PureConnect®

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See Change Log for summary of changes.

Altocloud Integration

Technical Reference

Abstract

Genesys Altocloud is a customer journey analytics platform that analyzes all kinds of customer journey behavior and data. Your organization can use it to observe and analyze visitors on your digital properties, such as websites. Genesys Altocloud can predict what it will take for visitors to achieve a desirable business outcome, and then it acts to offer the most appropriate and effective channel to assist them in completing their journey.

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

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Overview

Genesys Predictive Engagement is a customer journey analytics platform that analyzes all kinds of customer journey behavior and data. Your organization can use it to observe and analyze visitors on your digital properties, such as websites. Genesys Predictive Engagement can predict what it will take for visitors to achieve a desirable business outcome, and then it acts to offer the most appropriate and effective channel to assist them in completing their journey.

Predictive Engagement and PureConnect

Predictive Engagement integrates with Interaction Connect, the PureConnect browser-based application where agents handle customer interactions, such as calls, email, and chats. 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 Predictive Engagement offers a chat, the chat interaction is created and routed just like any other interaction.

Once a chat is connected to an agent in Interaction Connect, the agent can view a map that outlines the visitor's journey on the website.
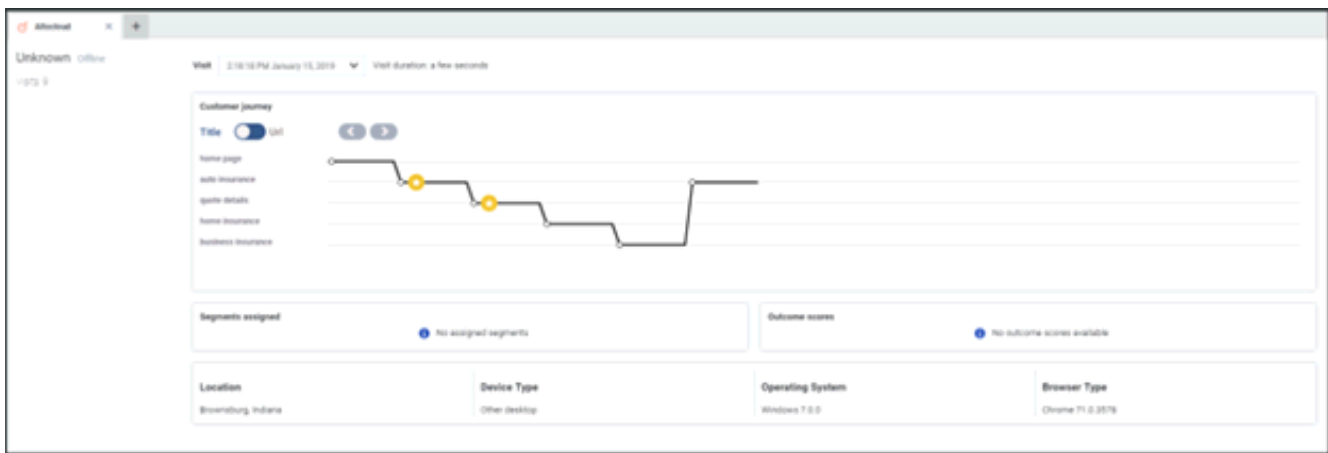
For a description of the elements included in the journey map, see Customer Journey in the Predictive Engagement documentation.

Future versions of the integration will support additional interaction types.

Prerequisites

This document assumes that:

- CIC 2019 R2 patch 3 or higher is installed.
- Genesys Widgets version 9.0.015.11
  Genesys released support for Genesys Predictive Engagement content offers in PureEngage and Genesys Cloud on January 11, 2019. A content offer is a type of Predictive Engagement action that triggers on a website when a user's behavior or segment matches to the criteria defined in an action map. For more information about content offers, see https://all.docs.genesys.com/ATC/Current/AdminGuide/About_content_offers.

