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# Developer's Guide

## Customizing the Engagement Strategy

5/4/2025

# Customizing the Engagement Strategy

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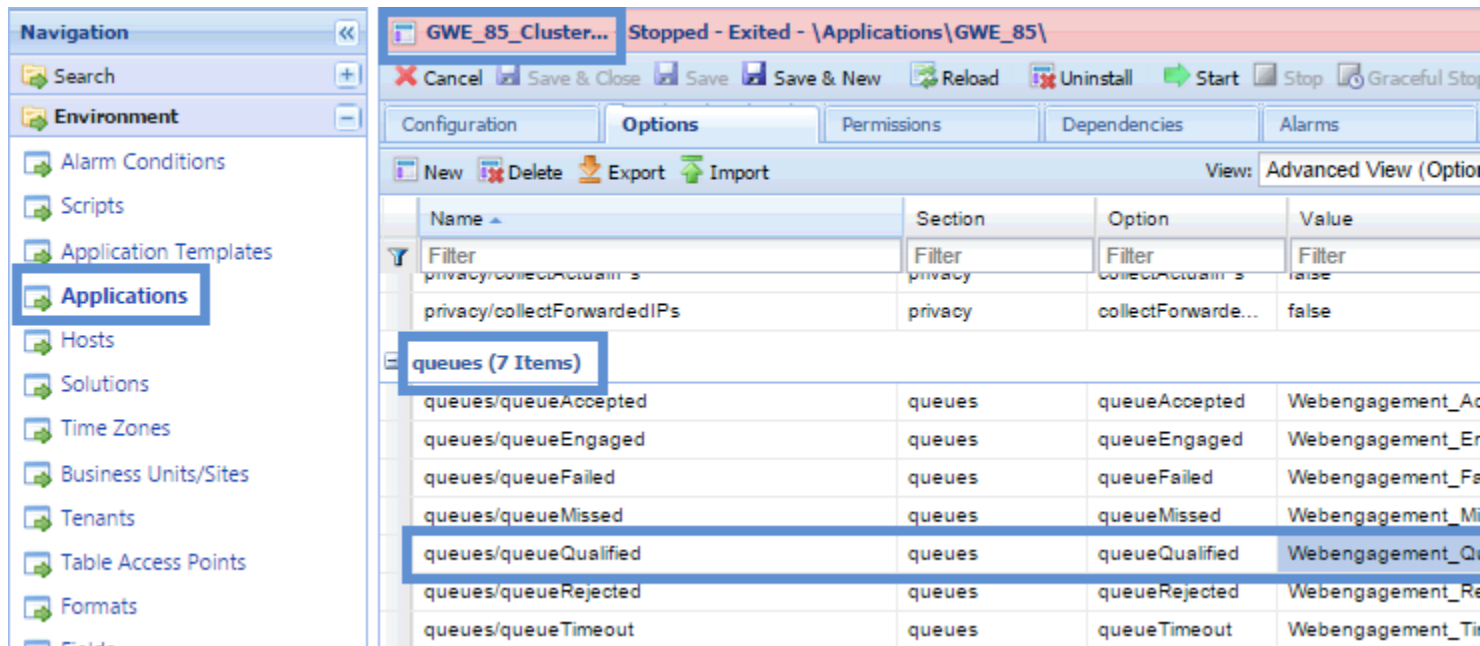
When you create your Web Engagement application, Genesys Web Engagement also creates default Engagement Logic and Chat Routing **SCXML strategies** in the **\apps\application\_name\resources\\_composer-projects\** folder. Orchestration Server (ORS) uses these strategies to decide whether and when to make a proactive offer and which channels to offer (chat or web callback).

The Engagement Logic strategy processes Genesys Web Engagement interactions, and consists of sub-workflows to handle: general processing, decision making, obtaining additional information from the Cassandra database through the REST API, and contacting the Web Engagement Server with instructions according to the engagement (or non-engagement) process.

You can modify the Engagement Logic SCXML by **importing the Composer project into Composer**. The project is located here: **\apps\application\_name\resources\\_composer-projects\WebEngagement\_EngagementLogic\**. Refer to the sections below for details about the Engagement Logic strategy and how it can be modified.

## Main Interaction Process and Workflow

When Genesys Web Engagement creates an engagement attempt, the Web Engagement Server creates an Open Media interaction of type **webengagement** and places it into the interaction queue specified by the **queueQualified** option. By default, this option is set to the **Webengagement\_Qualified** queue. Orchestration Server (ORS) monitors this queue and pulls the interaction to process it with the Engagement Logic strategy.



The screenshot displays the Genesys Web Engagement interface. On the left, the 'Navigation' pane shows 'Applications' selected. The main window shows the 'GWE\_85\_Cluster...' configuration. The 'Options' tab is active, displaying a table of configuration options. The 'queues (7 Items)' section is expanded, showing a list of queues. The 'queueQualified' option is highlighted, showing its value as 'Webengagement\_Qualified'.

Name	Section	Option	Value
Filter	Filter	Filter	Filter
privacy/collectActualIPs	privacy	collectActualIPs	false
privacy/collectForwardedIPs	privacy	collectForwardedIPs	false
<b>queues (7 Items)</b>			
queues/queueAccepted	queues	queueAccepted	Webengagement_Ac
queues/queueEngaged	queues	queueEngaged	Webengagement_Er
queues/queueFailed	queues	queueFailed	Webengagement_Fa
queues/queueMissed	queues	queueMissed	Webengagement_Mi
queues/queueQualified	queues	queueQualified	Webengagement_Qu
queues/queueRejected	queues	queueRejected	Webengagement_Re
queues/queueTimeout	queues	queueTimeout	Webengagement_Ti

The Interaction Queue

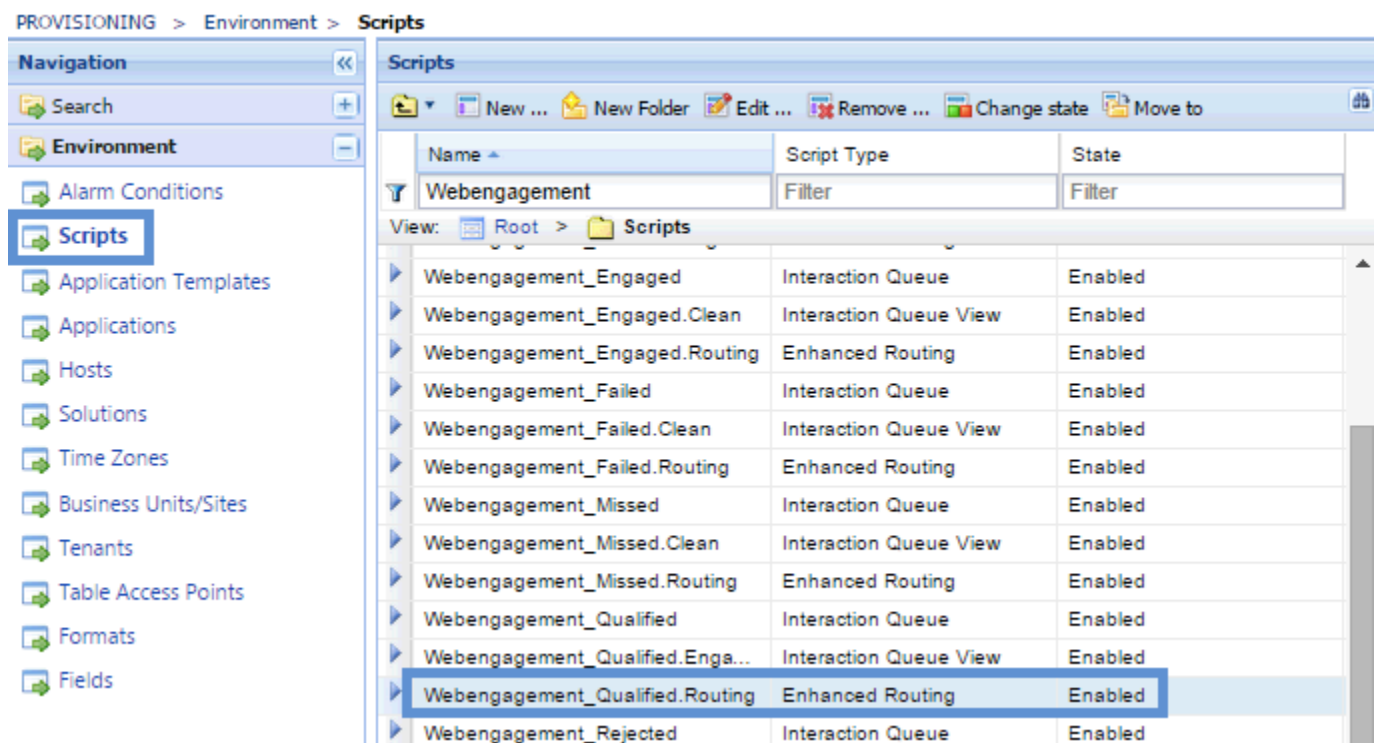
## Passing Parameters into the Engagement Logic Strategy

When Genesys Web Engagement creates an engagement attempt, the Web Engagement Server creates an Open Media interaction of type **webengagement** and places it into the Interaction Queue specified by the **queueQualified** option. By default, this option is set to the **Webengagement\_Qualified** queue. Orchestration Server (ORS) monitors this queue and pulls the interaction to process it with the Engagement Logic strategy.

Since ORS does not connect to the Web Engagement Server(s), certain parameters must be passed to the Engagement Logic strategy in order to provide ORS with the data it needs.

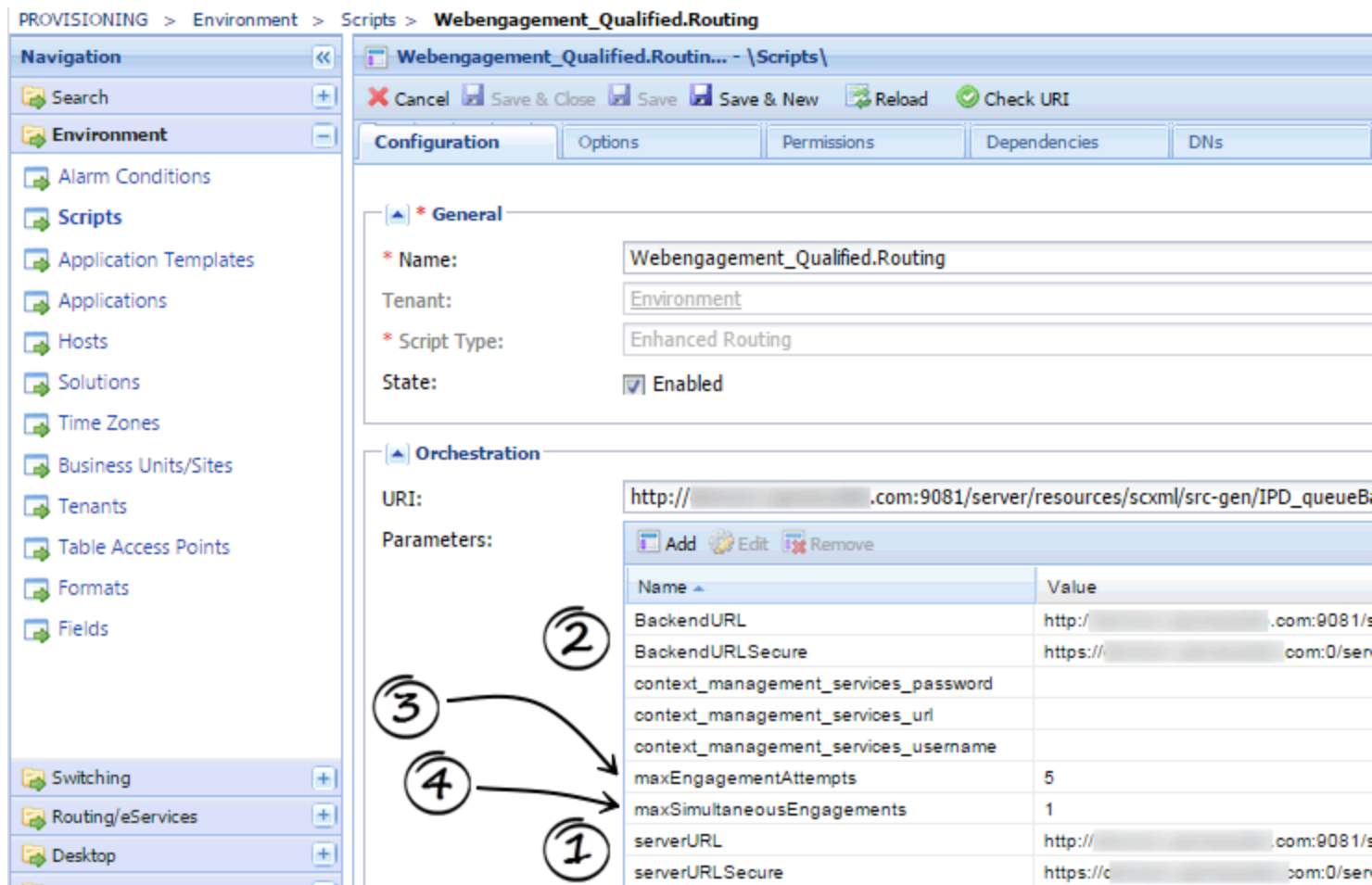
1. The address where the SCXML strategy is located. **Note:** The default Engagement Logic and Chat Routing strategies are located as resources under the Web Engagement Server. Provisioning automatically specifies this address in the related Configuration Server objects when GWE is installed. Since you can host strategies in other places, you can manually update the parameters in the related objects.
2. The address where the Web Engagement Server can be accessed (if a secure address is present, pass this as well). This information is used to issue REST requests to the GWE Cassandra database and to start or cancel the engagement procedure through the Web Engagement Server.

The parameters are passed to ORS through the Enhanced Routing script object **Webengagement\_Qualified.Routing** that is associated with the **Webengagement\_Qualified** Interaction Queue.



The Webengagement\_Qualified.Routing Script Object

There are several parameters specified by default, as shown in the following image.



The Webengagement\_Qualified.Routing Parameters

The first set of parameters, **(1) serverURL** and **serverURLSecure** correspond to the **(2) BackendURL** and **BackendURLSecure** parameters used in 8.1.2, which are still available, but are now deprecated. You can also set **(3)** the maximum number of engagement attempts and **(4)** the maximum number of simultaneous engagements.

