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Social Media Solution Guide

Setting Up Social Engagement 8.5.2 or Later

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Overview

Social Engagement 8.5.2 introduced new data architecture. From 8.5.2 onwards, the API connectors to Twitter and Facebook are stored in the Genesys cloud. This allows the Genesys Engineering team to quickly adapt to changes to the APIs made by Twitter and Facebook, and thus protect customers from the volatility inherent in connecting to Social Networks via APIs. Now, besides installing Twitter and Facebook drivers on-premise, you must also set up and configure the cloud component (known as Genesys Social Admin or GSA).

Legal Terms for Social Engagement 8.5.2

Important

If you have not already done so, please read and accept these terms to continue.

Installing On-premise Components

Important

Regardless of whether you are a new customer or an existing customer upgrading, it's critical that you have already read and accepted the legal terms referenced above.

For New Social Engagement Customers:

1. Install [Social Messaging Server](#).
2. [Install Social Engagement 8.5.2](#)

For Existing Social Engagement Customers:

1. Uninstall your existing drivers and remove their configuration options, as described [here](#).
2. Proceed to install Social Engagement 8.5.2, as described in the following section.

Installing Social Engagement 8.5.2

1. Download the installation packages for Genesys Cloud API Driver for Twitter and Genesys Cloud API
-

Driver for Facebook.

2. Locate the installation script for each driver (**install.exe** for windows and **install.sh** for Linux platforms) and run it.
3. While running the script you will be asked to enter/confirm:
 - Host Name
 - Configuration Server Host Name
 - Network port
 - Username
 - Password
4. Select a Social Messaging Server object.
5. Answer any other questions and finish the installation.
6. If you are an existing customer,
 - a. In Genesys Administrator Extension, select the Social Messaging Server object, go to the **Options** tab, and select **Import**.
 - b. Import the configuration files **driver-for-facebook-options.cfg** for Facebook and **driver-for-twitter-options.cfg** for Twitter (usually located in **...SMServer/media-channel-drivers/channel-facebook** and **.../SMServer/media-channel-drivers/channel-twitter**). Select to *NOT* override the existing configuration options. At this point, you have two new configuration sections: **[channel-facebook]** and **[channel-twitter]**. For more information on importing .cfg files, see the [Genesys Administrator Extension User Guide](#).
7. Use Genesys Administrator Extension to configure your Social Messaging Server application for the **Twitter** and **Facebook** driver channels. For more information about the Social Messaging Server options, see [Social Messaging Server Options](#).

Preparing for the Cloud Integration

After you have completed the above steps, you can gather the following information:

1. Identify and note the name of the company/organization that will be using the product—for example, XYZ Corp. This is your Account name for Genesys Social Admin.
2. **For Twitter:**
 - a. Identify and note the handle, (and optionally, keyword strings) that you plan to use for your Twitter feed:
 - In most instances, using just the Twitter handle used for responding will be a sufficient first step; for example, '@XYZCorp_Help'.
 - It is **CRITICAL** that only the appropriate keywords are used. Twitter does not permit infinite access to the Twitter data feed. If very broad or popular keywords are used inappropriately, too much data will be consumed. If keywords such as: #JustinBieber, #iphone, #awesome were used the likely result would be a data failure.
 - Testing for keywords may be necessary in order to check and see if they are inappropriate. To do this go to <https://twitter.com/search-home> and enter the keyword(s) you plan to use (one at a time). View the search results and if they are relevant. Only relevant keywords should be used.

- b. Note the login and password credentials for any twitter handles you intend to use with Social Engagement.

3. For Facebook:

- a. Identify and note the names of the of the Facebook pages that you plan to use.
- b. Note the login and password credentials for the user that has administrator access to these Facebook pages.

Note also the following:

- **Ports**—Both Twitter and Facebook drivers (installed in Social Messaging Server) connect to the Social Admin platform (in the Genesys cloud) using HTTPS on standard port 443. All API calls must go over HTTPS.
- **Copy, Paste, Save**—In the first seven steps of the following setup you will have to copy and save various pieces of text in order to use them in later steps. Please have a plain-text editor ready on your desktop and be prepared to save text (along with descriptions regarding the text) from steps 1 through 7.

