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eServices Manager Plug-in for GAX

Install eServices Manager

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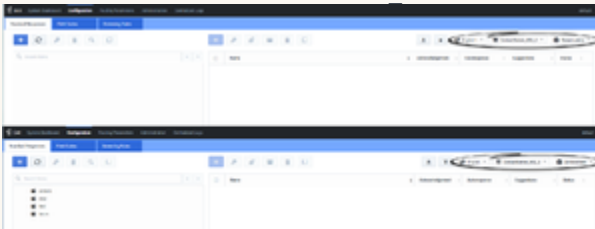
Install eServices Manager

Prerequisites

- Genesys Administrator Extension (GAX):
 - eServices Manager 9.0.000.09 must use a release between GAX 8.5.290.09 to GAX 9.0.001.xx. This version of eServices Manager is not compatible with GAX 9.0.100.xx or later.
 - eServices Manager releases between 9.0.001.08 and 9.0.003.03 must use a release between GAX 8.5.290.09 to GAX 9.0.101.xx.
 - eServices Manager 9.0.003.05 and higher must use GAX 8.5.290.09 or later.
- UCS 8.5.200.19 or later
- UCS Proxy 8.5.100.04 or later
- Classification Server 8.5.200.05 or later
- If a previous version of eServices Manager Plug-in for GAX was installed on the current host, **uninstall that version**.

Important

One UCS instance can support multiple tenants in eServices Manager, and each tenant's data for standard responses and screening rules are stored separately from other tenants. The graphic below shows two tenants (*Environment* and *Tenant_extra*) using one UCS instance (*ContactServer_852_2*). The *Environment* tenant has data that is not accessible in the *Tenant_extra* tenant.



The following exceptions apply:

- Field codes and custom variables are the same for all languages and tenants in the same environment.
- Names of root categories must be unique for all languages in a single tenant.

Creating a zip file

1. Create a temporary folder on your desktop.
2. Copy the IP folder from the original location (typically, the product CD) into the temporary folder.
3. Copy the templates folder from the original location into the temporary folder.
4. Zip the contents of the temporary folder. Ensure the folders **ip** and **templates** are in the root directory of the zipped file.

Alternatively, contact Genesys Customer Care to obtain the required Zip file containing the installation package and associated templates.

Installing the plugin

Local Control Agent 8.5.100.31 or higher

1. Upload the eServices Manager installation package (IP) to GAX. Refer to the [GAX documentation](#) for more information.
2. Extract the IP to any folder.
3. Navigate to the **ip** folder in the extracted folder.
4. Do one of the following:
 - On Windows, run **setup.exe**.
 - On Linux, run **install.sh**.
5. Restart GAX.

Local Control Agent 8.5.100.29 or lower

1. Add the following option to the **Application Options** tab of the Genesys Administrator Extension (GAX) Application object:
 - Section name: **[asd]**
 - Option name: **plugin_ip_list**
 - Option value: eSMngrPlgnAdm64 (for the Windows host) or eSMngrPlgnAdm (for the Linux host)

Tip

This option is also used by [Content Analyzer Plug-in for GAX](#) and [Privacy Manager Plug-in for GAX](#). If you are running both Privacy Manager and eServices Manager with Content Analyzer, the value can be a comma-separated list; for example, eSMngrPlgnAdm, PrivacyMng, CntAnlzPlgnAdm.

2. Restart GAX.
3. **Upload the eServices Manager installation package (IP)**. If you previously uploaded the IP, you must do so again now.
4. Carry out the **plug-in installation process**.
5. Restart GAX.

Configuring the plugin

Local Control Agent 8.5.100.31 or higher

1. Create an Application for eServices Manager with the type Application Cluster.
2. Add tenants to the eServices Manager Application.
3. Specify the Host and Port. The Application Cluster application object and the GAX application must be configured with the same host in order to enable mutual TLS connections.
4. Connect the eServices Manager Application to UCS, UCS Proxy, and Classification Server.
5. Configure these connections: TLS, ADDP, and so on.
6. Navigate to the GAX Application Options.
7. Create a section with the name **[gax-km]**.
8. Create the following options in the **[gax-km]** section:
 - **app-name** = eServices Manager Application name
 - **file-storage-path** = Full path to the folder in which eServices Manager creates its temporary file. You must ensure that eServices Manager has permission to write into that directory.
 - **connection-timeout** = 3
9. If you need multi-language support, set the UTF-8 JVM parameter for all Java components (UCS, GAX Server, Browser, Classification Server) in the corresponding .ini file (or the .bat file if you start the component from the command line):
ini file: [JavaArgs] -Dfile.encoding=UTF-8 ...
bat file: set JAVA_OPTS=%JAVA_OPTS% -Dfile.encoding=UTF-8 ...
10. Restart GAX.

Tip

On multi-language support: In the GAX **User Preference** window (under the Preferences menu), **Use system settings** refers to using the settings in the **System Preferences** window. It does not refer to the Region and Language setting of the host machine.

If **Use system settings** is selected in the **Language** field of GAX's **Locale User**

Preferences, it refers to the language that is selected in the **Language** field of **System Preferences**. Note that if you want to have any language other than English available in these fields, you must install the relevant language pack plug-in.

