GENESYS™

Business Edition Premise Provider's Guide

Email routing application

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Email routing application

Contents

Overview
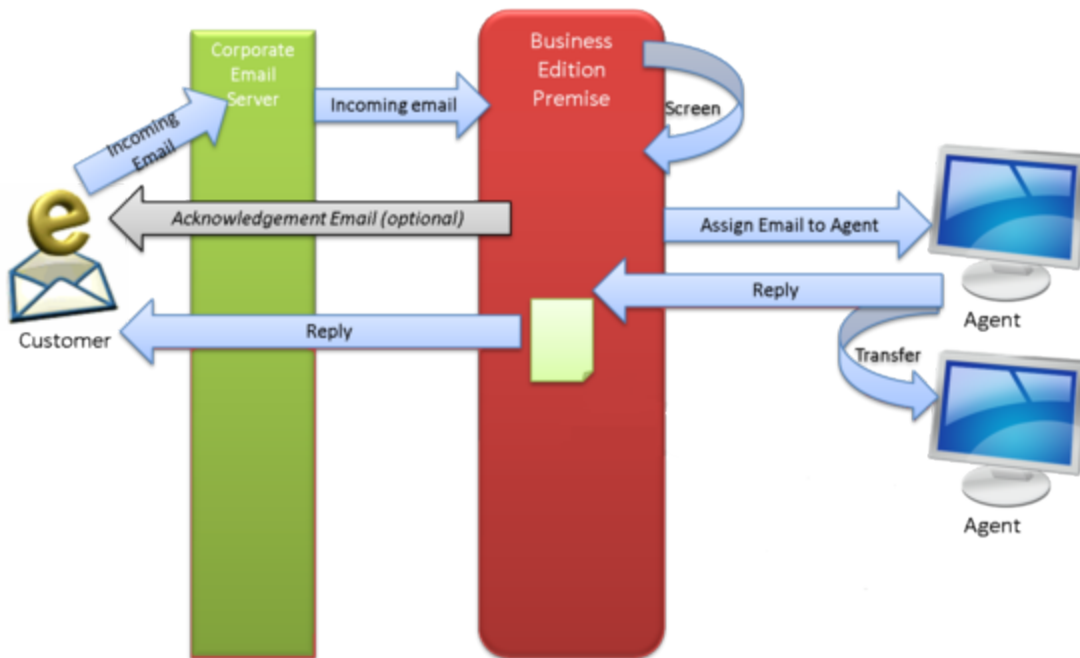
The Business Edition Premise email routing application can:

- Screen incoming email subject lines for recognized terms
- Distribute the email to a target agent group
- Send an acknowledgement based on contact center status

Important

Agents can send replies to incoming emails, but the routing strategy does not support the sending of unsolicited outbound emails.

Distribution

The screening rule determines the target and overflow agent groups. If the email is not handled by an agent from the *Email target agent group* within the *Email target timeout* (default is one hour), the email is routed to the *Email overflow target agent group*.

If the email is not handled by an agent from the overflow target agent group within the *Email overflow target timeout* (default is one day), the email returns either to the target agent group or to the overflow agent group, at a higher priority.

Acknowledgements

Like the voice routing application, the email application can send a different acknowledgement email based on the status of the contact center: open, closed, or special day.

Deployment

To deploy the Business Edition Premise routing applications, you deploy the solution definition in Genesys Administrator Extension (GAX). Solution definitions are also known as solution package definitions, or SPDs.

The email routing application also requires you to deploy eServices applications, import Knowledge Manager templates, and deploy the email strategy.

This section describes how to deploy the email routing application. Email deployment is optional; if you are not installing the email option, you can skip these steps.

Install the email solution definition

WATCH: A short demonstration of the email solution definition installation.

Link to video

1. In GAX, go to **Administration > Solution Definitions** and select **Genesys One OPM Email Parameters**.
2. Click **Related** (it's the gear icon) and select **Install**.
3. Complete the wizard, using default values except for:
   - GAX host: *VM host name*
   - Switch: eServices_Switch
   - Email address: the Do Not Reply address that you select for the customer mail server
   - Email Sample Configuration: True

Install Knowledge Manager

You need to install Knowledge Manager so you can import the Knowledge Manager templates in the next step.