- Your website is Predictive Engagement-enabled.
- The CIC server is configured with the following licenses. To load the license file that contains both licenses, see Load the Genesys Predictive Engagement License File.
  - I3_FEATURE_ALTOCLOUD
  - I3_ACCESS_ALTOCLOUD_USER
- A Genesys Cloud organization that is provisioned and linked to the CIC server, with bridges and connectors installed and configured. Your Genesys Cloud organization is created for you and you will 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.
  - A default AI Agent role that provides access to AI services, such as Predictive Engagement.
    You'll need to have the following information about your organization. See Access Your Organization in Genesys Cloud.
  - Administrator email address
  - Administrator password
  - Organization long name – the name used to create the Genesys Cloud organization
  - Organization short name – the name generated from the organization long name in compliance with DNS restrictions (a-z, 0-9, A-Z)
    Note:
    If you are unsure of the organization short name, log in to Genesys Cloud at https://login.mypurecloud.com (or other region-based login site) and navigate to **Admin>Account Settings>Organization Settings**. Both the organization long name and short name are listed here.
  - Region

    For more information about provisioning your Genesys Cloud organization, see the *Genesys Cloud for PureConnect Administrator's Guide* in the PureConnect documentation library.

Documentation Resources

This document ties together the various pieces of the integration, from configuration to agents handling Predictive Engagement chats. You may need to access other documentation resources for more information about specific topics. For example, adding views in Interaction Connect, elements of the customer journey map, or licensing in Interaction Administrator.

The following is a list of some helpful documentation resources that you may want to consult.

See this:	For:
Genesys Predictive Engagement documentation site	General information about Predictive Engagement.
Genesys Predictive Engagement Administrator's Guide	Information about configuration tasks in the Predictive Engagement Admin UI. Keep in mind that it is not PureConnect-specific and not all features described are included in the PureConnect integration with Predictive Engagement.
Genesys Predictive Engagement Agent's Guide	A description of the elements in the customer journey map. Note that not all features described in the Agent's Guide apply to the PureConnect integration.
Interaction Administrator Help	More information about configuring PureConnect workgroups, assigning licenses, and configuring server parameters.
Interaction Connect Help	Adding the Predictive Engagement (formerly Altocloud) view in Interaction Connect and learning about widgets.
Genesys Cloud for PureConnect Administrator's Guide	Configuring the PureConnect integration with Genesys Cloud.

Configure the Integration

Configuration Overview

There are several items to configure for the integration, in several different locations. Some of the configuration tasks are documented outside of this technical reference. Links are provided to the relevant content.
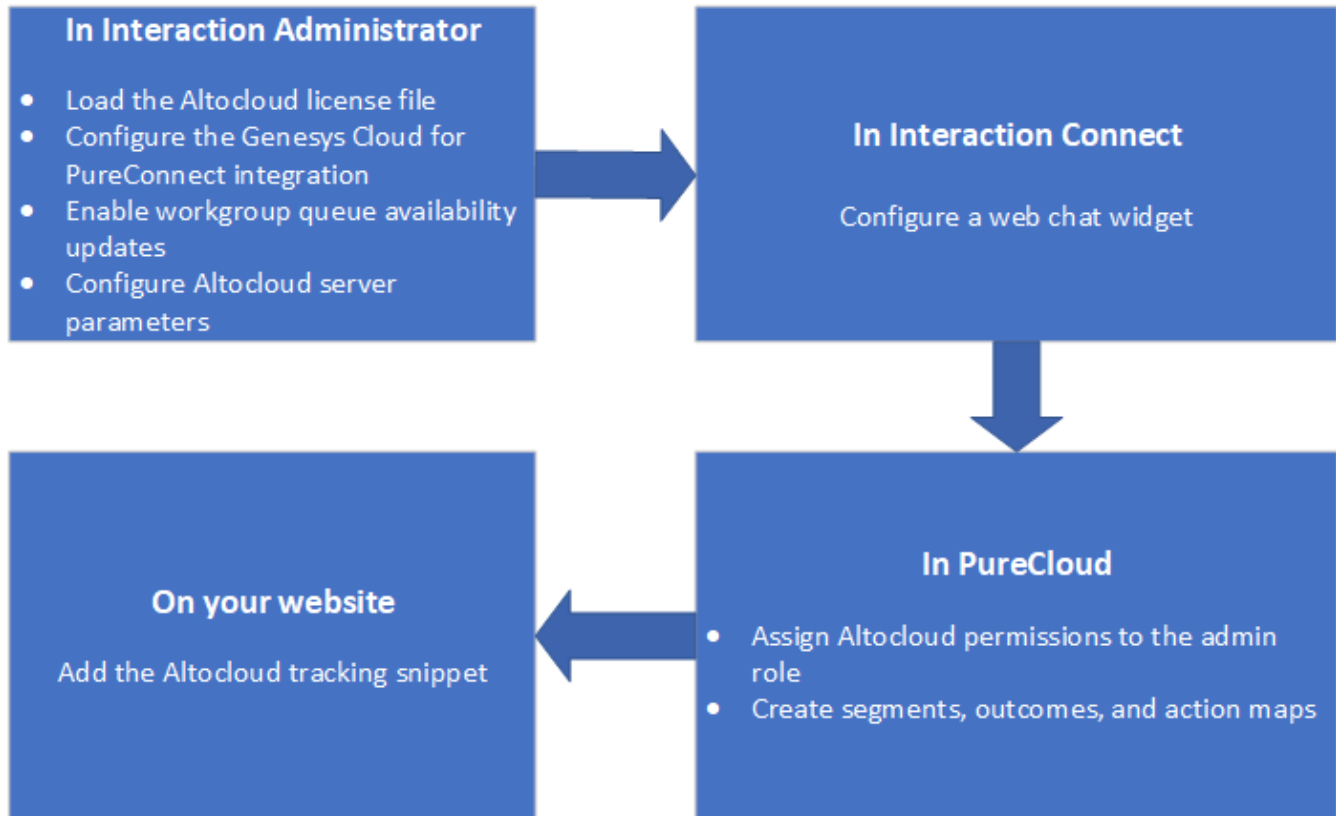
In Interaction Administrator:
- Enable the Predictive Engagement server and user licenses. See Load the Predictive Engagement License File.
- Configure the Genesys Cloud for PureConnect integration. See the *Genesys Cloud for PureConnect Administrator's Guide*.
- Enable Workgroup Queue Availability Updates.
- Configure Predictive Engagement Server Parameters in Interaction Administrator.

