Genesys Intelligent Automation Bots Integration Guide

Deploying Chat Bots

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Deploying Chat Bots

Genesys Intelligent Automation can provide your customers with chat bot-based access to your WebIVR applications. Customers can converse with a bot using natural language to accomplish various business needs, such as making a payment or checking an account balance.

> **Warning**
>
> Please note that the customer is responsible for ensuring that the environment and bot applications they build are properly configured and secured according to PII and HIPAA requirements.

PureConnect

For information on deploying PureConnect chatbots, see PureConnect with Genesys Intelligent Automation for more information.

Genesys Engage

The following components are required:

- Digital Messaging Server 9.0.x - Provides the bot platform.
- Genesys Administrator - Used for configuring the chat bot client.
- Interaction Routing Designer - Provides the routing strategy.

> **Important**
>
> For SMS (Short Message Service) functionality, you must also install Social Messaging Server 8.5.x with SMS plugin.

> **Important**
>
> To test your bot functionality using Virtual Call, please set the **Channel** field to `WEBCHAT` when starting your Virtual Call session..

Once installed, the bot acts similarly to a WebIVR application using prompts from the associated

visual persona. However, if using SMS, remember that customers cannot use special characters in response to queries from the bot.

Preparing the chatbot environment

Install Digital Messaging Server

1. Refer to the Digital Messaging Server Guide for information on how to install Digital Messaging Server.
2. Copy the chatbot jar file (fish-cbp-<version>.jar) to the Digital Messaging Server subfolder for chatbots. For example: **C:\Program Files\GCTI\eServices 9.0\Digital Messaging Server\DMS\media-channel-drivers\channel-chatbot\bots-repo**.

Use Genesys Administrator to configure Digital Messaging Server

1. Open Genesys Administrator and log in to your configuration environment.
2. Go to **Provisioning > Environment > Applications** and open the Digital Messaging Server object.
3. Create a section called `channel-chatbot-monitor-bots`.
4. Create a chatbot option. You must ensure the option name exactly matches the name of the jar file that you previously uploaded to Digital Messaging Server. For example: `fish-cbp-9.0.0.jar`.
5. Set the value of the chatbot option to point to the load balancer for VUI Server. You can also add the parameters **downstream_request_timeout_millis** and **session_timeout_minutes** to set timeout values. In the following example, the request timeout is **120000** milliseconds (120 seconds) and the session timeout is **30** minutes:

```
{
 "base_url" : "http://www.yourcompany.com:8081/fish-vui",
 "downstream_request_timeout_millis" : 120000,
 "session_timeout_minutes" : 30
 }
```

> **Important**
>
> Set the **RPC cache timeout** field value to zero. See RPC cache timeout for detailed explanation on this setting.

6. Click **Save & Close**.

> ## Important
>
> Starting from 9.0.109.00 release, IA provides support for proxy servers. The following optional parameters can be passed to the **fish-cbp** jar file:
>
> - **x_vui_proxy_host** - The proxy server URL or IP address
> - **x_vui_proxy_port** - The port number
> - **x_vui_proxy_username** and **x_vui_proxy_password** - The credentials to access the proxy server. Required only when the proxy server requires authentication.
>
> Example:
>
> ```
> {
> "base_url" : "http://www.yourcompany.com:8081/fish-vui",
> "downstream_request_timeout_millis" : 120000,
> "session_timeout_minutes" : 30,
> "x_vui_proxy_host" : "proxy_server_url",
> "x_vui_proxy_port" : "port_number",
> "x_vui_proxy_username": "username",
> "x_vui_proxy_password": "password"
> }
> ```
>
> If the proxy server information is not configured or are empty, the VUI server will be accessed directly.
>
> Starting from 9.0.109.02 release, IA supports configuring the default error message that is displayed when the connection between the Chat Bot Platform (CBP) and VUI fails. The new optional JSON entity, **x_vui_default_error_msg**, can be used to configure the message.

Starting from 9.0.110.xx release, IA supports configuring the connection pool mechanism with three new optional parameters: `max_total_http_connections`, `max_route_http_connections`, and `connection_pool_maintenance_delay_millis`.

Parameter Name	Description	Default Value
max_total_http_connections	The maximum total number of idle and borrowed connections that can be active at the same time.	200
max_route_http_connections	The maximum limit of connections on a per-route (host) basis.	200
connection_pool_maintenance_delay_millis	The time delay in milli-seconds after which a pool's connection is validated and expired connections are terminated.	500

```
{
...
"max_total_http_connections" : 200,
"max_route_http_connectionsi" : 100,
```

```
"connection_pool_maintenance_delay_millis" : 1000,
...
}
```

(Optional) Use Genesys Administrator to configure SMS Server

> ### Important
>
> - Use this section only if you want to provide SMS (Short Message Service) access to your chatbot. Otherwise, go to the next section.
> - Refer to SMS Server (part of eServices) documentation for more information on SMS Server.
> - This feature uses the *Session Mode* of SMS Server, which refers to creating and keeping an interactive conversation between a mobile client and an agent in the form of a conventional chat session. All messages received and sent during this session are associated with one interaction, which corresponds to this SMS session.

1. Open Genesys Administrator and log in to your configuration environment.
2. Go to **Provisioning > Environment > Applications** and open the SMS Server object.
3. Open the channel that you want to use with the bot.
4. For the option **inbound-route**, specify the access point in your routing strategy that is used to place submitted interactions for incoming messages.
5. Click **Save & Close**.

Use Interaction Routing Designer to configure the chatbot

Once you have installed the bot interface, you can use Interaction Routing Designer to configure settings.

1. Open Interaction Routing Designer and log in to your environment.
2. Open the routing strategy that is triggered by the *session* endpoint, and add an **External service** block to the start of the flow.
3. Open the **External service** block and go to the **General** tab. Configure the settings as described below:
   - **Application type** - Set to the Digital Messaging Server or Social Messaging Server in your environment.
   - **Application name** - Set to the Digital Messaging Server or Social Messaging Server in your environment.
   - **Service** - Set to `ChatBotPlatform`.
   - **Method** - Set to `StartBot`.

In the **Parameters** section, add the following:

- **Nickname** - The bot name displayed to customers.
- **SiteID** - The ID number of your Genesys Intelligent Automation application to use with the bot.
- **IsTestCall** - If **true**, the test version of the application is used. Otherwise, set to **false** to use the production version.
- **AuthToken** - The value of the **Authentication Key** field in your company page.
- **StopBotOnAgentArrival** - Set to **true** if you want the bot to end once an agent joins the session. Otherwise, set to **false**.
- **StopBotOnCustomerLeft** - Set to **true** if you want the bot session to end once a customer leaves the session. Otherwise, set to **false**.
- **Visibility** - Set to **ALL**.
- **ChatBotID** - Set to `speechstorm-chatbot`.
- **ChatBotName** - Do not enter information in this field.
- **_umsChannel** - Set to `channel-chatbot`.

4. Click **OK**.

Genesys recommends that you add new blocks to your routing strategy, just after the **External service** block, to pause the strategy until the chatbot has completed its task. Otherwise, the routing strategy might queue up the session for an agent and, as soon as an agent joins, the **StopBotOnAgentArrival** parameter will cause the bot to terminate early.

To determine if a chatbot interaction is still alive, Genesys Intelligent Automation checks the following interaction data values:

- **IsOnline** - If the value is **0**, the bot is offline and you can terminate the interaction.
- **FishTransferRequested** - If the value is **true**, you can proceed to route the interaction to an agent.

Refer to the Interaction Routing Designer documentation or consult your Genesys representative for information on the best routing strategy for your environment.