In cases where you need a separate address for chat processing, use the **mediaServerURL** parameter. This parameter is similar to the **serverURL** parameter but is used to specify a separate URL to be used only for chat processing. This can be useful in situations where:

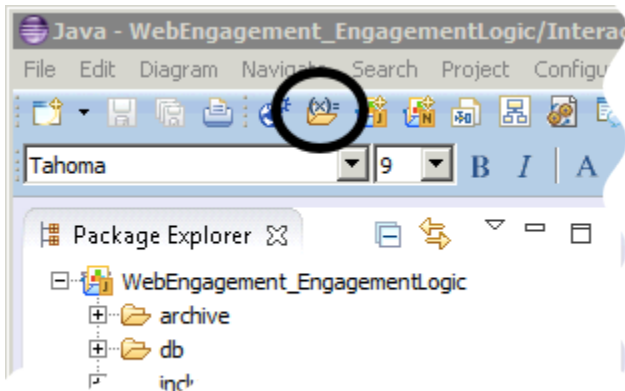
- Event traffic uses a non-secure server (as specified by the **serverURL** parameter), but you need a secure connection for your chat traffic (in which case **mediaServerURL** will specify an HTTPS endpoint)
- Event traffic is processed on one port, but chat traffic needs to be processed on a second port on the same host

The Engagement Logic strategy has two interaction processes:

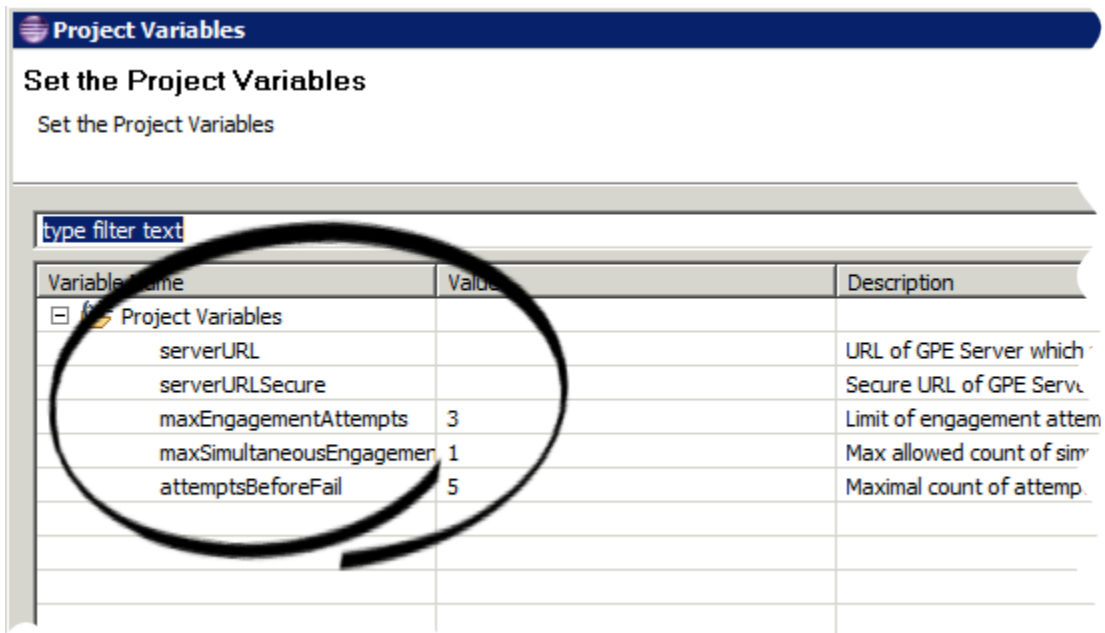
- **clean.ixnprocess** — This process is explained in [Cleaning Interaction Process](#)
- **queueBased.ixnprocess** — This process features the major logic for the strategy.

In this section, we will consider the second one.

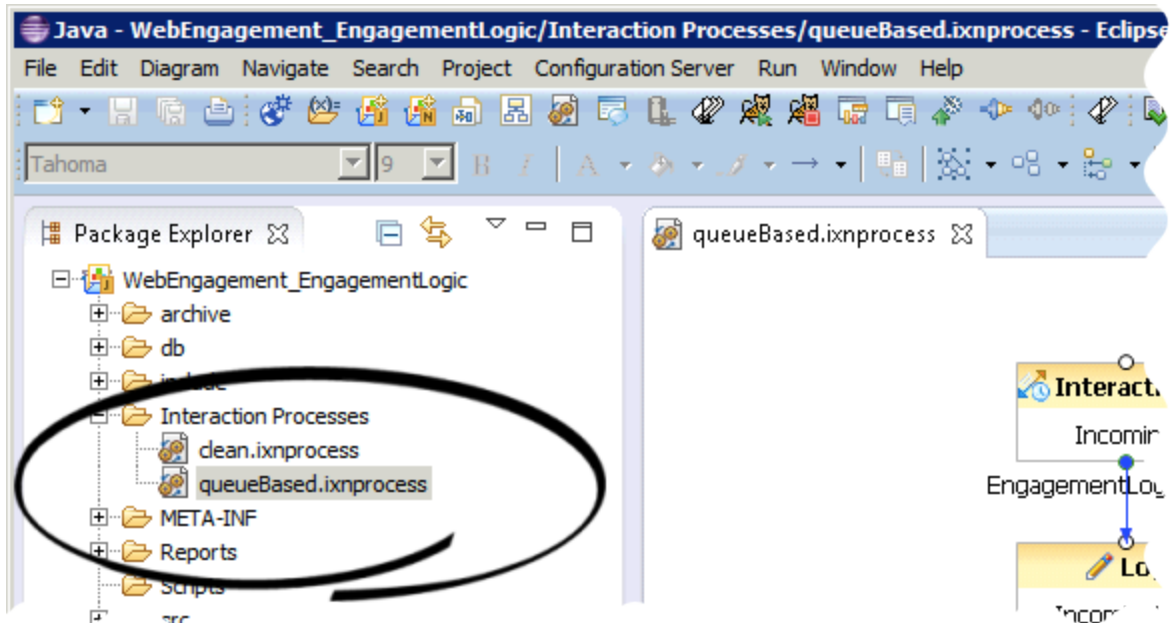
To access the above-mentioned parameters from within Composer, use the Composer **Access Project Variables** button shown in the following image. **Note:** In order to access Project Variables, your current tab in Composer must display Interaction Process (not Workflow).



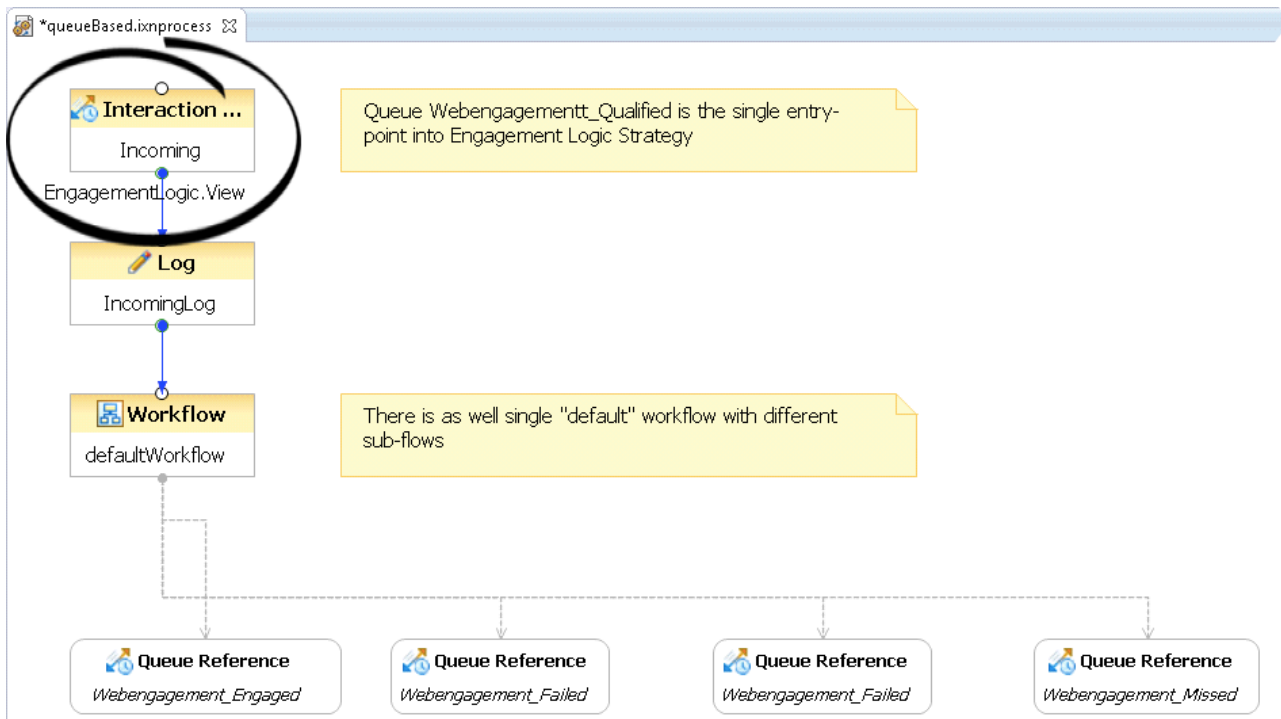
This button opens a window containing the variables we are currently interested in:



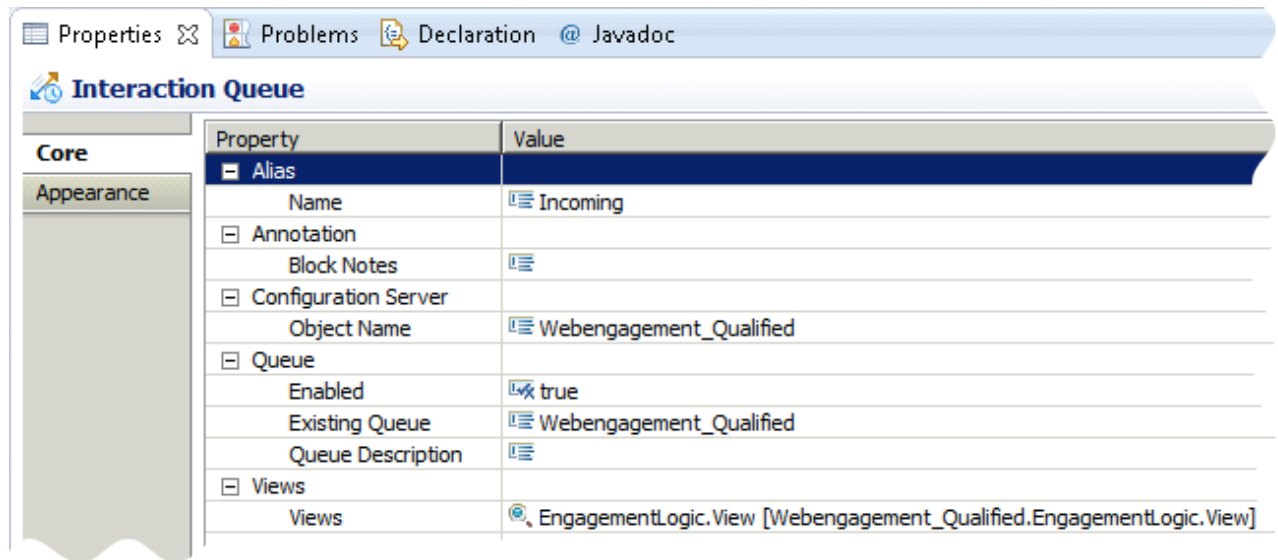
Now let's take a look at **queueBased.ixnprocess**. Select it in the Package Explorer:



The entry point Interaction Queue (**Webengagement\_Qualified**) is shown here:



And its properties are here:



After the interaction is taken into processing, it is placed into a set of workflows for processing. All workflows have notes related to specific blocks, however, this document highlights the most important items.

## Preventing Interaction Termination into Sub-flows

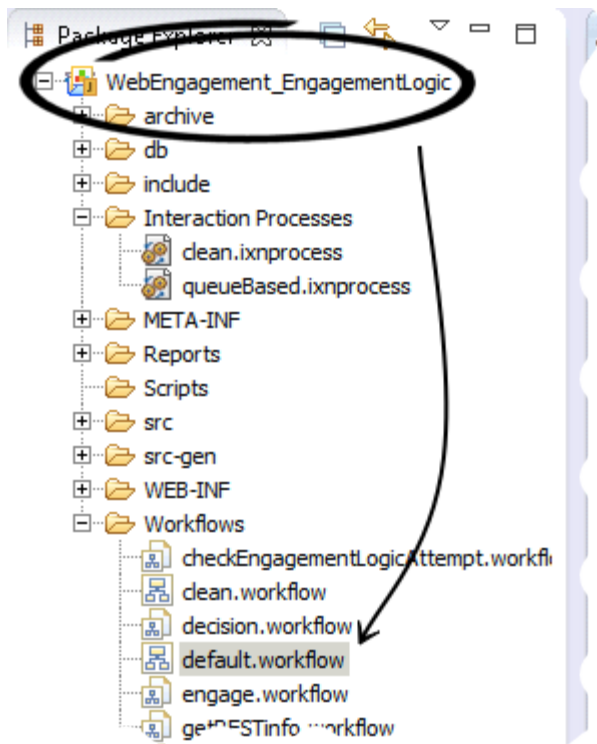
For all workflows, you must make sure that the workflow is configured to **not** terminate the interaction upon exiting. If this step is not followed, the entire interaction process will not be able to finish due to termination of the interaction in one of the sub-flows.

**Note:** Out-of-the-box Engagement Logic strategies already have the correct specified value (0) for the **system.TerminateIxnOnExit** variable.