Cloud Integration

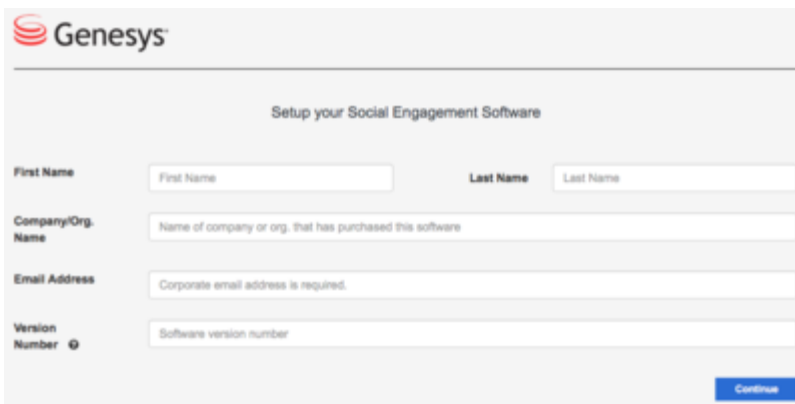
Contents of this section:

1. [Set up an account](#)
2. [Create a Twitter account channel](#)
3. [Create a Twitter service channel](#)
4. [Create a Facebook account channel](#)
5. [Create a Facebook service channel](#)
6. [Define an Admin user](#)
7. [Configure connections](#)
8. [Using more than one Twitter handle](#)

1. Set up your company/organization account

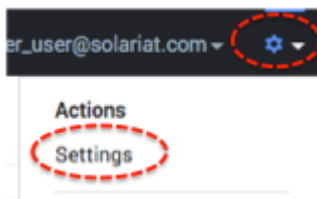
The first step of deploying Social Engagement requires you to create an Account within the Social Admin component of Social Engagement.

- a. Navigate to <https://socialanalytics.genesyscloud.com/gse/signup>. You should see a form titled "Setup your Social Engagement Software."

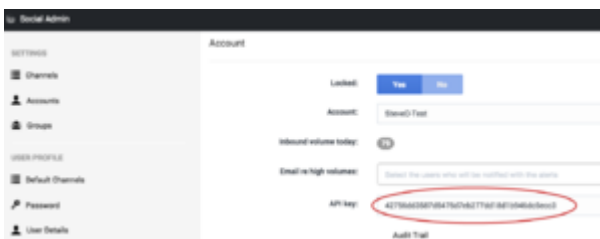


Setup Form

- b. Populate the fields. Note and copy the value of **Company/Org. Name** to your text file (for example, **Company/Org. Name: ##> ACME XYZ123 Corp.**) You'll use this text in a later step of this setup.
- c. Click **Continue**.
- d. Go to your email inbox and open the email titled "Confirmation required for Genesys Social Engagement deployment". If you don't see it, check your spam folder.
- e. Follow the steps described in the email and select the option to log in using the email and password you've just created.
- f. After successfully logging in, navigate to the top right hand corner of the screen and click on the small gear icon and then on the **Settings** option from the drop-down that appears.



- g. In the next view, click the **Accounts** options.
- h. Click the pencil icon to open the edit view for the account that you have just created
- i. In the edit view of your account, copy and paste the value of the **API key** field to your text file. You'll need it in a later stage of this setup.



API key

- j. At this point it is not necessary to make any changes to the other fields and attributes on this form.

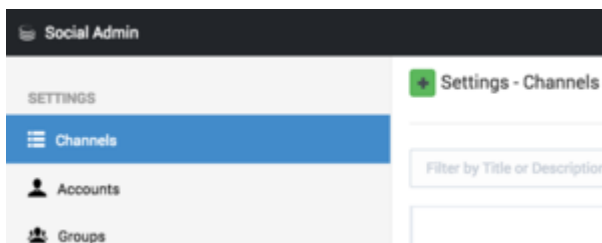
2. Create a Twitter channel with the type Twitter:Account

The Twitter Channel with channel type 'Twitter:Account' is the mechanism you will use to authenticate to Twitter. Please be ready with your organization's Twitter handle (login) and Twitter password before proceeding.