In Interaction Connect:
- Configure a web chat widget. See PureConnect Widgets.

In Genesys Cloud:
- Assign Predictive Engagement journey permissions to the admin role.
- Create Predictive Engagement Segments, Business Outcomes, and Action Maps.

On your website:
- Add the Predictive Engagement Tracking Snippet to your Website.

Your Genesys Cloud Organization

PureConnect uses a predictive engagement service hosted in the Genesys Cloud platform. The service, Genesys Predictive Engagement, requires a Genesys Cloud organization. Genesys provides you with a Genesys Cloud organization that is configured with default roles and permissions. Contact your Genesys account manager for more information about obtaining your Genesys Cloud organization.

To configure your organization in Interaction Administrator, you'll need some information about it. To find your organization's information:

1. Log in to your Genesys Cloud region using the credentials provided in your Welcome email. For more information about regions, see: https://developer.mypurecloud.com/api/rest/index.html

2. In the Genesys Cloud Admin menu, under **Account Settings > Organization Settings**, find your company name and short name, and then click **Advanced** to find your organization ID. You will need this information when you configure your organization in Interaction Administrator. See Configure Your Genesys Cloud Organization.
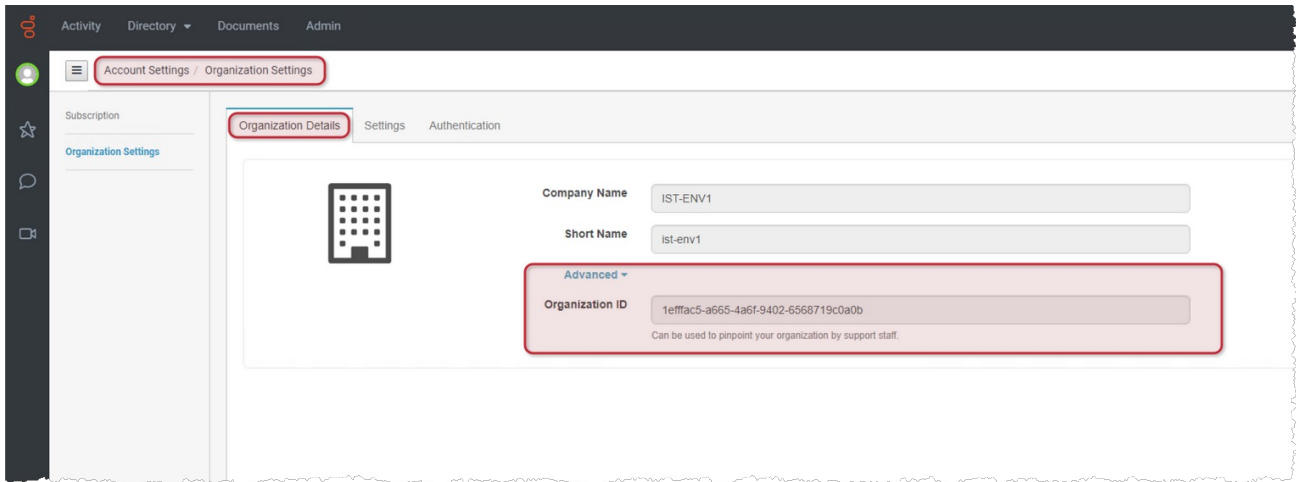
Default Roles