1. Go to **http://*core VM host name or IP address*/ips** and copy the **kmgr_version** folder to the host where you want to install KM.
2. On the local host, unzip the file you copied.
3. Go to the Installation Package and install Knowledge Manager.
4. In GAX, go to **Environment** > **Application Templates**, and select **New**.
5. Click **Import Application Template**.

6. Browse for the **KnowledgeManager_851.apd** template, and then click **Save**.

7. In GAX, go to **Environment** > **Application**, and select **New**.

8. For **Name**, enter eServices_KnowledgeManager.

9. Select the Knowledge Manager template you created earlier and click **Apply**.

10. Go to the **Application Options** tab and under **Security**, set the **disable-rbac** option to **true**.

11. Go to the **Connection** tab and click **Add**.

12. Browse for **UCS** and click **OK**.

Import the Knowledge Manager templates

WATCH: A short demonstration of how to import the Knowledge Manager templates

Link to video

> ### Important
> Localized versions of the templates do not include the required categories, so even for localized environments you must import the **GenesysOne_KnowledgeManager_Rules_Responses_ENU.kme** file.

1. In Genesys Administrator, ensure that the eServices solution is started.

2. Go to: http://*VM host name or IP address*/ips and locate and download email_strategy_ext_*version*.zip.

3. Unzip the file.

4. Browse to email_strategy_ext\KNOWLEDGE and copy the **GenesysOne_KnowledgeManager_Rules_Responses_ENU.kme** file to a temp folder on the local disk.

5. Under Genesys Solutions\eServicesxxx\Knowledge Manager, start Knowledge Manager.

    - Username: default

    - Password: password

    - Application: eServices_KnowledgeManager

    - Host: *VM name*

6. Go to **File > Import** and select the kme file from the temp folder.
        Important:

    - Uncheck **Preserve uniqueness of objects**

    - Check **Update screening rules**.

        Click **OK** and ignore the 5 warnings.

7. If you are localizing your environment, and only after first importing the English kme file, you can import the localized kme files, one at a time (the example below uses the French version,

GenesysOne_KnowledgeManager_Rules_Responses_FRA.kme):

- On the VM host, copy the **GenesysOne_KnowledgeManager_Rules_Responses_FRA.kme** file (from the unzipped `email_strategy_ext_`*version*`.zip` file) to a temp folder on the local disk.

- Start Knowledge Manager

    - Application: `eServices_KnowledgeManager`

    - Host: *your VM name*

- Go to **File > Import** and select the kme file from the temp folder.
    Important:

    - Uncheck **Preserve uniqueness of objects**

    - Check **Update screening rules**.

        Click OK and ignore the 5 warnings.

8. If you are using Special Day Auto Responses in Email, you must manually change the Time Zones for AutoResponse:

    - Start Knowledge Manager.

    - Click **AutoResponse**, and then double-click **Special Day**.

    - Locate the two instances of **TimeZone** and replace them with the correct time zone IDs.
        Important: You must use time zone database IDs to indicate time zones. For a list of time zone database IDs, see http://en.wikipedia.org/wiki/List_of_tz_database_time_zones.

    - Click **Check field Codes** to view the Special Day Auto Response with the field codes rendered.

    - Click **OK**.

Deploy the email strategy (BEP version 8.5.000)

Download and deploy the email strategy. (For BEP versions 8.5.001 and higher, refer to this procedure.)

WATCH: A short demonstration of the email strategy deployment.

Link to video

1. In a browser, go to `http://`*core VM name or IP address*`/ips`. Locate, download, and extract the following zip files:

    - `email_strategy_`*version*`.zip`

    - `composer_`*version*`_enus.zip`

2. Install Composer 8.1.4 on a Windows system that is not a VM and is not already running Apache Tomcat (to avoid port conflicts). Follow the installation instructions in the Composer 8.1 Deployment Guide.
    Note that Composer 8.1.4 is an Eclipse plugin that requires JDK 1.7 and a supported version of Eclipse. Composer installs its own Apache Tomcat server.