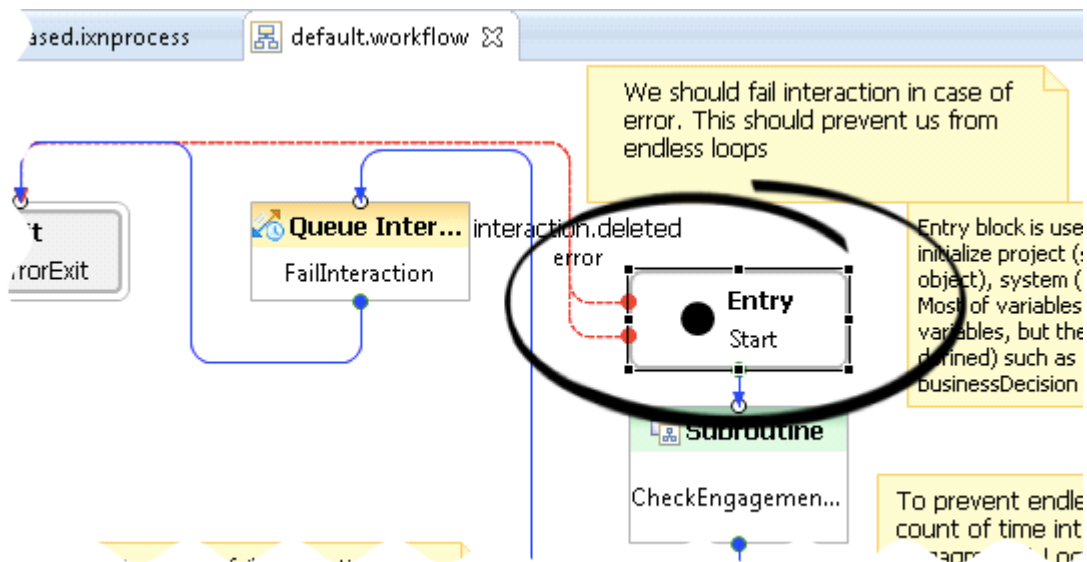
You must perform the following steps to turn off the termination of the interaction at the end of the sub-flow:

1. Open the workflow diagram in Composer (note that in the images, it is shown as **default.workflow**).

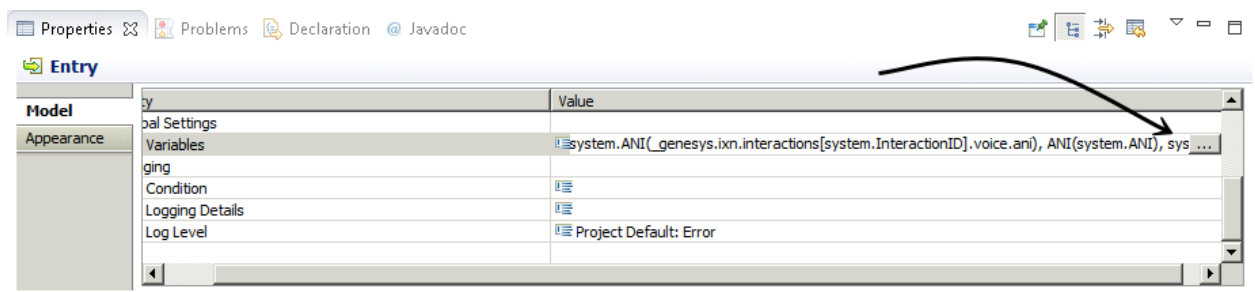




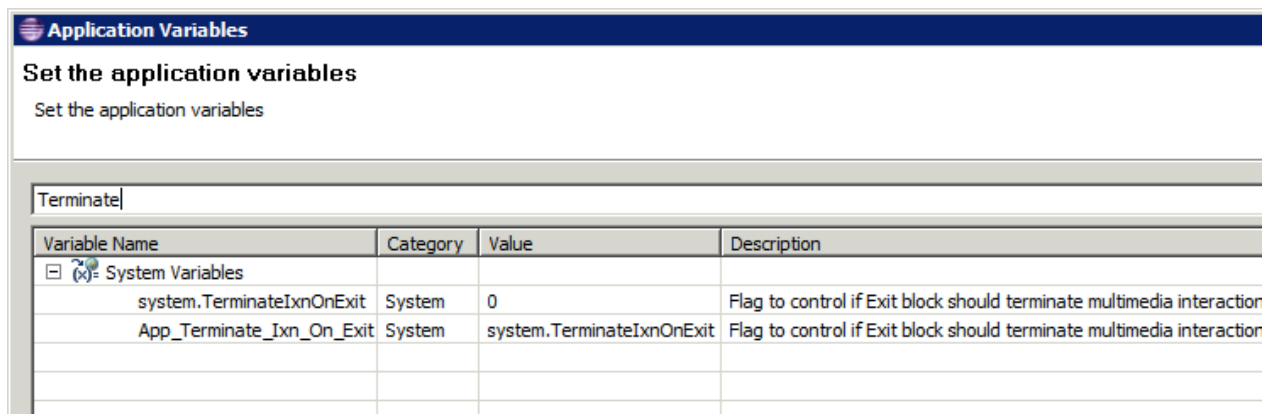
2. Select the **Entry** block.



3. Open the properties of this block and access the **Global Settings > Variables**.



4. Locate the variable **system.TerminateIxnOnExit**. In this case, we have filtered the variables so only those that contain the string Terminate are showing. Set the value to 0.



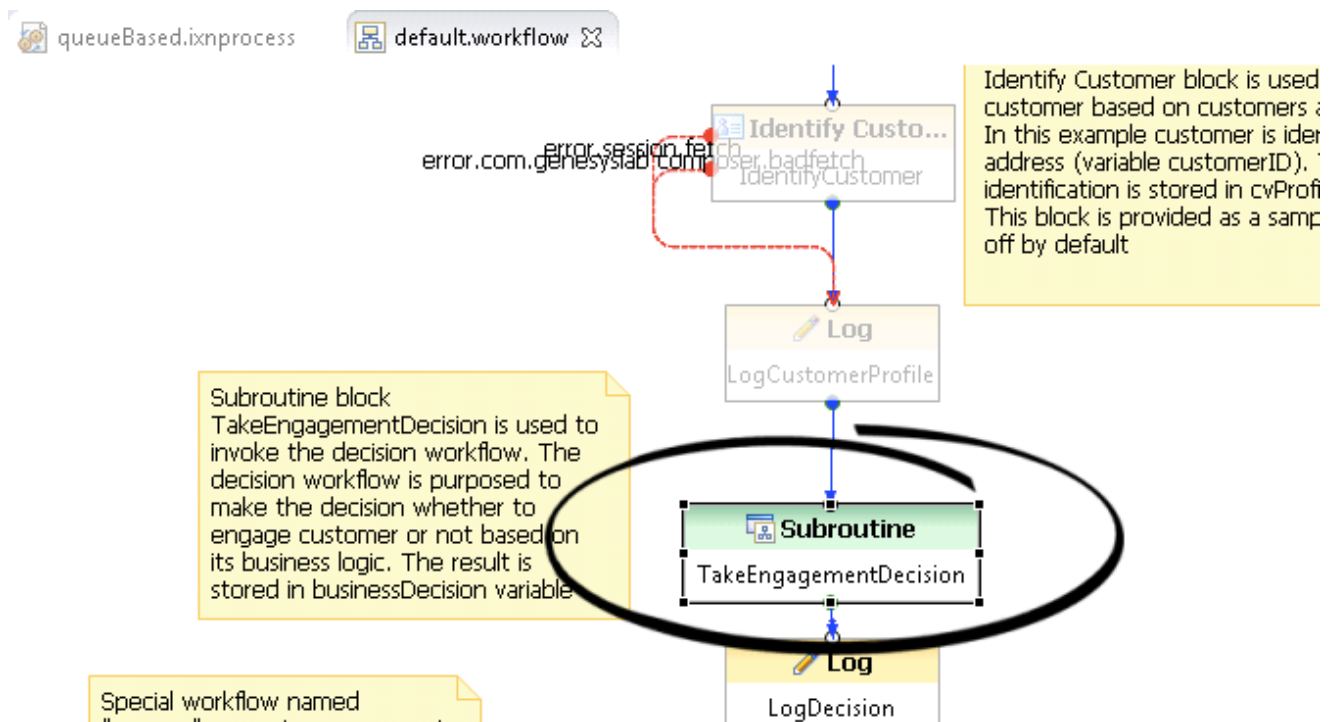
## Accessing User Data from the webengagement Interaction and Passing it into Sub-flows

One of the most important features of the Engagement Logic is its ability to access User Data from **webengagement** interactions. This data is populated by the Web Engagement Server and includes, among other things, information provided by a pacing algorithm.

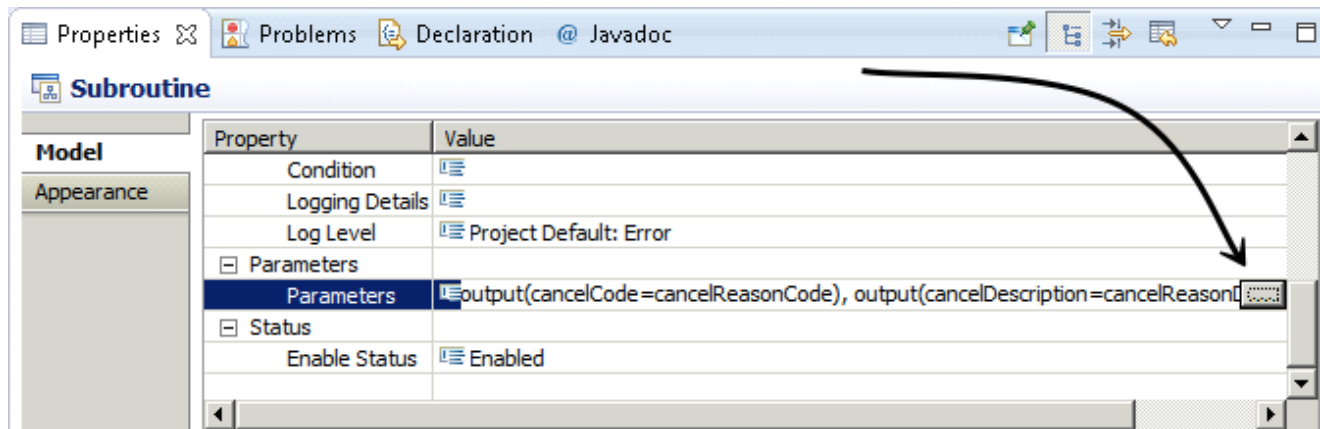
In previous releases of Genesys Web Engagement, this information was only available in JSON format and needed to be parsed by the strategy in order to be easily used. If you are using a strategy from release 8.1.2, you can still use access JSON data by specifying **8.1.2-compatible user data**.

After data is parsed and assigned to variables, it can be propagated to sub-flows and used there. Sub-flows are also able to pass output data in a backward direction.

In the following example, we show the **TakeEngagementDecision** subroutine:



Then, you can see its parameters, which are displayed in a Composer window below the workflow diagram:



Let's consider the parameters we are passing into **decision.workflow**, including **event\_chatChannelCapacity** and **event\_webcallbackChannelCapacity**, as well as the parameters we are receiving from the workflow, including **cancelCode**, **cancelDescription** and **decision**:

Parameters				
Input Output Parameter Sync				
Name	Type	Variable	Description	
cancelCode	output	cancelReasonCode	Code for cancelling engagement attempt	
cancelDescription	output	cancelReasonDescription	Description for engagement attempt cancelling	
decision	output	businessDecision		
event_chatChannelCapacity	input	event_chatChannelCapacity	Results of pacing algo on chat queues. Count of ch	
event_defaultChannel	input	event_defaultChannel	Primary engagement channel	
event_engagement_attempts	input	event_engagement_attempts	Total amount of engagement attempts made for b	
event_engagements in progress	input	event_engagements_in_progress	Count of currently processing engagements for this	
event_webcallbackChannelCapacity	input	event_webcallbackChannelCapacity	Results of pacing algo on webcallback queues. Cr	

## Attached Data in Web Engagement 8.5

As specified in the following tables, Genesys Web Engagement 8.5 supports key-value pair-based user data that is useable by Genesys Reporting, in addition to making 8.1.2-compatible data available.

### 8.1.2-Compatible Data

Previous releases of Genesys Web Engagement provided JSON-based user data. If you would like the Web Engagement Server to continue to attach 8.1.2-style data, set the **attach812StyleUserData** option in the **[userData]** section to **true**, which provides access to the following two fields:

Key	Type	Description
ScheduledAt	UTC-based timestamp of "Now"	This parameter is used by Orchestration to pull interaction into cleaning strategies if for some reason it was not not processed by Engagement Logic strategy
jsonEvent	String, which contains JSON object	GWE 8.1.2-compatible field. Will be attached <b>only</b> if the <b>attach812StyleUserData</b> option is set to <b>true</b> .