Your organization includes a Genesys Cloud **Admin** role, which includes the default admin permissions and the journey permissions needed for Predictive Engagement. To modify the permissions, see Assign Predictive Engagement Permissions in Genesys Cloud.

The organization also includes a default **AI Agent** role, which provides these permissions and allows agents to access Altocloud.

Ai Agent	Journey > Actionmap > View
Ai Agent	Journey > Actiontarget > View
Ai Agent	Journey > Customer > All
Ai Agent	Journey > Event > Add, Edit, View
Ai Agent	Journey > Outcome > View
Ai Agent	Journey > Report > View
Ai Agent	Journey > Segment > View
Ai Agent	Journey > Session > View
Ai Agent	Journey > Settings > View
Ai Agent	Journey > Visit > All

In addition to the AI Agent role/permissions, agents must have the Genesys Cloud routing permissions.

Routing permissions for agents

This table lists the PureCloud routing permissions available for agents to work with queues and Altocloud.

This permission	Allows these actions
Routing > Agent > On Queue	Go on queue.
Routing > Queue > Join	Join a queue.
Routing > Queue > Search	Search for brief queue information.
Routing > Queue > View	View queues.

Interaction Administrator Configuration

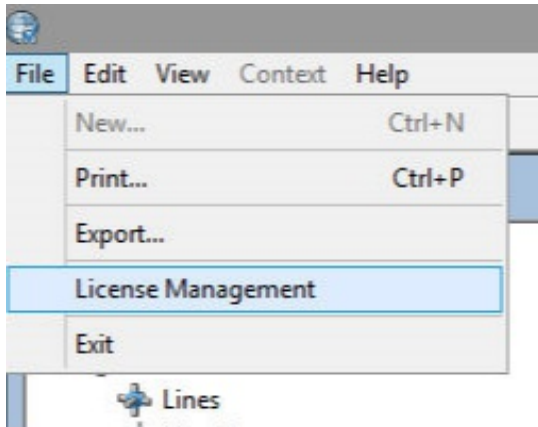# Load the Genesys Predictive Engagement License File

The PureConnect integration with Predictive Engagement requires you to load the license file that Genesys provides you. The file contains these licenses:

The I3_FEATURE_ALTOCLOUD server license turns on the integration for the CIC server.
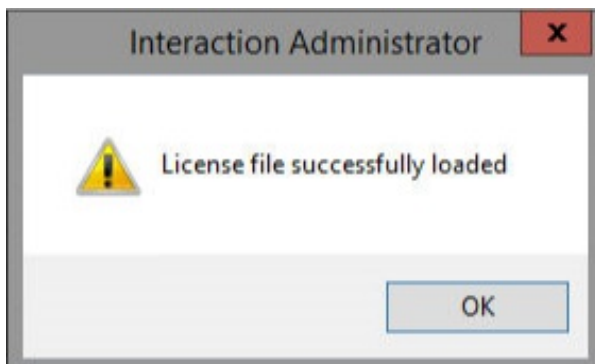
The I3_ACCESS_ALTOCLOUD_USER user license enables an agent to receive interactions initiated by Predictive Engagement.

To load the license file:

1. In Interaction Administrator, open **File > License Management**.

2. Click **Load License**.
3. Browse for the license file, and then click **Open** to load the license.

You must assign the I3_ACCESS_ALTOCLOUD_USER license to each Predictive Engagement user in the Interaction Administrator user configuration on the Licensing tab.

For general information about licensing, see Licensing Configuration in the Interaction Administrator help or the *PureConnect Licensing Technical Reference*.