3. Copy the **GenesysOne_Email** folder (from the `email_strategy_ext_`*version* zip that you just extracted) to a temp folder on the Composer system.

4. Open Composer and go to **File > Import > General > Existing Projects into Workspace**.

5. Choose **Select root directory** and then select the email strategy you copied from the VM.
     Important: Select the project from the newly populated list, ensuring **Copy projects into workspace** is enabled, and click **Finish**.

6. Verify that the local Tomcat server details are correct for your Composer installation:

   - Go to **Window > Preferences > Composer > Tomcat**.

   - Enter the **Port**, **Login** (admin), and **Password** (admin).

   - Check the Tomcat Location to confirm that it is on the local disk (for example, `c:\Program Files (x86)\GCTI\Composer 8.1\tomcat`).

7. In Composer Package Explorer, expand the GenesysOne_Email package, right-click **Interaction Processes > Email ixnprocess**, and select **Publish to Configuration Server** (you might first need to connect to Configuration Server from the Composer menu bar).

8. Right-click the package name and select **Properties**. Deploy the project.

9. Create a WAR file:

   - Right-click the package name and select **Export > Composer > Java Composer Project as WAR file**.

10. In the **Export** window, select **Export Composer WAR file to a location**. (You can ignore any warning messages that are generated.)

11. Copy the WAR file to ***VM host*\c$\GCTI\apache-tomcat\webapps**. The WAR file automatically extracts to a new **GenesysOne_Email** folder.

12. Point the new scripts to the correct server:

   - Open GA and go to **Provisioning > Routing/eServices > Orchestration**, which includes nine enhanced routing scripts.

   - Double-click **GenesysOne_Email.Email.Entered.Routing** and change the Orchestration URI to include the correct VM server name; for example, `http://g1-sngl-p:8380/GenesysOne_Email/IPD_Email_Entered.scxml`.

   - Repeat for each of the other scripts.

Deploy the email strategy (BEP version 8.5.001)

Download and deploy the email strategy.

1. In a browser, go to `http://core VM name or IP address/ips`. Locate, download, and extract the following zip file:

   - `email_strategy_version.zip`

2. Open Composer and go to **File > Import > General > Existing Projects into Workspace**.

3. Choose **Select root directory** and then select the folder for the **GenesysOne_Email** email strategy you extracted earlier.
     Important: Select the project from the newly populated list, ensuring **Copy projects into workspace** is enabled, and click **Finish**.

4. Verify that the local Tomcat server details are correct for your Composer installation:

   - Go to **Window > Preferences > Composer > Tomcat**.

- Enter the **Port**, **Login** (admin), and **Password** (admin).

- Check the Tomcat Location to confirm that it is on the local disk (for example, `c:\Program Files (x86)\GCTI\Composer 8.1\tomcat`).

5. Start Tomcat.

6. Right-click the package name and select **Properties**. Deploy the project.

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- Open GA and go to **Provisioning > Routing/eServices > Orchestration**, which includes nine enhanced routing scripts.

- Double-click **GenesysOne_Email.Email.Entered.Routing** and change the Orchestration URI to include the correct VM server name; for example, `http://g1-sngl-p:8380/GenesysOne_Email/IPD_Email_Entered.scxml`.

- Repeat for each of the other scripts.

Configuration

Business Edition Premise routing configuration occurs at two levels:

- Initial configuration, which involves the setup of auto-attendant menus, business rules, and other configuration objects, requires a basic understanding of Genesys software, particularly Genesys Administrator, SIP Server, and, for email, eServices Knowledge Manager.

- Administrative configuration, such as setting open hours and switching among auto-attendant menu trees, is a subset of the initial configuration tasks and takes place entirely within Genesys Administrator Extension (GAX). It requires no advanced knowledge of Genesys software.

You can configure different values for a number of routing parameters, such as open hours and call priority. To handle different call flow and email scenarios, you use GAX to create parameter groups based on the default parameter group templates supplied in Business Edition Premise.

Email solution definitions (SPDs)

Installation of the solution definitions (SPDs) automatically creates several objects. Configuration Server objects created by previous voice or email installations are not overwritten.