### Mandatory Actionable Event Fields

Key	Contents	Description
HotLead_eventID	UUID	eventID obtained from Actionable event

Key	Contents	Description
HotLead_eventName	String	Actionable event name.
HotLead_visitID	UUID	visitID obtained from Actionable event
HotLead_globalVisitID	UUID	globalVisitID obtained from Actionable event
HotLead_pageID	String	browserPageID obtained from Actionable event
HotLead_url	String	url obtained from Actionable event
HotLead_languageCode	String	languageCode obtained from Actionable event
HotLead_timestamp	long	timestamp obtained from Actionable event
HotLead_category	String	category obtained from Actionable event
HotLead_rule	String	rule obtained from Actionable event

### Web Engagement Server Data

Key	Type	Description
HotLead_engagementID	UUID	ID of Engagement Profile associated with <b>webengagement</b> interaction
HotLead_engagementAttempts	int	Count of engagement attempts (accepted and rejected) that happened already on this visit
HotLead_engagementsInProgress	int	Count of currently active engagement attempts
pacing_chatCapacity	int	Actual capacity of chat channel, predicted by pacing
pacing_webcallbackCapacity	int	Actual capacity of webcallback channel, predicted by pacing
pacing	String	JSON object, which includes detailed group-based pacing information

### Optional Fields

Key	Type	Description
HotLead_<customFieldName>	String	Field with name <customFieldName>, obtained from data object of <b>actionable</b> event. List of fields should be specified in the option <b>eventType.ACTIONABLE</b>

Key	Type	Description
		<p>(<b>[userData]</b> section)</p> <p>For example:</p> <p>1) Actionable event has data fields "myCustomField" and "myAnotherCustomField":</p> <pre>"data": {"myCustomField": "SomeValue", "myAnotherCustomField": "SomeAnotherValue"}</pre> <p>2) eventType.ACTIONABLE has value "myCustomField"</p> <p>GWE 8.5 will attach to the User Data only the following pair:</p> <pre>"HotLead_myCustomField": "SomeValue"</pre>
VisitStarted_<customFieldName>	String	<p>Field with name &lt;customFieldName&gt;, obtained from data object of <b>VisitStarted</b> event.</p> <p>List of fields should be specified in the option <b>eventName.VisitStarted</b> (<b>[userData]</b> section)</p> <p>The following keys are available:</p> <pre>"userAgent", "screenResolution", "language", "timezoneOffset"</pre> <p>In OOB template option <b>eventName.VisitStarted</b> has value <b>"timezoneOffset"</b></p> <p>Correspondingly, GWE 8.5 will attach to the User Data the following pair:</p> <pre>"VisitStarted_timezoneOffset": 25200000 (value will depend on visitor's timezone)</pre>
SignIn_<customFieldName>	String	<p>Field with name &lt;customFieldName&gt;, obtained from data object of <b>SignIn</b> event.</p> <p>List of fields should be specified in the option <b>eventName.SignIn</b> (<b>[userData]</b> section)</p> <p>List of available keys depends on customer's workflow</p>
UserInfo_<customFieldName>	String	<p>Field with name &lt;customFieldName&gt;, obtained from data object of <b>UserInfo</b> event.</p> <p>List of fields should be specified in the option <b>eventName.UserInfo</b> (<b>[userData]</b> section)</p>

Key	Type	Description
		section) List of available keys depends on customer's workflow

## Engagement Policy (Decision Workflow)

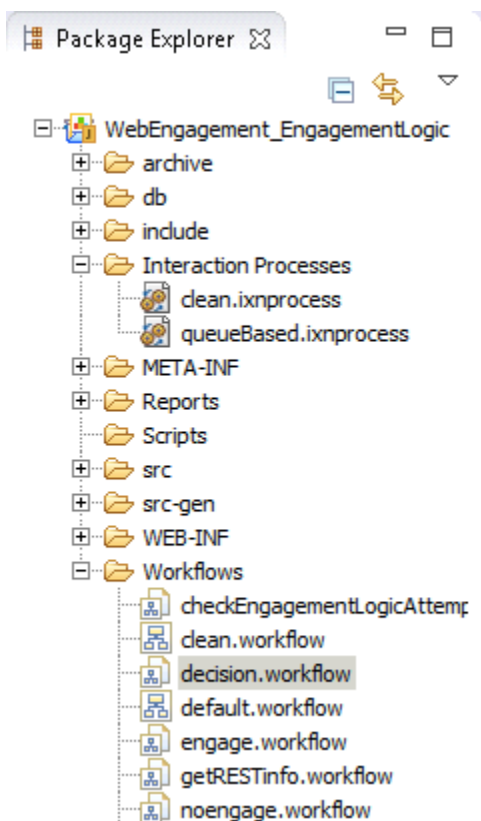
*Engagement policy* is the other name of decision workflow.

Consider the most important points provided by the out-of-the box strategy:

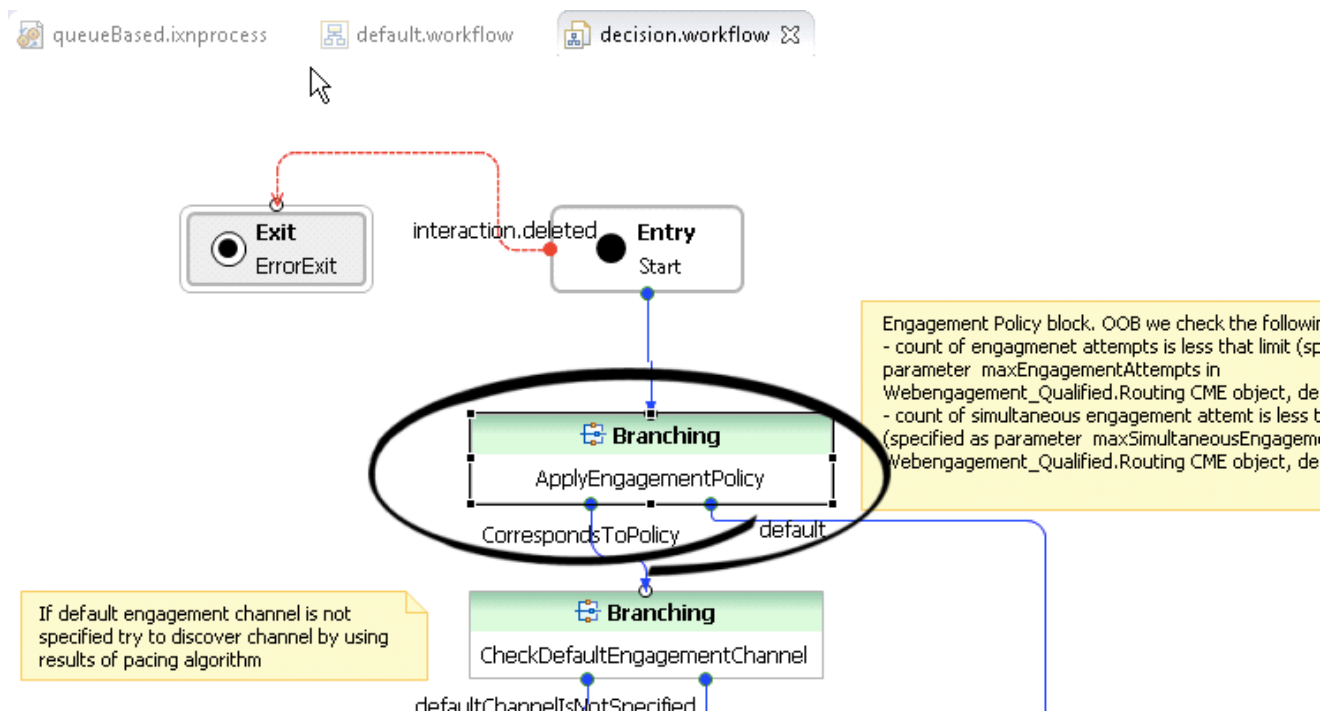
### Count of Engagement Attempts

Check the count of engagement attempts already proposed to the current visitor.

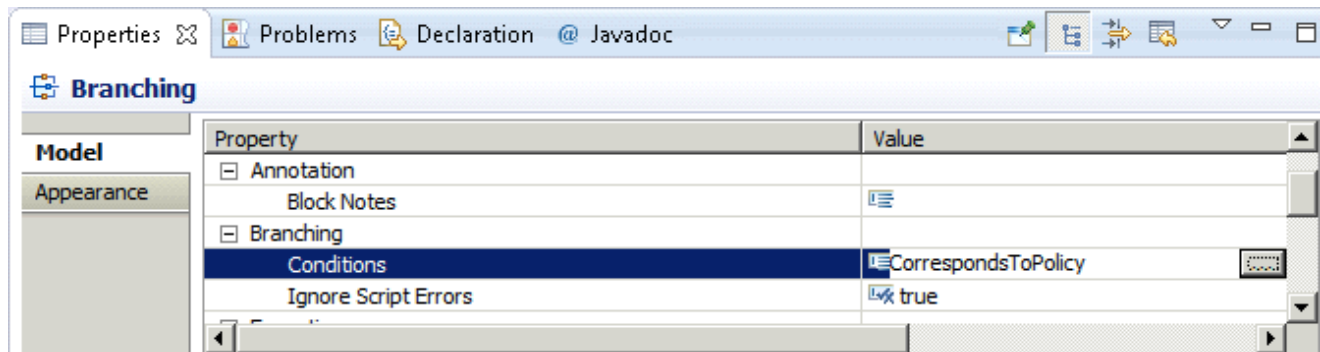
To see where this check is executed open **decision.workflow**:



Looking at the workflow, you can select the **ApplyEngagementPolicy** block:



In the properties for this block, select **Branching > Conditions** and open **CorrespondsToPolicy**:



**CorrespondsToPolicy** is an expression that uses application parameters from the **Webengagement\_Qualified.Routing** script object to determine how many engagement attempts should be proposed for a particular visitor. **Note:** Engagement attempts in the current visit that were closed with a timeout disposition code will not be taken into account, as there is no guarantee whether the visitor has seen them. For example, the invitation may appear on a non-active browser tab or window.



The screenshot shows a software interface with two main panels. The top panel, titled "Branching Conditions", contains a table with three columns: "Name", "Expression", and "Post Action". The first row in the table has the name "CorrespondsToPolicy" and the expression "Number(event\_engagement\_attempts) < Number(\_data.maxEngagementAttempts)". A mouse cursor is pointing at the "Branching Node settings" text above the table. The bottom panel, titled "Expression Builder", is for editing the expression for "CorrespondsToPolicy". It includes instructions: "Build an expression in the Expression field by selecting the operator(s) and data element(s) from the categories and subcategory. You may also type an expression directly into the Expression field." Below the instructions is a toolbar with icons for Copy, Cut, Paste, Delete, Undo, Redo, and Validate. The "Expression field" contains two lines of text: "1 Number(event\_engagement\_attempts) < Number(\_data.maxEngagementAttempts)" and "2 && Number(event\_engagements\_in\_progress) < Number(\_data.maxSimultaneousEngagements)".

**Branching Conditions**

Name	Expression	Post Action
CorrespondsToPolicy	Number(event_engagement_attempts) < Number(_data.maxEngagementAttempts)	...

**Expression Builder**

**Expression Builder: CorrespondsToPolicy**

Build an expression in the Expression field by selecting the operator(s) and data element(s) from the categories and subcategory. You may also type an expression directly into the Expression field.

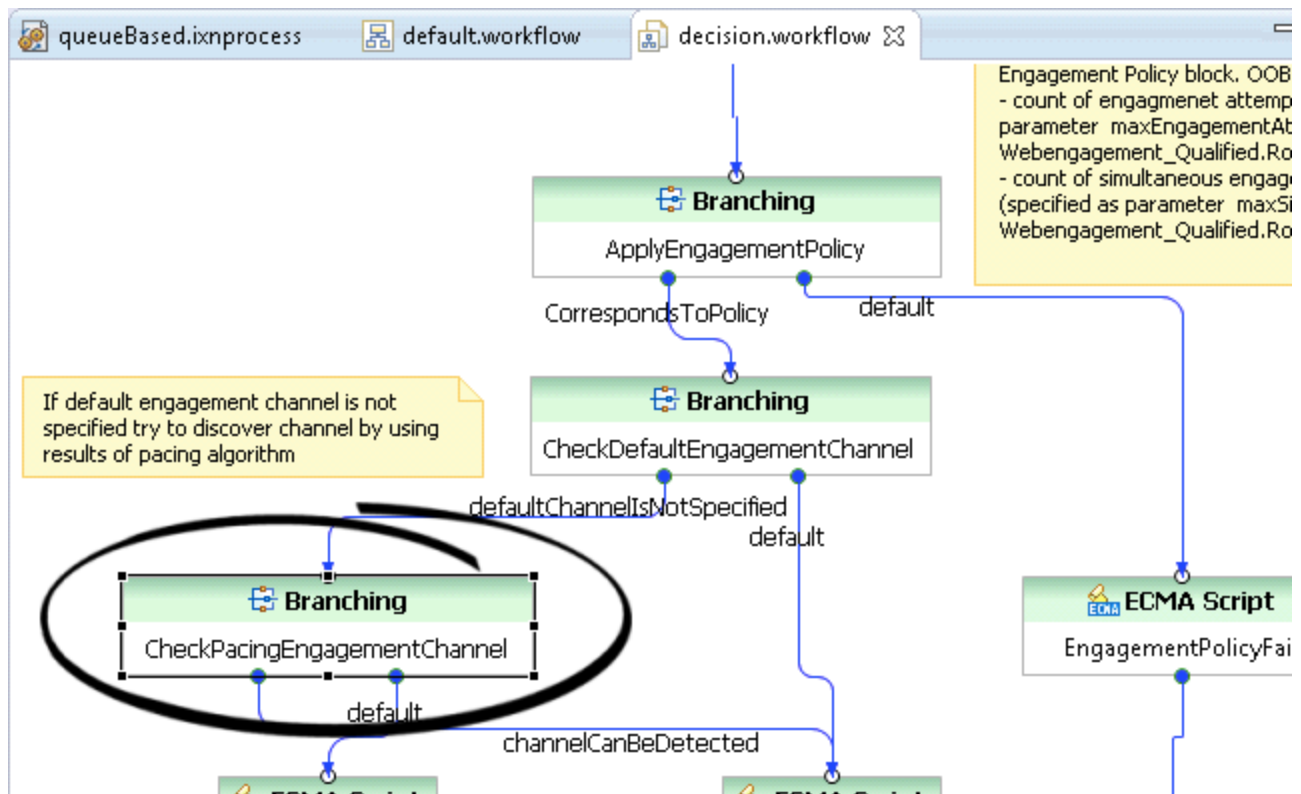
Copy Cut Paste Delete Undo Redo Validate

Expression field

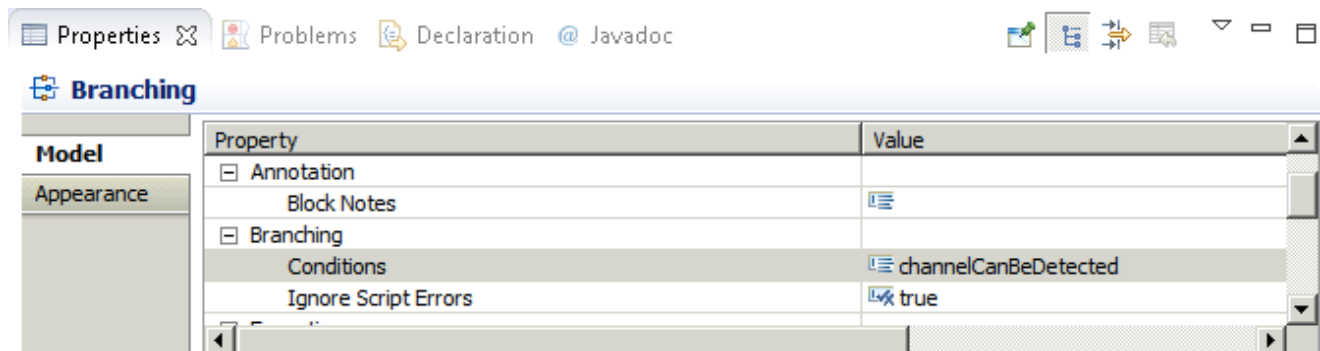
```
1 Number(event_engagement_attempts) < Number(_data.maxEngagementAttempts)
2 && Number(event_engagements_in_progress) < Number(_data.maxSimultaneousEngagements)
```