Local Control Agent 8.5.100.29 or lower

1. Create an Application for eServices Manager with the type Application Cluster.
2. Add tenants to the eServices Manager Application.
3. Specify the Host and Port. The Application Cluster application object and the GAX application must be configured with the same host in order to enable mutual TLS connections.
4. Connect the eServices Manager Application to UCS, UCS Proxy, and Classification Server.
5. Configure these connections: TLS, ADDP, and so on.
6. Navigate to the GAX Application object's **[gax-km]** section and configure the following options:
 - **app-name** = The eServices Manager Application name.
 - **file-storage-path** = The full path to the folder in which eServices Manager creates its temporary file. You must ensure that eServices Manager has permission to write into that directory.
7. If you need multi-language support, set the UTF-8 JVM parameter for all Java components (UCS, GAX Server, Browser, Classification Server) in the corresponding .ini file (or the .bat file if you start the component from the command line):
ini file: [JavaArgs] -Dfile.encoding=UTF-8 ...
bat file: set JAVA_OPTS=%JAVA_OPTS% -Dfile.encoding=UTF-8 ...
8. Restart GAX.

Tip

On multi-language support: In the GAX **User Preference** window (under the Preferences menu), **Use system settings** refers to using the settings in the **System Preferences** window. It does not refer to the Region and Language setting of the host machine.

If **Use system settings** is selected in the **Language** field of GAX's **Locale User Preferences**, it refers to the language that is selected in the **Language** field of **System Preferences**. Note that if you want to have any language other than English available in these fields, you must install the relevant language pack plug-in.

Configuring structured messages

The following steps describe how to configure **structured messages** using Configuration Manager. If preferred, you can use Genesys Administrator or Genesys Administrator Extension.

First, ensure you have selected the correct tenant that you want to use for structured messages.

Create the following business attribute:

- **Name:** MediaOrigin
- **Display Name:** Media Origin
- **Type:** Custom

Refer to the following sections for channel-specific configuration:

Apple Business Chat

1. In the **MediaOrigin** business attribute, create the following business attribute values:
 - **Name**—applebc-session
 - **Display Name**—Enter a display name.
 2. For **applebc-session**:
 1. In the **Annex** tab, create a section named **[rich-media-types]**.
 2. Create the following options:
 - **Apple Pay**
 - **Custom Extension**
 - **Time Picker**
 - **List Picker**
 - **Rich Link**
- Do not provide a value for any option.

WhatsApp

1. In the **MediaOrigin** business attribute, create the following business attribute values:
 - **Name**—genesys-chat
 - **Display Name**—Enter a display name.
2. For **genesys-chat**:
 1. In the **Annex** tab, create a section named **[rich-media-types]**.
 2. Create the following options and set their values:
 - **Notification**=Notification
 - **Reply Button**=Reply Button
 - **List Message**=List Message

Configuring language and country for WhatsApp structured messages

This feature is only available starting with the version 9.0.001.08 and later.

1. For the **Language** business attribute values:

1. In the **Options** tab, create a section named **[code]**.
2. Create the following options and set their values:
 - **language** = A valid ISO 639 code containing two symbols in the lowercase format. For example, es for Spanish.
 - **country** = A valid ISO 3166 code containing two symbols in the uppercase format. For example, ES for Spain.

Important

If the **language** and **country** options and values are not available or incorrect, the default values of en for language and US for country are used. The values for the **language** and **country** options must be the same as you have in the approval message for WhatsApp. For more information on the supported languages, refer to [Supported Languages](#).

Role-Based Access

To grant a user access to the GAX menu and eServices Manager Plug-in for GAX, assign the following privileges to the users in GAX:

- **COM/Access Configmanager**
- **eservices-manager/Genesys eServices Manager Plug-in for GAX Access**

You can also assign the following **eservices-manager** role privileges to users:

Type	Privilege name	Prerequisite
Standard response	View Standard Response	
	Create Standard Response	View Standard Response
	Modify Standard Response	View Standard Response
	Delete Standard Response	View Standard Response
	Approve Standard Response	Modify Standard Response
Category	Create Category	
	Modify Categories	
	Delete Categories	
Screening rule	Create Screening Rule	
	Modify Screening Rule	
	Delete Screening Rule	
Field code	Create Field Code	
	Modify Field Code	

Type	Privilege name	Prerequisite
	Delete Field Code	
Import/Export	Import Knowledge Management Objects	• Create Standard Response • Modify Standard Response • Create Category • Modify Categories • Create Screening Rule • Modify Screening Rule • Create Field Code • Modify Field Code
	Export Knowledge Management Objects	View Standard Response

Important

- Custom variables share the same set of privileges with field codes. This means that:
 - **Create Field Code** is required to create a custom variable.
 - **Modify Field Code** is required to modify a custom variable.
 - **Delete Field Code** is required to delete a custom variable.
- Test messages share the same set of privileges with screening rules. This means that:
 - **Create Screening Rule** is required to create a new test message.
 - **Modify Screening Rule** is required to modify a test message.
 - **Delete Screening Rule** is required to delete a test message.

Uninstalling the plugin

On Linux

1. Stop GAX.
2. Go to **<GAX_HOME>/webapp/WEB-INF/lib** on the file system (where **<GAX_HOME>** is your home folder for the GAX application).
3. Delete the **gax-km-<\$version\$>.jar** file (where **<\$version\$>** is the version of the plugin).

4. Go to **<GAX_HOME>/plug-ins** on the file system.
5. Delete the **gax-km-<\$version\$>.jar** file.
6. Go to **<GAX_HOME>/webapp/plugins** on the file system.
7. Delete the **gax-km** folder.
8. Start GAX.

On Windows

1. Stop GAX.
2. Go to **Programs and Features**.
3. Find and run **Genesys eServices Manager Plug-in for GAX <\$version\$>** (where **<\$version\$>** is the version of the plugin).
4. Select the **Remove** check box.
5. Click **Next**.
6. Click **Yes** in **Confirm Windows**.
7. Click **Finish**.
8. Go to **<GAX_HOME>/webapp/plugins** on the file system (where **<GAX_HOME>** is your home folder for the GAX application).
9. Delete the **gax-km** folder.
10. Start GAX.