The Email SPD creates these objects:

- Parameters

- Parameter group templates

- Parameter groups

- Transaction (Technical, Email Default)

The Email SPD creates these additional samples (object name in parentheses):

- Agent groups (*AG_Email_Sample, AG_Email_Overflow_Sample, Email Supervisors*)

- Business attributes (*Disposition Code (Attributes), iWS_ToastUserData, iWS_UserData*)

- Capacity Rule (*GenesysOne_1Voice_1Email*)

- Persons (*AgentSample, SupervisorSample*)

- SIP Switch Virtual queue (*VQ_Default_email*)

- Transactions (*Category1OverrideIWS, Category2OverrideIWS, Category3OverrideIWS, Category4OverrideIWS, Category5OverrideIWS*)

Initial configuration

Initial configuration of the email routing application depends on the needs of the customer. In many cases, the defaults supplied in the solution definition will be sufficient.

You can adjust email routing parameters in either of two ways:

- To set new default values to be used in all new parameter groups that use the parameter, open Genesys Administrator Extension, navigate to **Routing Parameters > Parameters**, and adjust values as desired. Do not change Key Names.

- To set a new value that applies only to a specific parameter group, open Genesys Administrator Extension, navigate to **Routing Parameters > Parameter groups**, and adjust values as desired.

1. Configure screening rules

You can use the eServices Knowledge Manager application to customize the screening rules used to route email to any of the five Category parameter groups.

"Content screening", in the **Overview** section, explains how screening works in Business Edition Premise.

"Screening Rules" in the eServices 8.1 User's Guide explains how to use the Screening Rule Editor and details how the rules work.

2. Configure email acknowledgements

You can also use the eServices Knowledge Manager application to customize the text of the acknowledgement emails: **Email acknowledgement body open hours**, **Email acknowledgement body closed hours**, and **Email acknowledgement body special days**, as well as the opening (salutation), closing, and time zone.

"Using Categories and Standard Responses" in the eServices 8.1 User's Guide explains how to edit the acknowledgement content.

3. Configure distribution

After you customize the screening rules, you can adjust their associated parameter groups to distribute emails to the correct targets. If you added the term "sales" to the Category 3 screening rule, for example, you can route emails with "sales" in their subject lines to a particular target agent group by setting the Category 3 parameter group **Email target** value to the Sales agent group.

You can also enable or disable supervisor review, and change the percentage of emails subject to review.

4. Set open hours and special days

The parameter **Email open hours** sets the standard hours that your office is open during the week. Use the **Email special day** parameter to set:

- The dates or days of the week on which your office is closed for the entire day.
- The dates or days of the week on which your office is closed for only part of the day. In these cases, you use the **Time Ranges** field in GAX to set the hours that you will be open on that date.

Specific dates set in **Email open hours** are treated as special days. Hours set for the same date or day of the week in **Email special day** override those set in **Email open hours**; for example, if **Email open hours** specifies that you are open from 9AM to noon on December 31, and **Email special day** sets the hours of 11AM-2PM for the same date, people who send an email at 10AM on that date receive the special day acknowledgement.

Similarly, in both parameters, date patterns higher in the list take precedence over those lower in the list.

5. Tune priorities

You can adjust the priority of emails using the two priority tuning parameters:

- **Email priority** sets the initial email priority; you typically have little reason to change the default of 100.
- **Email overflow priority** sets the priority of emails that exceed the **Email target timeout**. The default value is also 100, which means that emails that have already passed the overflow timeout will be re-queued based solely on their age, ensuring that the oldest emails will appear in the queue first.

6. Send a test email

To verify that Business Edition Premise is correctly receiving and routing emails, send a test email:

1. Install an email client and ensure that it connects to your email server.
2. Send an email to the address specified during the eServices SPD deployment.
3. In GAX, add the **Agents** Access Group to the **AgentSample** user account.
4. Ensure that you have installed an Workspace Desktop Edition (WDE) client (you did this when you were making a test call during the voice routing configuration). Launch WDE and log in using these

    credentials:

- User Name: `AgentSample`
- Password: `AgentSample`

5. If Business Edition Premise is successfully installed, a WDE interaction window containing the email appears when the email arrives.