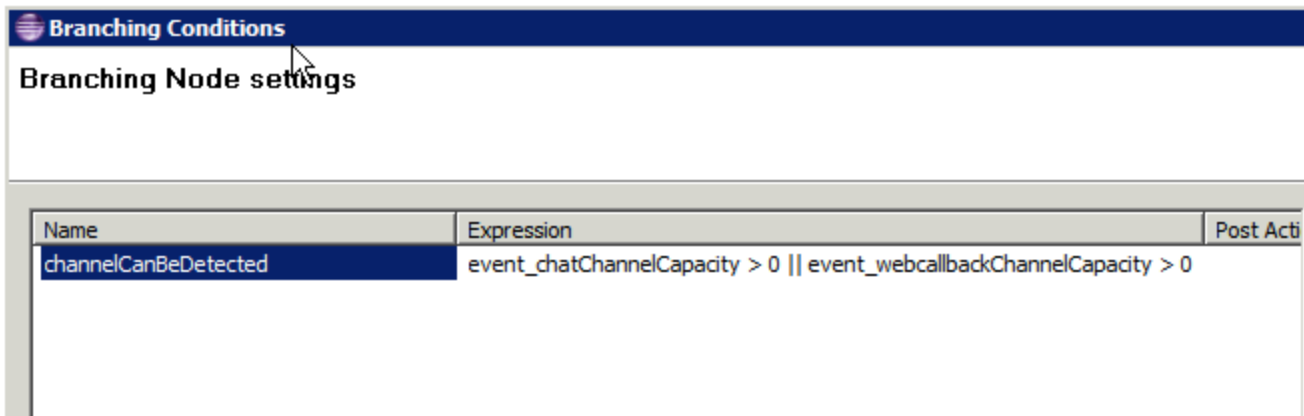
## Pacing Information

Check pacing information. This is executed inside of the **CheckPacingEngagementChannel** block:



**Note:** The out-of-the-box strategy operates only on general information obtained from the pacing algorithm: in particular, the **event\_chatChannelCapacity** and **event\_callbackChannelCapacity** variables, which are passed from **default.workflow**, contain the accumulated (by channel) count of interactions that can be triggered at a particular moment. You can also pass more detailed information provided by the pacing algorithm into the decision workflow and build a more sophisticated decision maker. The images below show the general idea: do **not** engage the visitor if the count of available "interactions to produce" is 0 for both channels:





Name	Expression	Post Acti
channelCanBeDetected	event_chatChannelCapacity > 0    event_webcallbackChannelCapacity > 0	

## Obtaining Data from the GWE Cassandra Database through REST Requests

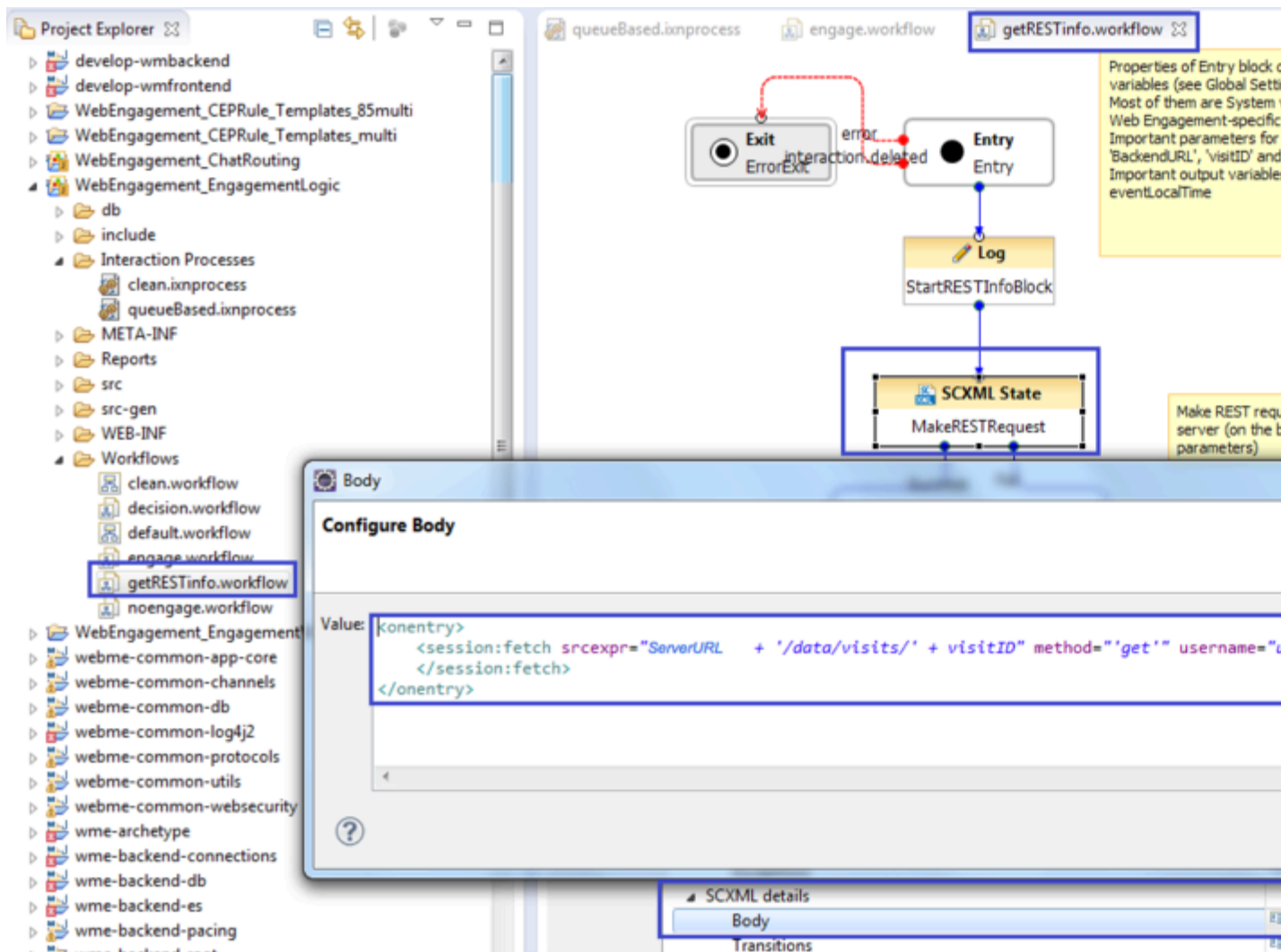
### Requesting data from Web Engagement Server through the REST

During the decision making process, it might be useful to access data from the Web Engagement Cassandra database. For example, to check additional parameters that are collected there.

The out-of-the-box Engagement Strategy provides an example of accessing the Cassandra database in order to get the **TimezoneOffset** of the visitor's browser, and correspondingly modify the greetings *good evening*, *good morning*, and so on. **Note:** the **SCXML State** block that is used to demonstrate these concepts is disabled by default in Web Engagement 8.5. It has only been retained as a sample, because the GWE 8.5 server provides related information as a part of the User Data in the **webengagement** open media interaction.

Consider how Engagement Strategy does this task.

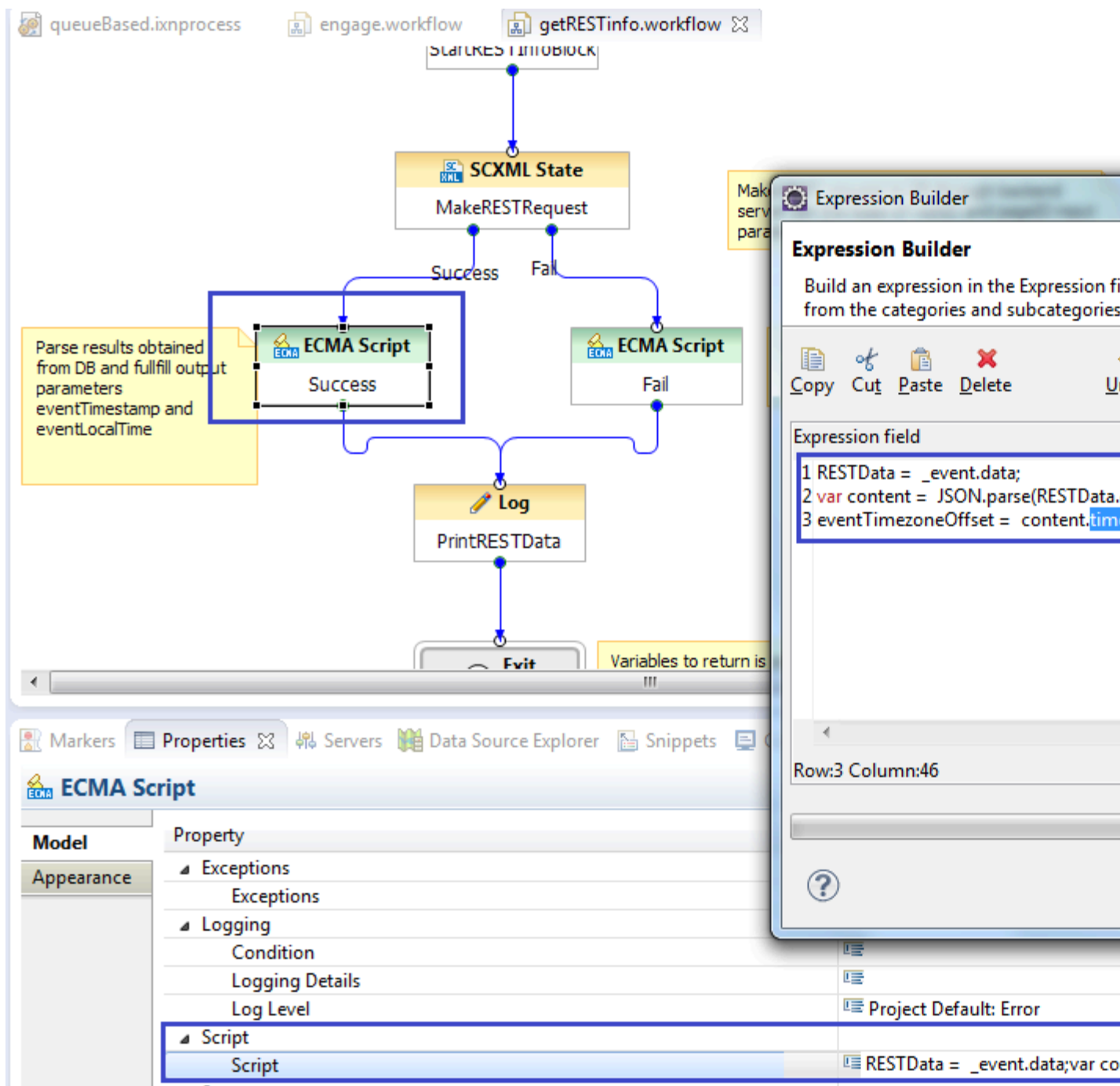
1. Use the **SCXML State** block in order to make the REST request with specified parameters.



Use the State block to make REST requests

**Note:** The **ServerURL** and **visitID** parameters are passed from the parent workflow into this sub-flow.

2. Parse response to the REST request. After the response is successfully obtained, it should be parsed in order to extract required data. In this example, the **timezoneOffset** parameter is obtained from the data of the VisitStarted event:



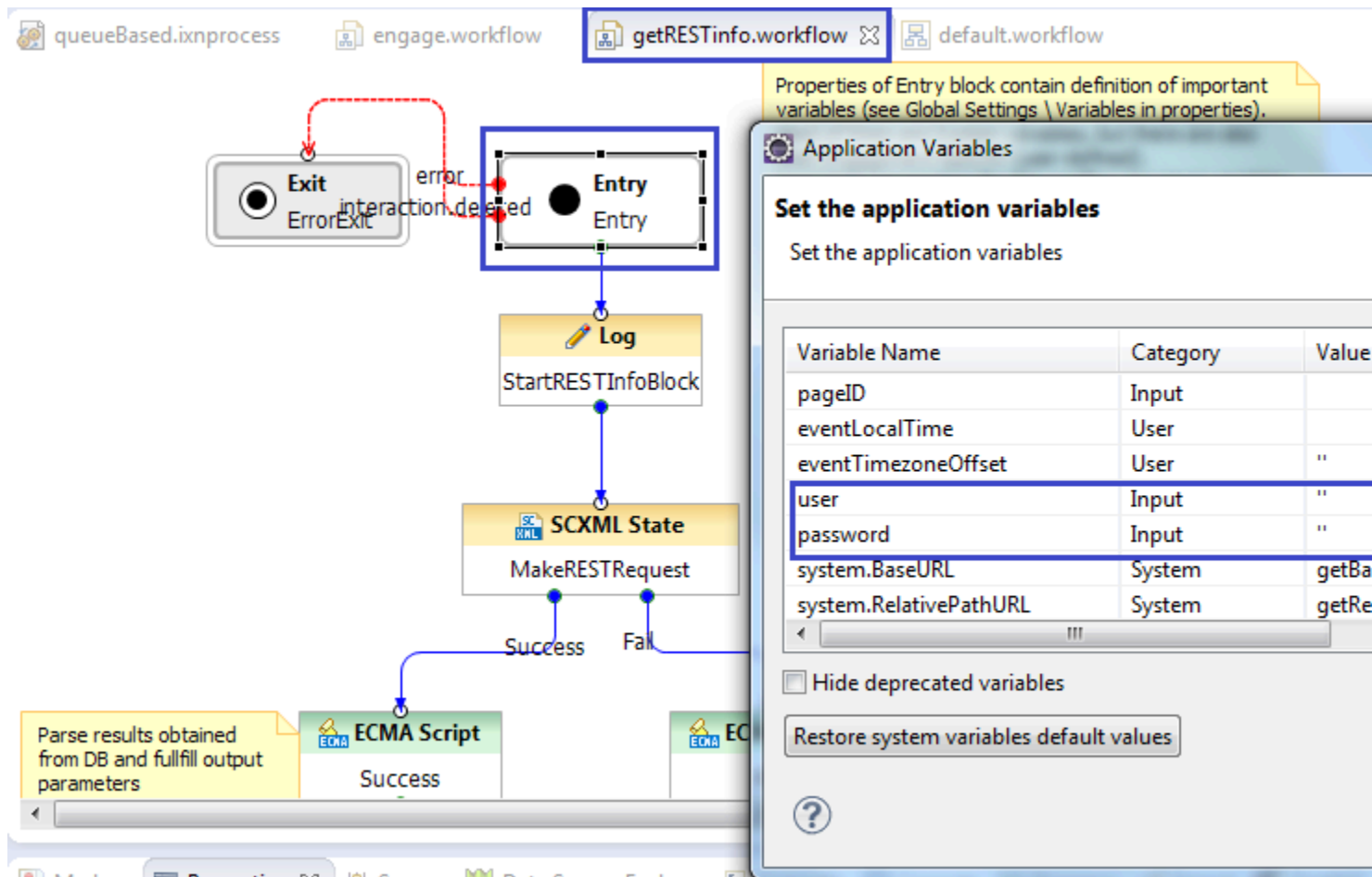
Parse the response to the REST request

**Note:** Alternatively, instead of the **SCXML State** block, you can use a **Web Request** or **Web Service** block. In this case, Composer requires this logic to be hosted as a web application, which means the entire Composer project must be hosted outside of the Web Engagement application. With Composer, you can export the project as a web application in WAR format. This approach is not used in out-of-the-box strategies.