Configure Your Genesys Cloud Organization

In Interaction Administrator, you must provision your Genesys Cloud organization to integrate with PureConnect. Provisioning involves:

- Enabling the integration.
- Entering your organization's information and region.
- Configuring the Genesys Cloud for PureConnect integration.
- Testing the connection.

To complete these steps, refer to the *Genesys Cloud for PureConnect Administrator's Guide*.

Once you provision your Genesys Cloud organization, Interaction Administrator syncs all PureConnect users to Genesys Cloud. Note that synced users do not have default roles assigned in Genesys Cloud. You need to assign them.

On the **Genesys Cloud Browser Client Applications** tab, type the URL for the browser application. That is, https://apps.mypurecloud.com/journey. And then click **Add**. This authorizes PureConnect to use the Genesys Cloud API. Without it, the Predictive Engagement journey view cannot be displayed in Interaction Connect.

Click **OK**.

Enable Workgroup Queue Availability Updates

Before offering a chat to a website visitor, Genesys Predictive Engagement first determines if there are agents available to handle the chat. To determine if there are available agents, PureConnect sends estimated wait time (EWT) updates to Predictive Engagement for the available queues. You must enable a workgroup to include it in the updates.

In the workgroup configuration in Interaction Administrator, select **Enable Altocloud queue availability updates** on the **Options** tab. For more information about workgroup configuration options, see Workgroup Options in the Interaction Administrator help.

Note: PureConnect only sends availability updates for a workgroup when at least one member of the workgroup is licensed for Predictive Engagement and is logged in. If no Predictive Engagement-licensed users are logged in, PureConnect does not send updates for that workgroup.

For information about server parameters that affect the behavior of the updates, see Configure Predictive Engagement Server Parameters in Interaction Administrator.

Configure Optional Genesys Predictive Engagement Server Parameters in Interaction Administrator

Optional server parameters are available to configure in Interaction Administrator to control the availability updates.

Availability Update Parameters

You can use these server parameters to disable updates or change the rate at which updates are sent:

- **AltocloudPacingRateOverrideMilliseconds** – Without this server parameter in use, PureConnect sends availability updates every five seconds. This parameter allows you to change the rate at which updates are sent. The value assigned to this parameter must be in milliseconds. For example, use 5000 for 5 seconds. 3000 (3 seconds) is the minimum (slowest) value you can assign. There is not a maximum value.
- **AltocloudPacingDisabledUpdates** – If set to yes or 1, the availability updates are turned off.

For more information about availability updates, see Enable Workgroup Queue Availability Updates.

Genesys Cloud Configuration

Access Your Organization in Genesys Cloud

To gather the information you'll need about your organization in Genesys Cloud, do the following:

1. In Genesys Cloud, click **Admin.**
2. Under **Account Settings**, click **Organization Settings.**
3. On the **Organization Details** tab, click **Advanced** to display the organization ID..
4. If you are configuring your organization for the first time, then copy the **Company Name**, **Short Name** and **Organization ID**. You will need these values to complete your account configuration.
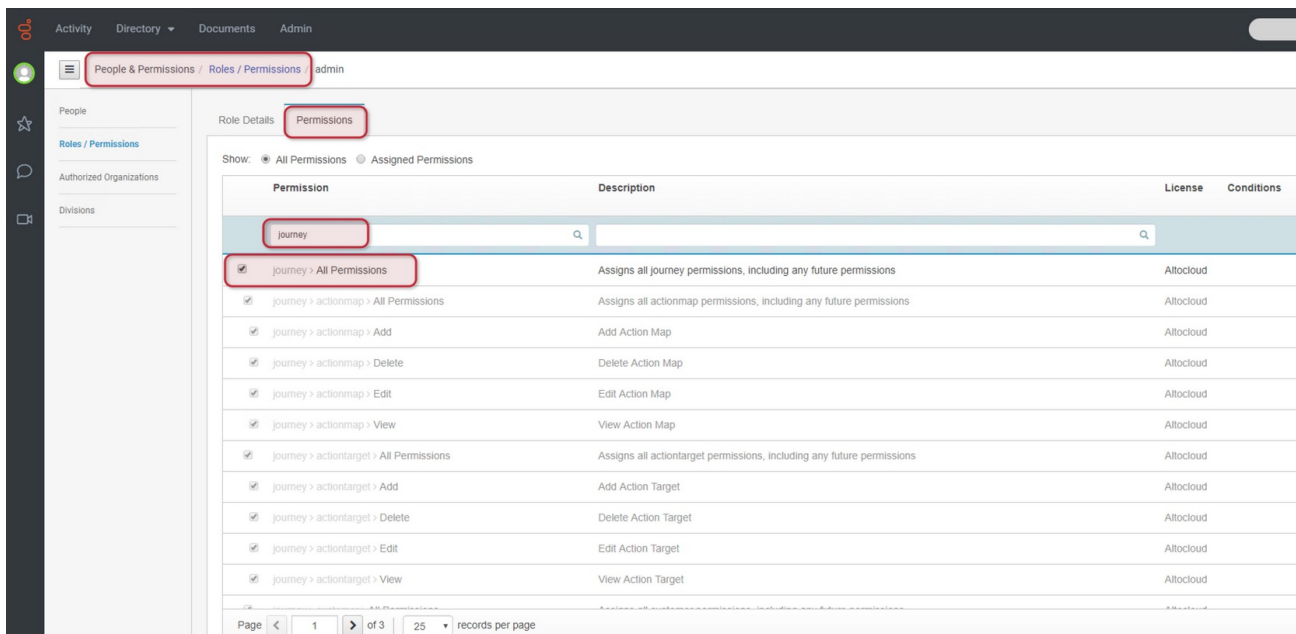
Assign Genesys Predictive Engagement Permissions in Genesys Cloud