7. Configure UCS database pruning

Genesys recommends that you configure automatic pruning of the Universal Contact Server (UCS) database to prevent it from growing too large in size.

> ### Important
>
> Changes made to the UCS database maintenance settings will apply to all deployed media strategies (Voice, Email, Chat, and Outbound).

1. On the VM host, log in to Universal Contact Server Manager.
2. Select the **Scheduled task on Main DB** tab.
3. Configure the **Main DB** maintenance settings as desired.
4. Click **Save**.

Operational Parameters

This section describes the operational parameters that are available for the email routing application. For instructions on setting these parameters, see Configuration.

Acknowledgements

[+] Show parameters.

Parameter	Values (default in bold)	Mandatory?	Description
Email acknowledgement	**True**, False	Yes	Sends customer an acknowledgement email, content depending on whether you are open, closed, or on a special day
Email acknowledgement body open hours	**Thank you for your email. We will get back to you as soon as possible.**, *text string entered in Value*	Yes	The body text used for acknowledgements sent during regular hours

Parameter	Values (default in bold)	Mandatory?	Description
	field		
Email acknowledgement body closed hours	**Thank you for your email. We are currently closed and will get back to you as soon as possible. Our office hours are:**, *text string entered in Value field*	Yes	The body text used for acknowledgements sent during closed hours
Email acknowledgement body special days	**Thank you for your email. We are currently closed and will get back to you as soon as possible. Our office reopens on** *date*, *text string entered in Value field*	Yes	The body text used for acknowledgements sent during special days
Email acknowledgement opening	**Dear** *Customer name*, *text string entered in Value field*	Yes	The greeting to the customer at the beginning of the acknowledgement
Email acknowledgement closing	**Regards**, *text string entered in Value field*	Yes	The closing term to the customer at the end of the acknowledgement
Email acknowledgement time zone	**[none]**, *free-form text such as* `Central Time` *or* `GMT`	No	The time zone text that you want to include in your email acknowledgements.
Email from	**[none]**, *email address*	No	The email address (typically DoNotReply) used in sending email responses to customers

Contact center status

[+] Show parameters.

Parameter	Values (default in bold)	Mandatory?	Description
Email open hours	**From Monday to Friday, 0800-2000, closed Saturday and Sunday**, *any value set in the **Value > Date Pattern** field*	Yes	Sets the hours that you are open and accepting emails; to specify open hours on specific dates, you must place the date above all day-of-week entries
Email special day	**December 25, January 1**, *any value set in the **Value > Date**	No	A list of exceptions to the regular open hours, for a holiday or other

Parameter	Values (default in bold)	Mandatory?	Description
Pattern field			reason.

Distribution

[+] Show parameters.

Parameter	Values (default in bold)	Mandatory?	Description
Email screening	**True**, False	Yes	Enables email screening rules
Email target	**[none]**, *agent group*	Yes	The agent group that first receives all emails
Email overflow target	**[none]**, *agent group*	No	The agent group that receives all emails that exceed the overflow target timeout
Email target timeout	**3600**, *integer between 1 and 99999*	No	The length of time (in seconds) that an email can go unattended before being passed to the overflow agent group
Email overflow target timeout	**86400** (24 hours), *integer between 1 and 99999*	No	The length of time (in seconds) that an email can go unattended before being passed to the first available agent group (either target or overflow)
Email supervisor review	**False**, True	Yes	Enables supervisor review.
Email supervisor review percentage	**100**, *integer between 0 and 100*	Yes	The percentage of emails routed to supervisors for review
Email supervisor agent group	**[none]**, *agent group*	No	The supervisor agent group that receives the emails when supervisor review is enabled
Email default virtual queue	**VQ_Default_email**, *a target virtual queue set in GA*	Yes	The default virtual queue to which all emails are routed, for reporting

Priority tuning

[+] Show parameters.

Parameter	Values (default in bold)	Mandatory?	Description
Email priority	**100**, *integer between 1 and 99999*	Yes	The initial priority assigned to each incoming email
Email overflow priority	**100**, *integer between 1 and 99999*	Yes	The priority assigned to all emails that exceed the overflow target timeout