## Configure Authentication in the out-of-the-box SCXML Strategy

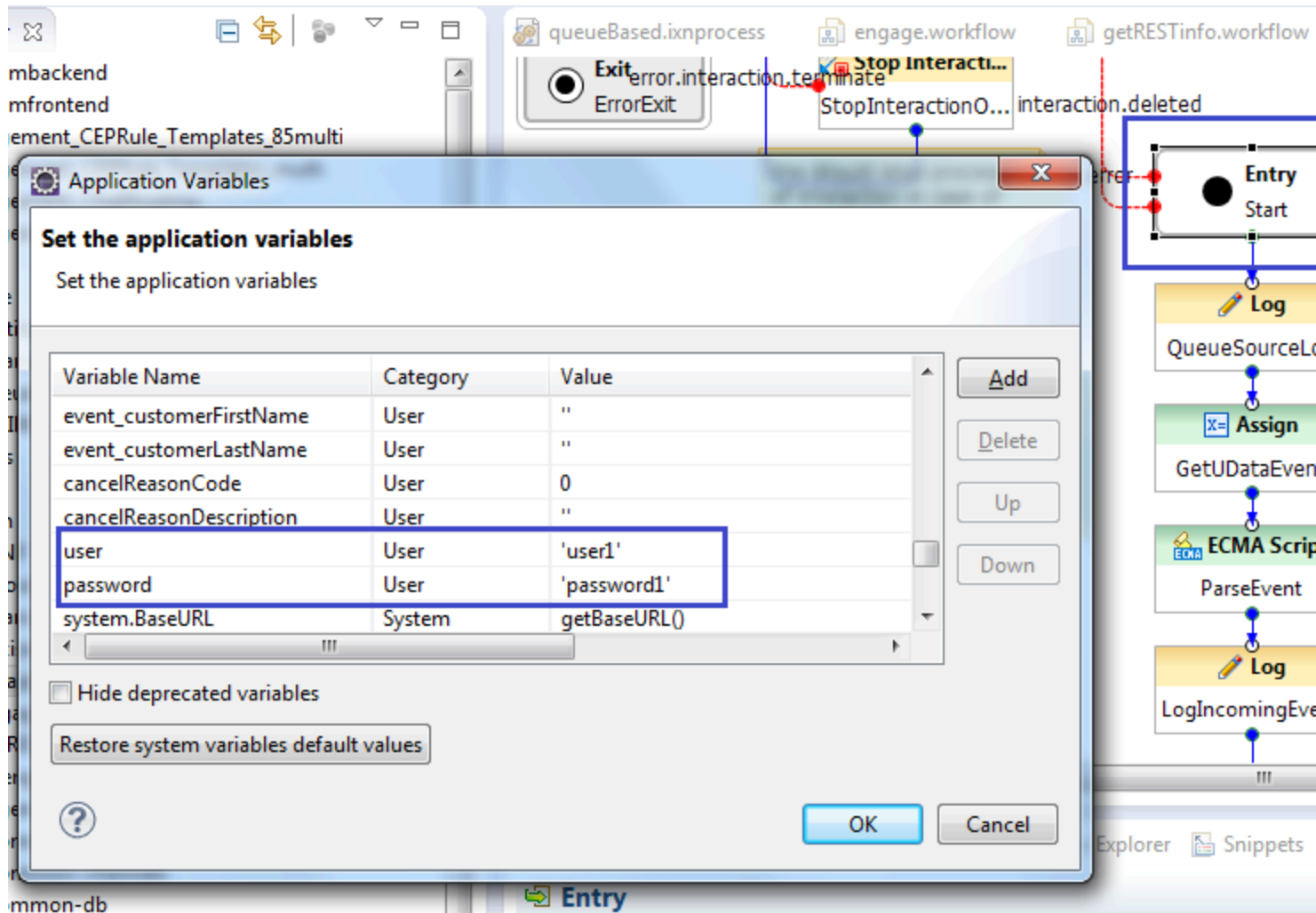
Genesys Web Engagement 8.1.2 and higher provides basic access authentication on the base of providing username/password pairs.

Username and password parameters, used in the **SCXML State** block, are passed into **getRESTInfo** workflow from the parent workflow:



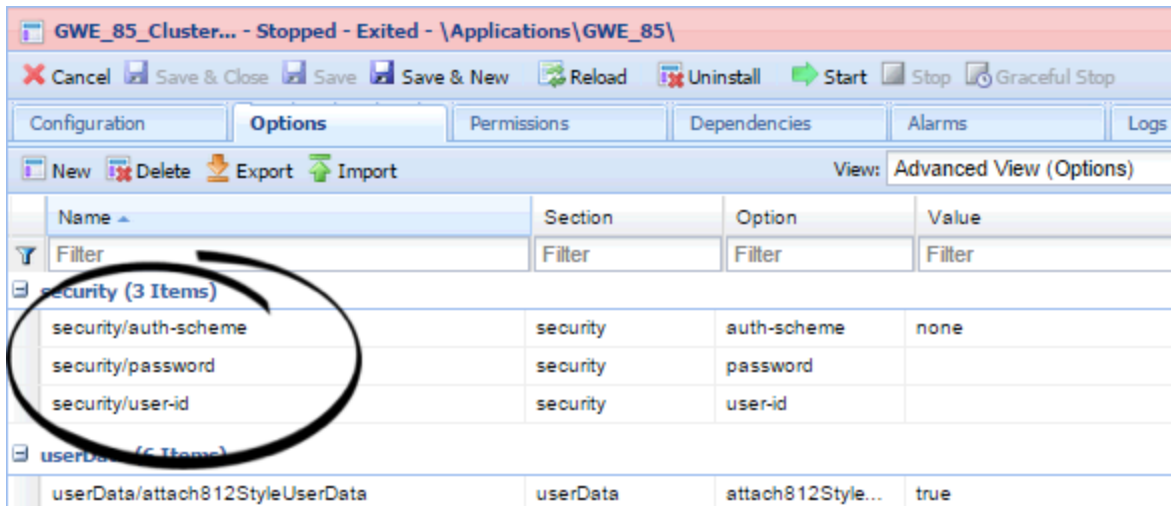
The username and password application variables in **getRESTInfo.workflow**.

The username and password parameters are specified in variables of the **Entry** block in **default.workflow**:



The username and password application variables in the **default.workflow**.

You must check that these credentials are compliant with the credentials specified in the security section of the Web Engagement Cluster or Web Engagement Server options:



The username and password are specified in the security section

See [Configuring Authentication](#) for details.

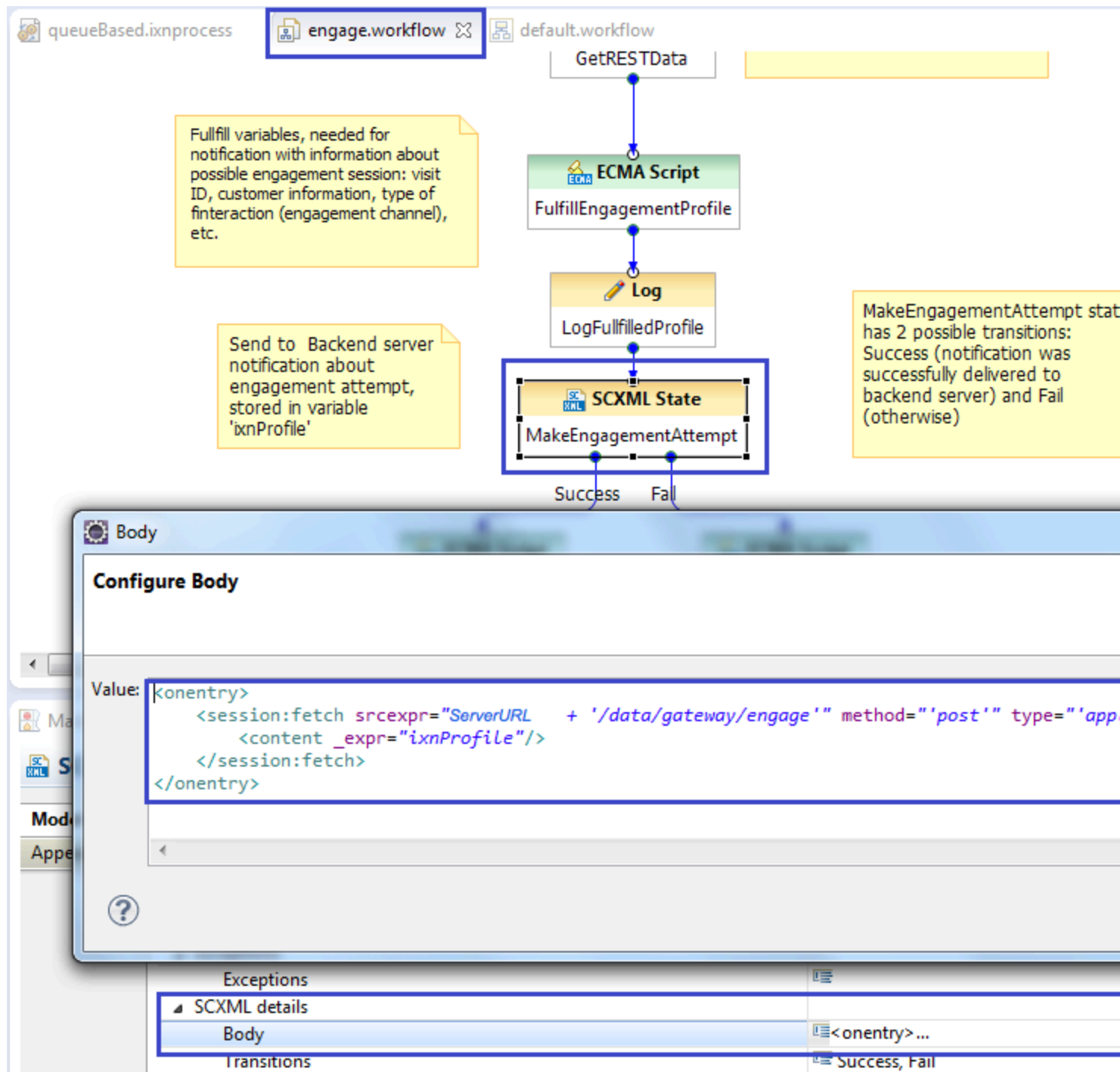
## Start Engagement as a Result of the Engagement Logic Strategy

### Sending the "start engage" Request to the Web Engagement Server

The special workflow **engage.workflow** notifies the Web Engagement Server about the start engage command.

Notification of the Web Engagement Server is executed through the **REST request** using the **SCXML State** block:





The REST request notifies the Web Engagement Server

**Note:** Authentication aspects shown here are the same in **getRESTInfo.workflow**.

## Fulfilling IxnProfile for "start engage" Request

Take note of the **IxnProfile** structure, which is passed in REST request to the Web Engagement Server. This structure is fulfilled in the **ECMA Script** block called **FulfillEngagementProfile**.

The following object is sent to the Browser:

```
ixnProfile = {  
  'data': data  
}
```

Consider the structure of the data object:

```
var data = {  
  'profile': engageProfile,  
  'notification': notification_message  
}
```

As you can see, there are two fields:

- profile — represented by the variable **engagementProfile**.
  - The content of this variable will be considered below. You can change the content of this variable if the SCXML strategy worked in the area of visitor identification.
  - It is not recommended to change it if related items are not a part of your modified strategy.
- notification — represented by the variable **notification\_message**.

The structure of the notification message is described in [Chat Invitation Message](#) and [Callback Invitation Message](#).