Important

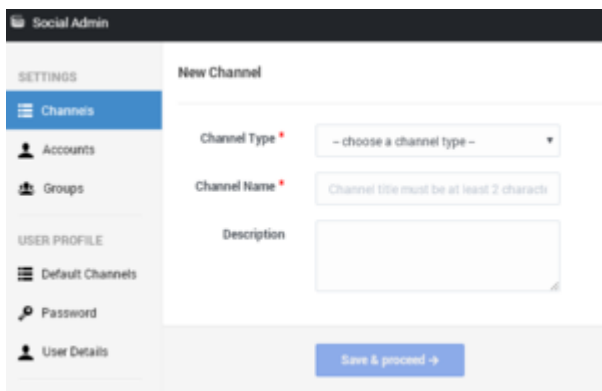
Your company or organization may use multiple Twitter handles. [Step 8 below](#) describes how to handle this situation.

- Navigate to the top right hand corner of the screen and click the small gear icon, then click **Settings** on the drop-down that appears.
- In the following view, select **Channels**, then click the green + icon to create a new channel.



Settings-Channels

The **New Channel** window displays.



New Channel

- From the **Channel Type** drop-down, select **Twitter:Account**.
- Add a Channel Name. Please use the form <your channel's Twitter handle> - Twitter Account. Example: @Genesys - Twitter Account.
- Optionally, add a description that indicates the planned usage of the channel.
- Click **Save and Proceed**.
- An extended form displays. On it is a Channel ID, as shown in the figure below. Make a note of this Channel ID—it will be needed for a later step

Channel ID 56969911f62f593e634558ee

h. Click **Login to Twitter**.



i. Enter the Twitter credentials for your organization: username (handle) or email, and the password associated with your Twitter account. IMPORTANT: Also check **Remember me**.

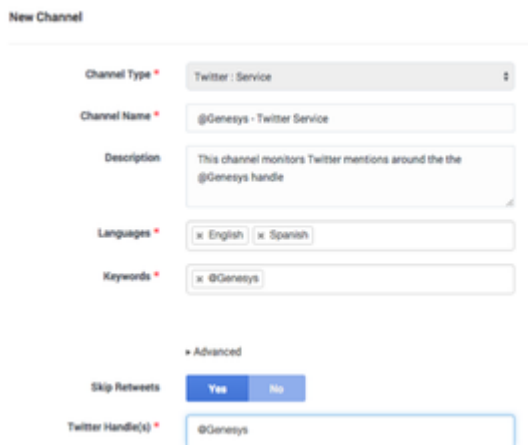


j. A window that displays **Access_token successfully saved** indicates that you have successfully authenticated to Twitter.

3. Create a Twitter channel with the type Twitter:Service

A Twitter channel of type Twitter:Service will listen for mentions of your keyword(s) on Twitter.

- a. Navigate to the top right hand corner of the screen, click the small gear icon, and select **Settings**.
- b. In the following view, select **Channels**, then click the green + icon to create a new channel
- c. In the **New Channel** window (see the figure **New Channel** above):
 - i. From the **Channel Type** drop-down, select **Twitter:Service**.
 - ii. Add a Channel Name. Please use the convention '<your channel's Twitter handle> - Twitter Service'. Example: @Genesys - Twitter Service.
 - iii. Optionally, add a **Description**.
 - iv. Click **Save & proceed**.
- d. An extended form displays.



The screenshot shows a 'New Channel' form with the following fields and options:

- Channel Type**: Dropdown menu set to 'Twitter: Service'.
- Channel Name**: Text input field containing '@Genesys - Twitter Service'.
- Description**: Text area containing 'This channel monitors Twitter mentions around the the @Genesys handle'.
- Languages**: Selection buttons for 'English' and 'Spanish', both of which are selected.
- Keywords**: Text input field containing '@Genesys'.
- Advanced**: A section header with a plus sign.
- Skip Retweets**: Two radio buttons, 'Yes' and 'No', with 'Yes' selected.
- Twitter Handle(s)**: Text input field containing '@Genesys'.