The Journey permissions in Genesys Cloud are required for the following:

- To send availability updates to Predictive Engagement
- For PureConnect users to load and use the Predictive Engagement (formerly Altocloud) journey view in Interaction Connect

To assign the permissions to the admin role::

1. In Genesys Cloud, click **Admin.**
2. Under **People and Permissions,** click **Roles/Permissions**.
3. In the list of roles, click the admin role.
4. Click the **Permissions** tab.
5. In the search field, type journey.
6. Select **journey > All Permissions**.
7. On the Permissions tab, assign all journey permissions to the admin.

Create Genesys Predictive Engagement Segments, Business Outcomes, and Action Maps

In the Predictive Engagement Admin UI:

- Create *segments* (optional), which let you identify visitors with shared characteristics or behaviors.
  For more information about segments, see Segments in the Genesys Predictive Engagement documentation.
- Create *business outcomes* (optional). Predictive Engagement uses your outcomes to analyze which website visitors achieve your business goals and to score progress of future visitors.
  For more information about business outcomes, see Outcomes in the Predictive Engagement documentation.
- Create *action maps* (required). Action maps represent the steps that Predictive Engagement will take when a customer satisfies the criteria you specify. The action map configuration identifies the customer activity that triggers the action and the action that results.
  For more information about action maps, see Action Maps in the Predictive Engagement documentation.

For more information about the Predictive Engagement Admin UI, see Get Started in the Predictive Engagement documentation.