### Structure of the engagementProfile variable

Field name	Field contents	Description
engagementID	UUID	Auto-generated field which identifies exactly one engagement attempt
visitID	UUID	visitID of current session (obtained from HotLeadActionableEvent)
globalVisitID	UUID	globalVisitID of current session (obtained from HotLeadActionableEvent)
webengagementInteractionID	String	ID of "webengagement" OM interaction associated with this Engagement Profile
pageID	String	PageID identified specific tab in browser (obtained from HotLeadActionableEvent)
category	String	List of categories specified in HotLeadActionableEvent

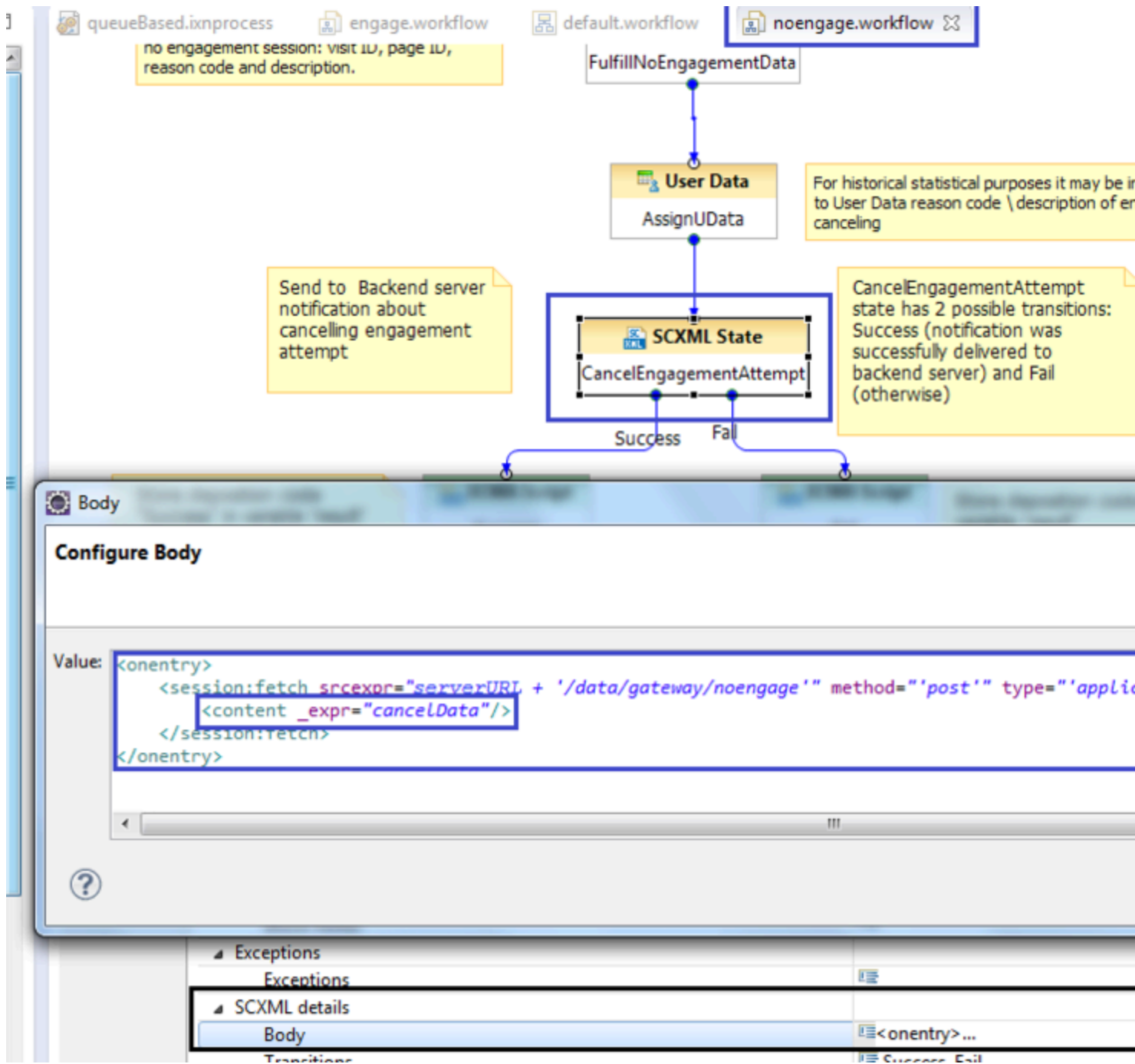
Field name	Field contents	Description
rule	String	Name of rule, which triggered this HotLeadActionableEvent
userID	String	String, which allows to identify authorized and recognized visitors For anonymous users it will be null
userState	String	State of current visit: Anonymous, Recognized or Authorized
firstName	String	First name of non-anonymous user
lastName	String	Last name of non-anonymous user
userData	String	JSON string which represents User Data, collected on webengagement OM interaction before submit and in the Engagement Logic strategy

You can change the fields **firstName**, **lastName** and **state** in the case of additional work being executed in the visitor identification area. In this case, the Web Engagement Server applies passed values to the identity record of the specified **engagementId**.

## Cancelling Engagement as a Result of the Engagement Logic Strategy

### Sending "cancel engagement" to Web Engagement Server

This is similar to sending **start engage**, request **cancel engagement**; it also uses the **SCXML State** block to trigger a **REST request** to the Web Engagement Server:

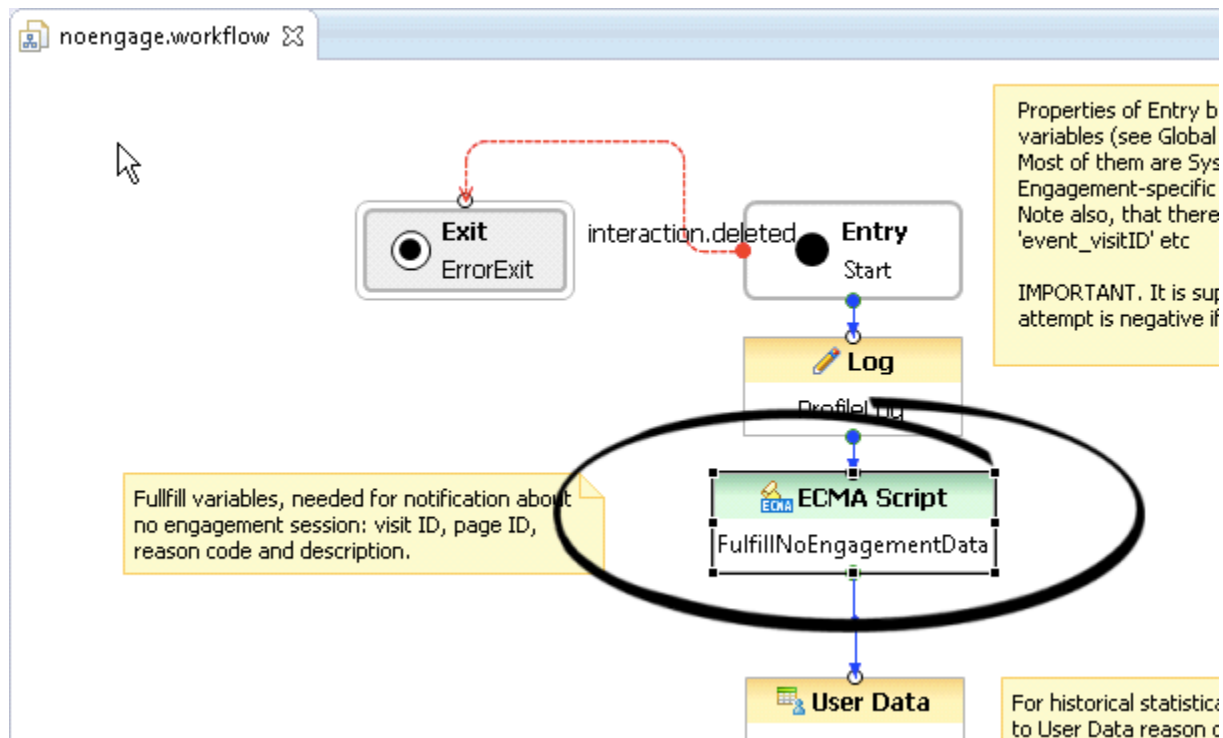


The REST request cancels the engagement

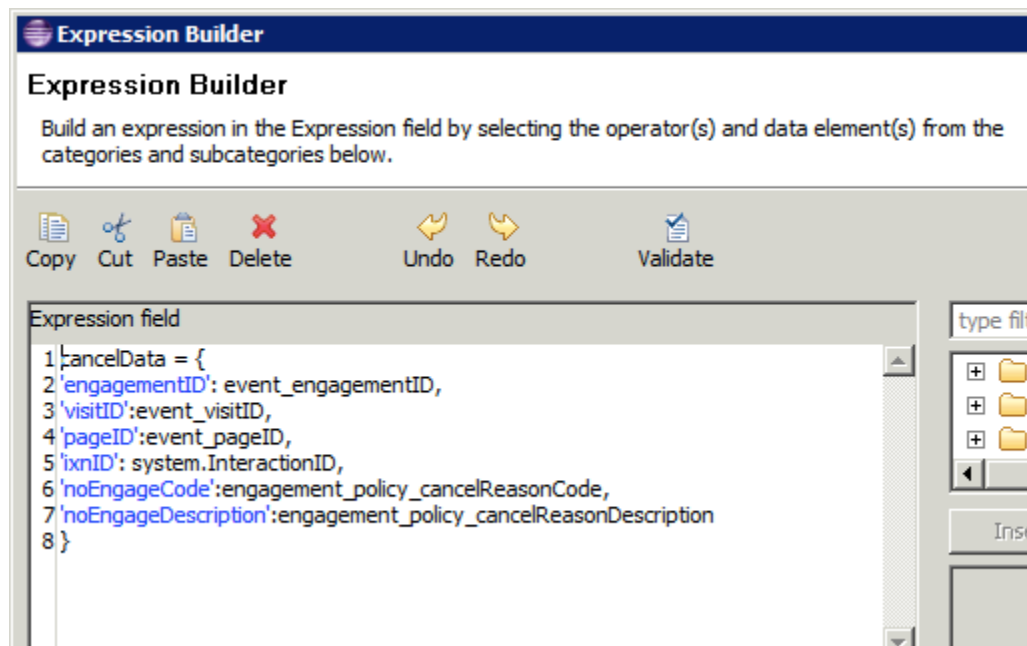
Security (authentication) aspects are the same as described in the **getRESTInfo.workflow**.

## Fulfilling "no engage" Data

**no engage** data is available in the script properties of the **FulfillNoEngagementData** block:



It contains six mandatory fields:



### Cleaning Interaction Process

In GWE 8.1.2 the cleaning process was responsible for removing stuck **webengagement** interactions. An interaction can be stuck in one of the interaction queues for various reasons. For example:

- Visitor obtained engagement invitation. This means that the **webengagement** interaction was put into the **Webengagement\_Accepted** queue.
- Power-off appeared on visitor's host, so the answer (Accept, Reject, or Timeout) was not delivered to Genesys Web Engagement.

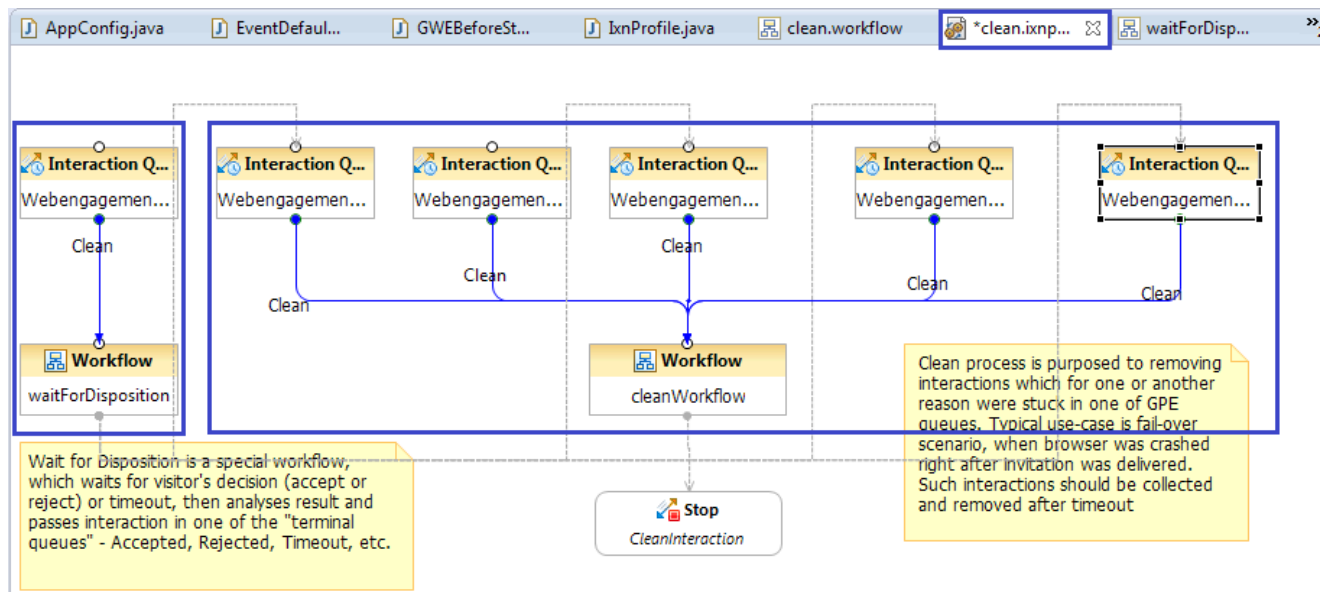
In this case, you need to define the cleaning process, which is also built on the top of ORS strategies.

The cleaning interaction process in Web Engagement 8.5 also carries out some other important functions. It is responsible not only for cleaning stuck interactions, but also for the entire life cycle of **webengagement** Open Media interactions, including these functions:

- Detecting when an interaction should be moved into a specific Interaction Queue
- Moving an interaction through the Interaction Queues
- Detecting when an interaction should be terminated
- Terminating an interaction

The Cleaning process has 6 entry points:

- **Webengagement\_Engaged**
- **Webengagement\_Accepted**
- **Webengagement\_Missed** (new in GWE 8.5)
- **Webengagement\_Rejected**
- **Webengagement\_Failed**
- **Webengagement\_Timeout**



Note that the **Webengagement\_Qualified** queue is no longer monitored by the Web Engagement 8.5 cleaning process. It is only used in the main process.