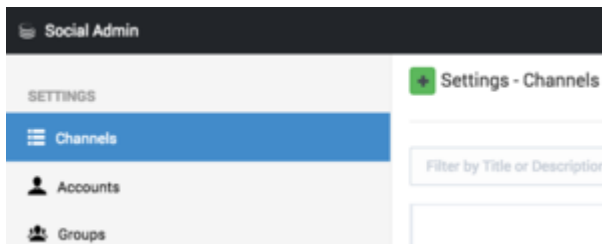
New Channel, extended

- i. Click in **Languages** to select one or more languages.
 - ii. In **Keywords**, type the handle you will be using to listen for mentions, for example @Genesys, then hit Return or Tab. This will have the effect of sourcing all tweets based on the handle that you use.
- If there is a need, you may source additional posts by populating other words and phrases in the keyword field; for example, #Genesys.
 - It is not possible to exclude posts with certain mentions, while including others. The inclusion of words or phrases in the keyword field is the only mechanism for sourcing posts from Twitter. If you have a need to use a broader range of words and phrases, it is important to review [Best Practices for Managing Keywords in Twitter Service Channels](#) below.
 - Click **Yes** if you want to Skip Retweets. Skipping retweets means your system will not source tweets that have been retweeted, which may help cut out clutter and noise. You may want to select **No** if you want to analyze retweets and viral activity.
 - In **Twitter Handle(s)**, just type the Twitter handle that you will be using to respond, example @Genesys. It is only possible to respond with one handle per channel. If you need to create multiple channels for the purpose of responding using different channels, this is addressed later in step 9.
 - Click **Update and Proceed**.

4. Create a Facebook channel with the type Facebook:Account

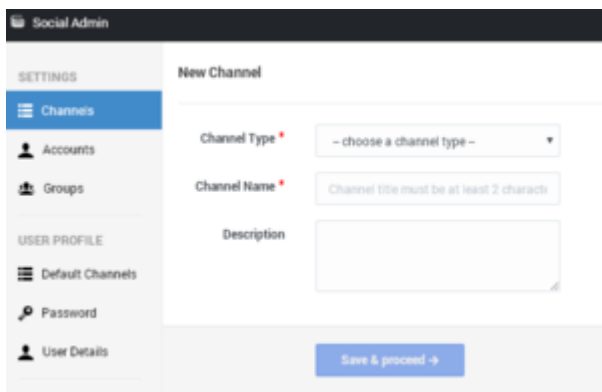
A Facebook channel of this type is the mechanism you will use to authenticate to Facebook. Please be ready with your organization's Facebook administrator login credentials for the relevant page(s) before proceeding. For simplicity, please make sure that you are currently logged into Facebook (with this administrator's password) using the same browser that you are using for this setup.

- a. Navigate to the top right hand corner of the screen and click the small gear icon, then click **Settings** on the drop-down that appears.
- b. In the following view, select **Channels**, then click the green + icon to create a new channel.



Settings-Channels

The **New Channel** window displays.



New Channel

- c. From the **Channel Type** drop-down, select **Facebook:Account**.
- d. Add a Channel Name. Please use the convention <company name> - Facebook Account. Example: Genesys - Facebook Account.
- e. Optionally, add a description that indicates the planned usage of the channel.
- f. Click **Save and Proceed**.
- g. An extended form displays.