Add the Genesys Predictive Engagement Tracking Snippet to your Website

A Predictive Engagement tracking snippet enables your organization to track website visitors. You need to deploy the snippet on your website.
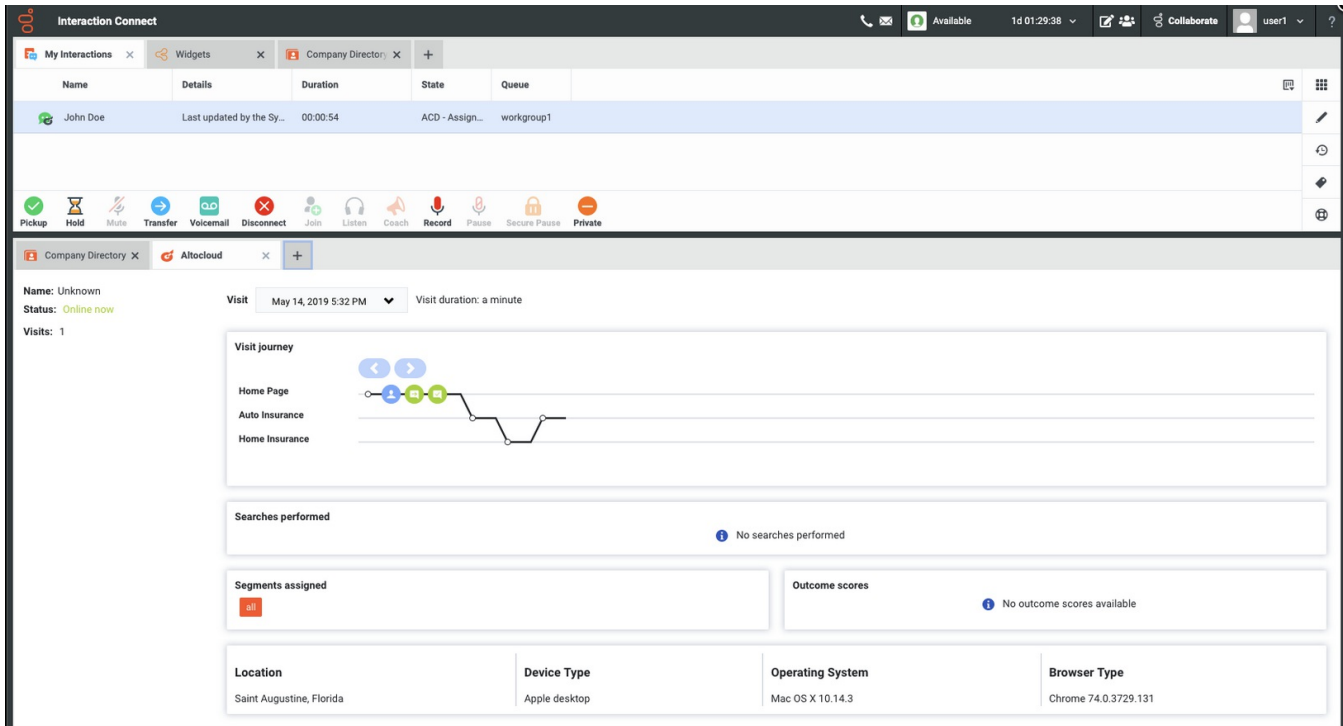
See Tracking Snippet in the Predictive Engagement documentation.

Predictive Engagement in Interaction Connect

Predictive Engagement (formerly Altocloud) View in Interaction Connect

Interaction Connect is the PureConnect browser-based application where agents handle customer interactions, such as calls, emails, and chats. Chats initiated by Predictive Engagement appear in the Interaction Connect **Current Interaction** view, just like PureConnect chats.

The customer journey map in Interaction Connect appears in a view that agents can add.

The customer journey map might, for example, provide information about the sequence of pages a visitor saw and the actions they took.

To add the view for Predictive Engagement in Interaction Connect, see Views and Dialog Boxes in the Interaction Connect help.

For a description of the elements that appear in the customer journey map, see Customer Journey in the Predictive Engagement documentation.

PureConnect Widgets

Widgets in Interaction Connect are elements that you can add to a website to support activities like chatting with an agent. The widgets are Javascript-based, cloud-hosted, and cloud-configured extensions that implement the Genesys Widgets API.

Interaction Connect supports the configuration of Genesys widgets. These widgets are easy to configure and deploy by means of code snippets you include in your website.

A widget must be embedded on your organization's website, along with one created in Add the Predictive Routing Tracking Snippet to your Website. When configured, the widget knows which CIC server and ICWS endpoint to use to initiate a chat.

After configuring the widget, click **Copy Script** and then deploy the resulting widget script on your website.

For more information about widgets in Interaction Connect, see Widgets in the Interaction Connect help.

Change Log

The following changes have been made to the *PureConnect Integration with Genesys Predictive Engagement Technical Reference*.

Change Log Date	Changed...
13-February-2019	Initial release
14-May-2019	Minor updates for 2019 R2
12-June-2019	Updated configuration procedures to reflect move to PureCloud in 2019 R2 Patch 3.
7-November-2019	Updated for 2019 R4 and new Genesys Cloud bridge integration.
19-December-2019	Added Genesys Widgets version for Altocloud Content Offers to Prerequisites.
21-January-2020	Removed notice about testing of Widgets 9.0.015.11 from Prerequisites topic.
17-September-2020	Renamed Altocloud to Genesys Predictive Engagement. Updated references to PureCloud.
06-October-2020	Updated name of Altocloud view in Interaction Connect to Predictive Engagement.