to continue and disable the integration," click **Yes**.

   > **Note**: The integration is essentially in a dormant state.

4. To reprovision your integration, select the **Enable Genesys Cloud Integration** check box and then click **OK**.

How do I change Genesys Cloud Admin credentials?

You can change the Genesys Cloud Admin credentials used in the Interaction Administrator Genesys Cloud Configuration tab, for example, when reprovisioning:

1. Ensure the matching Genesys Cloud account (CIC Integration Admin or whatever name you used):
   a. Exists
   b. Has the same credentials
   c. Has **Admin** role
2. In the Interaction Administrator **Genesys Cloud Configuration** tab, enter the required account credentials.
3. Click **OK**.

How do I roll back to CIC 2019 R3 Bridge Server?

This procedure enables you to downgrade from Genesys Cloud Conduit for PureConnect to Bridge Server.

> **Note**: The downgrade may result in Bridge Server status being offline or not found. If so, disable and re-enable the integration in the Interaction Administrator Genesys Cloud configuration dialog box. Also, be aware it may take up to two hours to sync new users by means of the PureCloud Bridge.

1. In Interaction Administrator, go to **Genesys Cloud** > **Configuration** > **Genesys Cloud Web Page**. Click **Launch Web Page**.
2. In Genesys Cloud, select **Admin** in the toolbar > **Bridge** > **Connectors** tab. Select and delete both offline connectors.
3. Close Interaction Administrators and any open Genesys applications.
4. Downgrade the IC Server to the previous release that supported the PureCloud Bridge.
5. Start Interaction Administrator. Go to PureCloud > **Configuration** > **PureCloud Configuration**. Verify that the configuration data persisted.
6. Select the **Bridge Status** tab.

   > **Note**: The On-host Bridge and connector Status may be "offline" or "Not found in PureCloud."

7. In the PureCloud Configuration container, select the **PureCloud Configuration** tab.
   a. Check the **Enable PureCloud Integration** check box, and confirm.
   b. Enter the **Administrator Email**, **Password**, and **Organization Name**. Click **OK**.
8. Open Windows Control Panel > **Add or Remove Programs**. Verify that you re-installed the Interactive Intelligence PureCloud Bridge Server.
9. Pause for a couple of minutes, open Services and look for the **Genesys Bridge Server** service. Verify that the Genesys Bridge Server is running.
10. In Interaction Administrator, open the **PureCloud** container > **Configuration** > **Bridge Status** tab. Verify that On-host Bridge is "Status: online", and both connectors have "Online Status: online."
11. To test the rollback:
    a. In Interaction Administrator, create a new user and add a business email and display name. Click **OK**.
    b. In Interaction Administrator, select **PureCloud** > **Configuration** > **PureCloud Web Page**. Clickthe **Launch Web Page** button.
    c. In PureCloud, verify that the **People** page opens in a browser and displays the new synced user and any previously synced users.
    d. In PureCloud, click **Admin** in the toolbar > **Bridge** > **Connectors** tab.
    e. Verify that the status of both connectors is "1 instance" and "1 online."

Appendix A: Common Conversation Event Data

All conversation events have five common fields:

- **organizationId**
- **conversationId**

  For external calls, the conversationId is the value of the Eic_InteractionUuid attribute for the interaction. For intercom calls, the conversationId is the value of the Eic_InteractionUuid attribute for the interaction marked as the outgoing interaction.
- **createdDate**

  This is the time at which the event was created. It is a 64-bit time_t value.
- **externalContactId**

  This is a UUID value corresponding to the call's Eic_RemoteEndpointImmutable attribute. The UUID value is registered with the Genesys Cloud Identity Stitching service. When non-call media types are supported, the appropriate value is selected from interaction attributes.
- **Channels**

  This field is a vector of media type/platform values. Only a single channel is currently reported.

Additional information is included for some conversation events:

- **ConversationAbandoned**

  Includes a queueId field. For PureConnect, the queueId is the UUID for the workgroup associated with the workgroup queue which contains the interaction in question. The workgroup UUID is found in DS.
- **ConversationAgentConnected**

  Includes a **queueId** field and also contains a **routingCriteria** vector. Each entry in the vector corresponds to a struct holding a skill name, the minimum proficiency for the skill, and the maximum proficiency for the skill. Values are not reported for DesireToUse. If categories were specified, they are reported as skills with the name "Category:<CategoryName>" and with min and max proficiencies of 100.
- **ConversationAgentWrappedup**

  Includes the **queueId**, an **agentId** (which is the User UUID associated with the agent), and a **wrapupCode** code. The event also includes a **wrapupNotes** field which is left empty.
- **ConversationEnqueued**

  Includes a **queueId** field and a **routingCriteria** field. These fields have already been described.
- **ConversationIvrDisposed**

  Includes a string **flowId** value which is the current path in the IVR. It also includes a **dispositionCode** which is the numeric code specified in the IP IVR_EnterLevel tool).
- **ConversationIvrMilestone**

  Includes a string **flowId** value plus a **milestone** which is the numeric code specified in the IP IVR_ExitLevel tool.