Update Channel

Account: SteveO-Test

Channel Type: Facebook

Channel Name: Genesys - Facebook Account

Channel ID: 5695a8405fc137a8080e1fd

Description: Source data regarding the Facebook pages managed by Genesys

Authorize Social account: [Login to Facebook](#)

Update Channel

- h. Make a note of the Channel ID—it will be needed for a later step
- i. Click **Login to Facebook**. A pop-up appears asking you to log in to Facebook



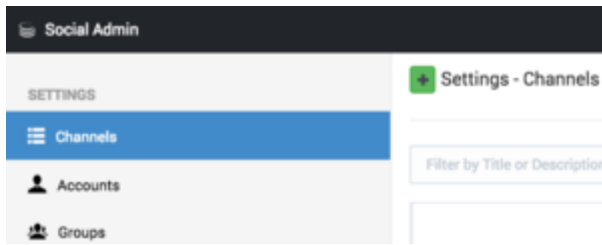
Facebook Login

- j. Log in with the admin credentials for the Facebook pages that you want to use. It is important that these user credentials have Facebook admin access to all of the Facebook pages to be used.
- k. Once you have logged in and authenticated you should see a message **access_token successfully saved, close window**. You may close this window.

5. Create a Facebook channel with the type Facebook:Service

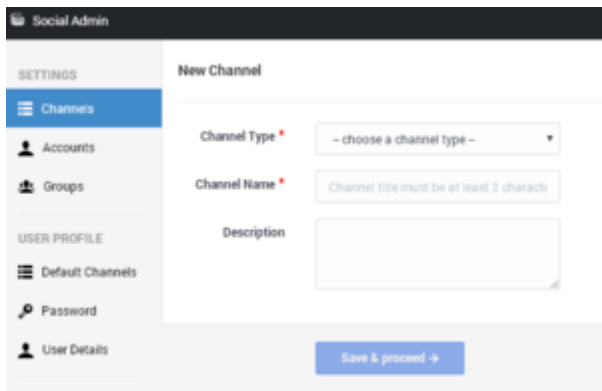
A Facebook channel of this type is used to listen for posts, comments, and messages on Facebook.

- a. Navigate to the top right hand corner of the screen and click the small gear icon, then click **Settings** on the drop-down that appears.
- b. In the following view, select **Channels**, then click the green + icon to create a new channel.



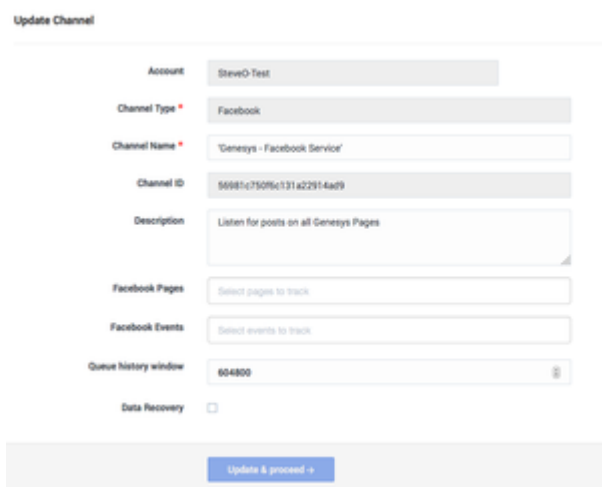
Settings-Channels

The **New Channel** window displays.



New Channel

- c. From the **Channel Type** drop-down, select **Facebook:Service**.
- d. Add a Channel Name. Please use the convention <company name> - Facebook Service. Example: Genesys - Facebook Service.
- e. Optionally, add a description that indicates the planned usage of the channel.
- f. Click **Save and Proceed**.
- g. **Update Channel** displays.



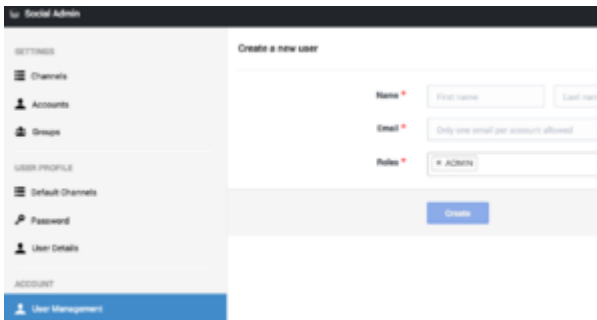
Update Channel

- h. Make a note of the Channel ID—it will be needed for a later step
- i. Click **Facebook Pages** to get a drop-down list of all of the Facebook pages that the Facebook user is an administrator of. Select each page that you want to monitor.
- j. Click **Update & proceed.**

6. Define an Admin user for the account

You will also have to create a new admin user login and password in order to facilitate communication with Social Messaging Server.

- a. Navigate to the top right hand corner of the screen and click the small gear icon, then click **Settings** on the drop-down that appears.



New User

- b. From the following view, select **User Management.**
- c. In the **First Name** field, type the company's name followed by a 1; for example, Genesys1.
- d. In the **Last Name** field, type admin.
- e. In the **Email** field, type an email address using a format like the following: Genesys1_Admin@GenSocialEngage.com. Copy and paste this email address to your notepad file as it will be used for a later step of the deployment.

Important

This email address will not be used for sending or receiving emails. It is only used to manage logging in, and communications between the cloud and on-premise components of Genesys Social Engagement.

- f. Make sure that **Admin** is selected in the **Roles** field.
- g. Click **Create.**
- h. Now return to **User Management.** You should see a list of the users associated with the account that you have set up.



User Management

- i. Click **Reset Password** for the admin user that you have just created.
- j. Enter a new password, and make a note of it (copy and paste to your text file); also make a note of associated email address. You will use them in a later step of the deployment.

7. Configure connections

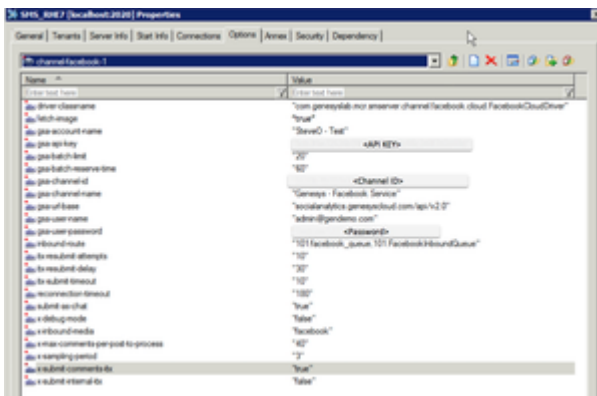
To configure connections between the on-premise Social Messaging Server and the cloud-based Account and Channels that you set up in Steps 1 through 5 above, you must set values for certain configuration options.

- a. **Import the configuration options files**, being sure to select **No** in response to **Do you want to overwrite the existing data?**
- b. Set option values both the Twitter and Facebook Drivers. The values are based on the setup in Steps 1–6. Be sure that your text file has all of the text that you've copied and pasted clearly identified. Set the option values by copying and pasting the exact values from your text file (complete descriptions of these options are on [this page](#)).

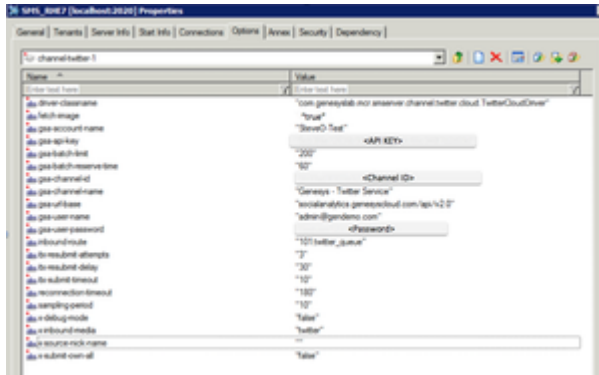
Option Values

Option	Value
gsa-account-name	Company/Organization name from Step 1
gsa-api-key	API key from Step 1
gsa-channel-id	Facebook—Facebook:Service Channel ID from Step 5
	Twitter—Twitter:Service Channel ID from Step 3
gsa-channel-name	Facebook—Facebook:Service channel name in Step 5
	Twitter—The exact text used in the Twitter:Service channel name from Step 3
gsa-url-base	socialanalytics.genesyscloud.com/api/v2.0
gsa-user-name	The admin email address from Step 6
gsa-user-password	The admin password from Step 6

Sample values are shown in the following figures (click to enlarge). Note that the values of **gsa-api-key**, **gsa-channel-id**, and **gsa-user-password** are masked in these figures for privacy.