Change Log

The following table lists the changes to the *Genesys Cloud for PureConnect Administrator's Guide* since its initial release.

> **Note**: In the CIC 2019 R4 release, this document's title changed from *PureCloud for CIC Administrator's Guide* to *Genesys Cloud for PureConnect Administrator's Guide*.

Date	Changes
03-March-2016	Initial Release
27-May-2016	- Updated "Communication and dataflow diagram" description for clarity. - Updated "User information" to note that CIC 2016 R4 and later support status syncing.
07-July-2016	- The PureCloud Directory view is now available in Interaction Desktop and Interaction Connect. Both CIC clients have a **Collaborate** button that opens PureCloud Collaborate in a separate tab or browser and logs the user on to PureCloud automatically. - Starting with CIC 2016 R4, CIC client users can choose whether they want PureCloud or CIC to be the primary source for their status and presence. - A stricter password policy applies to the PureCloud for CIC administrator password. It now requires a minimum length of 8 characters with a default minimum of one number, one special character, one uppercase letter, and one lowercase letter. - The ICBridgeSetup Utility now enables you to uninstall an off-server bridge and remove it from the integration. - The CIC administrator can check on the health of the Integration at the new **PureCloud Configuration Bridge Status** tab in Interaction Administrator.
28-November-2016	Added information for the new CIC web-based phone and CIC Co-browse features.
16-February-2017	Fixed broken hyperlink to "Co-browse Configuration and Setup Overview" help topic.
27-March-2017	Fixed broken hyperlink to CIC web-based phone requirements topic.
08-June-2017	Added note that you can run only one instance of the Bridge Setup Utility at a time to the Install an off-server bridge and Uninstall a remote bridge and remove from integration sections.
04-August-2017	Added sections for new configuration tabs: "Configure PureCloud Browser Client Applications" and "Configure PureCloud Dial Groups".
07-September-2017	- Applied Genesys terminology, look, and feel. - Updated the cover page, copyright, and trademarks.
17-November-2017	In CIC requirements section, added: **Note:** The currently available PureCloud for CIC features are supported for both on-premises and PureConnect Cloud. The Co-browse and CIC web-based phone features require a PureCloud Edge server on the customer's premise.
20-November-2017	In "Bridge Setup Utility" section, added to Note: **Note:** In a Switchover pair, when you move from a local bridge to a remote bridge or remove the integration, the local bridge is automatically removed.
16-March-2018	Corrected Note in CIC requirements section. **Note:** The currently available PureCloud for CIC features are supported for both on-premises and PureConnect Cloud. The CIC web-based phone feature requires a PureCloud Edge server on the customer's premises.
21-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..."

23-July-2019	Removed references to the PureCloud Directory view in Interaction Desktop and Interaction Connect. This view is no longer supported. Also made multiple screenshot and text updates for Genesys rebranding and PureCloud administration updates. See WEB-3928 Remove PureCloud Directory View.
13-September-2019	Largely rewrote this Administrator's Guide because of the switch to Cloud Bridge. This included new dialog tabs in Interaction Administrator and the renaming of the integration to Genesys Cloud for PureConnect. This document's title changed from *PureCloud for CIC Administrator's Guide* to *Genesys Cloud for PureConnect Administrator's Guide*.
27-September-2019	Updated diagram in Communication and data flow diagram. Changed references to PureCloud Collaborate to Single-sign on PureCloud.
01-October-2019	Made developer edits.
07-February-2020	Added content for Cloud Conduit feature. There is a new configuration option and a new appendix for Common Conversation Event Data. As part of an ongoing rebranding effort, changed PureCloud to Genesys Cloud where appropriate in this document.
12-February-2020	Updated Configure Genesys Cloud for PureConnect for renamed check box, now labeled Send AI Conversation Events. Updated Communication and data flow diagram.
18-February-2020	Added information for enabling PureConnect to act as a Genesys Cloud SSO provider. Provided information about configuring the PureConnect environment and included a link to the necessary PureCloud configuration help. Also included an example of using PureConnect credentials to log on to Genesys Cloud. Reorganized this Administrator's Guide as needed.
16-April-2020	Added information for the syncing of Advanced Platform Objects: Workgroups, Skills, and Wrap-up Codes.
27-Apriil-2020	Updated diagram in Communication and data flow diagram topic.
04-May-2020	Added Altocloud and WhatsApp section to PureConnect client application features topic.
06-May-2020	Added Altocloud and WhatsApp sections to Advanced feature requirements, configuration and setup topic.
08-May-2020	Changed link in Advanced feature requirements, configuration, and setup to point to correct Interaction Connect topic.
29-May-2020	Added links to requirements and use information to the PureConnect client application features topic.
04-August-2020	Changed appropriate instances of PureCloud to Genesys Cloud to match the new name.