Facebook Sample



Twitter Sample

- c. Test both channels by submitting posts via Twitter and Facebook, and seeing if they appear in the customer's Workspace.

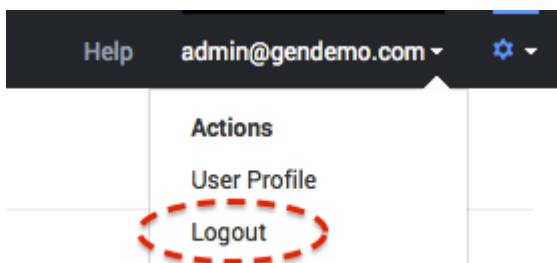
8. Using more than one Twitter handle to respond to customers

Use this step if a Genesys customer has two or more Twitter handles (for example, @ACMEXYXCorp1, @ACMEXYZCorp2) that they wish to use for conversing with customers on Twitter.

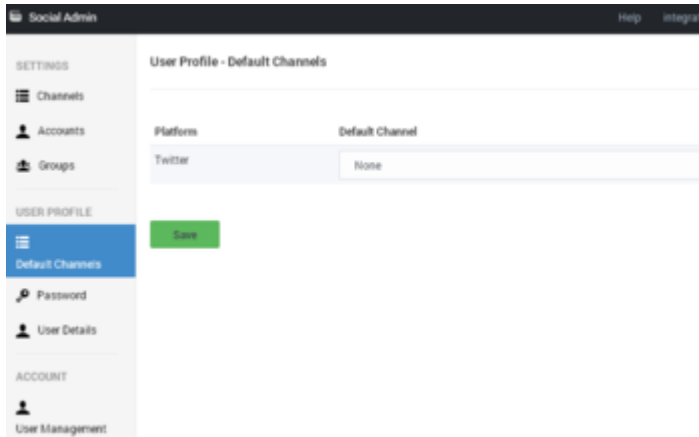
Important

The best practice for Facebook is to make the user that is authenticated to Facebook and admin user of ALL of the pages that will be selected for monitoring in step 5. This will mean that the step outlined here will not be necessary for Facebook.

- a. Repeat Steps 2 and 3 above to configure another pair of Twitter:Account and Twitter:Service channels using another twitter handle.
- b. Repeat Step 6 to add another admin and set a password, taking care to note the new email that you use and password. These will be used in a later step.
- c. Log out of <https://socialanalytics.genesyscloud.com>



- d. Now use the admin credentials just created to log in again to <https://socialanalytics.genesyscloud.com>
- e. Navigate to the top right hand corner of the screen and click the small gear icon, then click **Settings** on the drop-down that appears.
- f. Click **Default Channels**.



Default Channels

- g. From the pulldown, select the Twitter:Account channel that you just created.
- h. Now repeat Step 7: import another Twitter channel configuration template and set the options using the values of the new Twitter:Service handle and the additional admin email and password that you just created.

Best Practices for Managing Keywords in Twitter Service Channels

When setting up a Twitter:Service channel, you have the option to add any text in the Keyword field. It is important to use only appropriate keywords. If your keywords are very common or popular, your inbound feed may be cluttered with too many useless posts. In extreme scenarios, Twitter may cut off access to data if the data volumes are too high. This might occur for example if you were to input keywords such *#awesome* or *hello*. (Go to www.twitter.com for more information regarding rate limits.)

If one were to set up a channel to monitor mentions of Genesys on Twitter, some appropriate keywords and phrases would include: *@Genesys*, *#Genesys*, and *Genesys software*.

It is essential to check that keywords you use are not too broad or ambiguous. Go to <https://twitter.com/search-home> and check the keyword(s) you plan to use (one at a time). You will need to view the search results and assess the results. If there were a company called "United Ultra Local Bank Inc." one might be inclined to use the keyword *#United*. This would be a mistake, as it would source a flood of unnecessary posts from Twitter users that are submitting posts relating to *#United Nations*, *#United States*, *Manchester #United*, and so on. Even worse would be *#Check*, *savings account*, *#balance*, or *overdraft* as these are even more generic.