The cleaning process has two workflows:

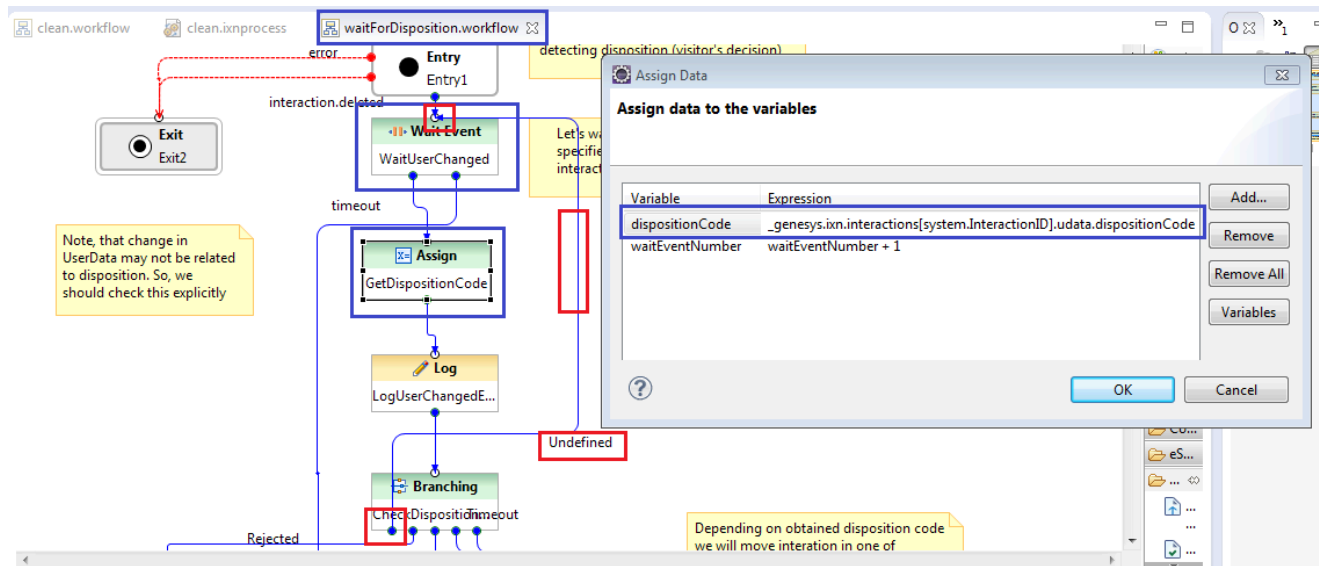
- **waitForDisposition.workflow**
- **clean.workflow**

The **waitForDisposition.workflow** only works with the **Webengagement\_Engaged** queue, while **clean.workflow** works with all other queues and is extremely simple, as it only stops the interaction.

### The "Wait for disposition" flow

This new workflow is dedicated to listening for User Data changes in **webengagement** interactions and deciding which Interaction Queue the interaction should be moved to.

The interaction's disposition code (accept, reject, and so on) will be available in User Data as a key-value pair with a key of `dispositionCode`. As soon as the `dispositionCode` key-value pair is obtained, the result will be analyzed.



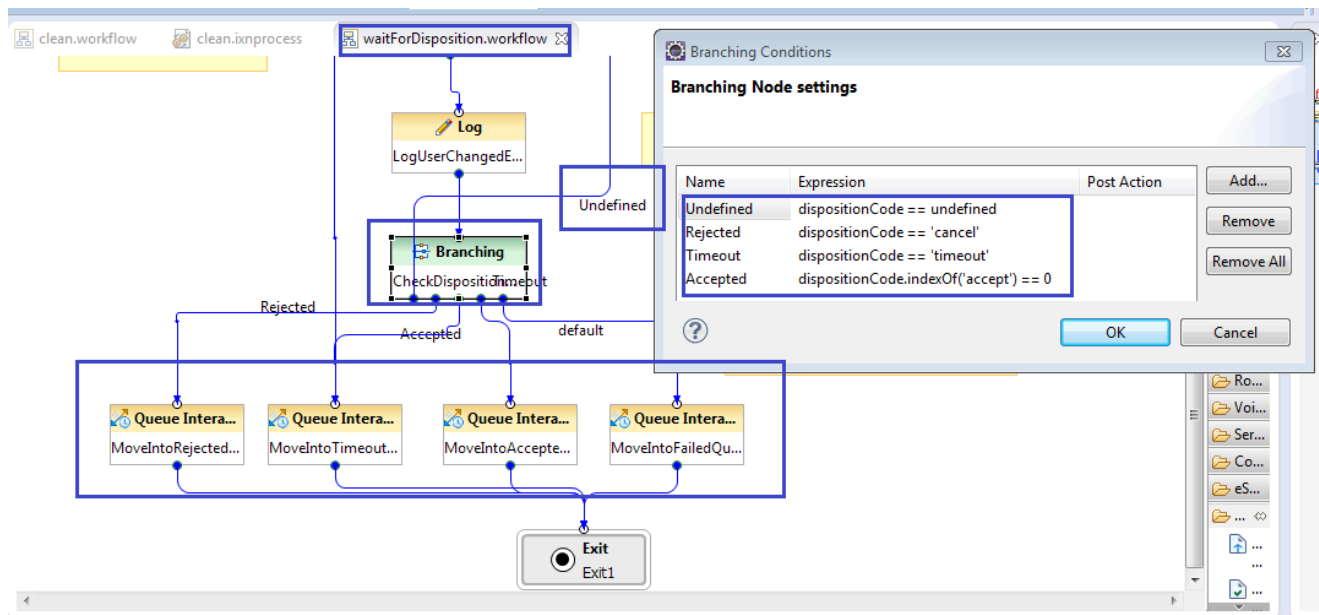
Here are the valid values for dispositionCode and the queues their interactions are placed in:

Value	Description	Queue
accept	The visitor has accepted the engagement invite	Webengagement_Accepted
cancel	The visitor has cancelled the engagement invite	Webengagement_Rejected
timeout	The engagement invite has timed out	Webengagement_Timeout
pageExit	The visitor has exited the page	Webengagement_Failed

### Notes

- For all other disposition code values, the associated interaction will be placed in the **Webengagement\_Failed** queue.
- If the disposition code is not defined, the strategy will wait for the next User Data change or for a timeout.
- Disposition codes values are case-sensitive. For example, on receiving a disposition code of Accept (instead of accept) Web Engagement will place the associated interaction in the **Webengagement\_Failed** queue
- If a timeout occurs, the interaction will be placed in the **Webengagement\_Timeout** queue.





### The "Cleaning" flow

The cleaning flow is quite simple: it stops the interaction. It operates with 5 terminal Interaction Queues:

- Webengagement\_Accepted
- Webengagement\_Missed
- Webengagement\_Rejected
- Webengagement\_Failed
- Webengagement\_Timeout

As soon as the interaction reaches one of these queues, it will be stopped by the strategy.

## Propagating Data from Engagement Logic strategy into Chat Routing Strategy

### Use Case Description

In the routing process, it often makes sense to use business data from events that are produced on the browser side. The Web Engagement Server automatically attaches this data to the User Data of the **webengagement** interaction, but you can also propagate it to the chat or web callback interactions.

For example:

- Business data produced on the page provides information about language.
- This information is passed as a User Data key into the **webengagement** interaction.
- During the Engagement Logic strategy, language information is re-attached and propagated to the chat interaction.
- The Chat Routing strategy reads language information from the User Data of the chat interaction and decides into which group to route the chat interaction.

The following are details of the described data propagation.

### Attach UserData to the webengagement Interaction

All of the User Data contained in a **webengagement** Open Media interaction can be propagated into a media interaction created on the top of the **webengagement** interaction.

The propagated fields are controlled by the **keysToPropagate** option in the **[userData]** section.

Additionally, you can collect data in the Engagement Logic strategy and attach it to the **webengagement** interaction by using the User Data block, then you can add related fields into the **keysToPropagate** option.

### Control Copying UserData from webengagement Interaction to the Chat (or web callback) Interaction

When a chat or web callback interaction is created, GWE attaches the UserData available in its parent Open Media **webengagement** interaction. You can control how this data is attached by using the **keysToPropagate** option in the **[userData]** section of the Web Engagement Server application. This option has three modes:

- Copy all UserData
- Do not copy UserData
- Copy only specific KV pairs from UserData

The following tables provide example values for the **keysToPropagate** option. In these examples, the Open Media **webengagement** interaction UserData contains the keys **ORS Data**, **rule**, **strategy**, **some data**.

Value of keysToPropagate	Data in the engagement interaction
all	All keys are copied: ORS Data, rule, strategy, some data.
no	No keys are copied.
rule;strategy	The rule, strategy keys are copied.
<i>blank or empty</i>	If the value of keysToPropagate is absent or has an empty value, no keys are copied.
my_key1;ORS Data	The ORS Data key is copied. my_key1 is ignored because it is not part of the keys in the Open Media <b>webengagement</b> interaction UserData.

## Accessing Pacing Information from the Engagement Logic Strategy

In release 8.5, Web Engagement provides the Engagement Logic strategy with pacing data for the chat and web callback channels. You can access pacing information in two ways:

- Through the consolidated channel capacity (measured in the number of "allowed" interactions).
- Through detailed information for each channel, which contains capacity (measured in the number of "allowed" interactions) for each particular group in a channel.

### Important

The pacing information available to the Engagement Logic strategy is different from the information returned from the Pacing API. You should evaluate each type of pacing information carefully before deciding how to use it.

Pacing information is added to **webengagement** open media interaction User Data by the Web Engagement Server. This information can then be read in the SCXML strategy — see [Main Interaction Process and Workflow](#) for an example. The information is located (among other specific data, such as the data provided in business events) in the User Data of the **webengagement** interaction, as described above in the section on [Accessing User Data from the webengagement Interaction and Passing it into Sub-flows](#).

## Understanding How the Pacing Algorithm Works

A dedicated pacing algorithm serves each particular group of agents, so if you have 2 chat-oriented and 1 web callback-oriented group of agents, there will be 3 instance of the pacing algorithm (1 for each group).

The agent availability on the specific channel is calculated taking into account the following:

- The agent state on the particular media (chat and web callback are different)
- Capacity rules.

For example, consider an agent who has a capacity rule for 2 chat interactions. In this scenario, the following statements are true:

- Agent is Ready and has no interactions in progress. In this case, the agent is treated as 2 Ready agents with a capacity rule of 1.
- Agent is Ready and has one interaction in progress. In this case, the agent is treated as 1 Ready agent with a capacity of 1.
- Agent is Ready and has two interactions in progress. In this case, the agent is treated as 0 Ready agents with a capacity of 1.
- Agent is Not Ready (count of interactions in progress does not matter). In this case, agent is treated as 0 Ready agents with a capacity of 1.

The agent availability on the specific channel is also handled differently in the two main pacing algorithm methods, SUPER\_PROGRESSIVE and PREDICTIVE\_B.

The SUPER\_PROGRESSIVE method consumes the following major parameters:

- The number of Ready agents in the group.
- The number of pending (waiting for answer) interactions.
- HitRate - the percentage of accepted invitations compared to the general number of proposed engagement invitations.

### Important

It is important to remember that the values of these parameters are continuously changing.

Consider the following example: There are 7 Ready agents (each with a capacity rule of 1), the number of pending interactions is 5, and the HitRate is 0.05.

In this case, the pacing algorithm might predict the number of allowed interactions approximately as  $(7 / 0.05 - 5) = 135$ .

### Important

This example is intended to provide a basic idea of how the pacing algorithm works. The finer details are more complex.

The PREDICTIVE\_B method consumes the following major parameters:

- The number of logged in agents in the group.
- The Average handling time of interactions. For example, the average duration of a chat session with visitors.
- HitRate - the percentage of accepted invitations compared to the general number of proposed engagement invitations.

### Important

It is important to remember that the values of these parameters are continuously changing.

This algorithm is more complex than SUPER\_PROGRESSIVE, but the general information described for SUPER\_PROGRESSIVE also applies to PREDICTIVE\_B: The number of 'allowed' interactions will significantly exceed the number of Logged In agents (depending, first of all, on the HitRate parameter).

## Consolidated Pacing Information by Channel

Capacity for the chat channel is available in the **pacing\_chatCapacity** field and capacity for the web callback channel is available in the **pacing\_webcallbackCapacity** field.

For example:

```
pacing_chatCapacity:12
...
pacing_webcallbackCapacity:0
...
```

## Detailed Pacing Information

Detailed pacing information is available as a nested JSON object with the following structure:

```
pacing: {
  channels :
  [
    {
      name: <name of this channel>,
      groups:
      [
        {
          name: <name of this group>,
          capacity: <count of allowed interactions for this group>,
          reactiveTrafficRatio: <portion of inbound chat\webcallback traffic that should be
'left' in the system>
        },
        ...
      ],
      capacity: <count of allowed interactions for this channel>
    },
    ...
  ]
}
```

You can access detailed information in the Engagement Strategy SCXML as follows:

```
var pacingData = JSON.parse(_genesys.ixn.interactions[system.InteractionID].udata.pacing);
var currentChannel = undefined;
var channel = undefined;
var chatChannel = undefined;

for (channel in pacingData.channels) {
  currentChannel = pacingData.channels[channel];
  if (currentChannel.name=='chat') {
    chatChannel = currentChannel;
    break;
  }
}

var englishChatGroupCapacity = undefined;
var group = undefined;
var currentGroup = undefined;

if (chatChannel != undefined) {
  for (group in chatChannel.groups) {
    currentGroup = chatChannel.groups[group];
    if (currentGroup.name=='English Skill Group') {
```

```
        englishChatGroupCapacity = currentGroup.capacity;
        break;
    }
}
```

## Example of Using Pacing Information

### Agents

Consider the following scenario where there are four chat and voice groups with agents in each group:

- English Language Chat Group = Adam (logged in and ready) and Anna (logged in, not ready)
- Dutch Language Chat Group = Bart (NOT logged in) and Berta (NOT logged in)
- English Language Voice Group = Adam (logged in and ready) and Amanda (logged in and ready)
- Dutch Language Voice Group = Dan (logged in, ready)

The following group configuration options are set on the Web Engagement Cluster application:

- **chatGroups** = English Chat Group;Dutch Chat Group
- **voiceGroups** = English Voice Group;Dutch Voice Group

### Customers

On the customer-facing website, two events are triggered simultaneously:

- **Chris** triggers a Hot Lead event on an English page.
- **Merijn** triggers a Hot Lead event on a Dutch page.

### Pacing information

When events are triggered simultaneously, pacing information is the same. In this scenario, the SUPER\_PROGRESSIVE algorithm is used and the following parameters were true at the moment the events were triggered:

- English Chat Ready agents: 1
- Dutch Chat Ready agents: 0
- English Voice Ready agents: 2
- Dutch Voice Ready agents: 1
- HitRate: 0.2
- Pending engagement invites: 0
- Reactive traffic is turned off

In this case, the results might look like this:

```
...
chatChannelCapacity : 5,
webcallbackChannelCapacity : 16,
pacing: {
  channels :
  [
    {
      name: "chat",
      groups:
      [
        {
          name: "English Language Chat Group",
          capacity: 5,
          reactiveTrafficRatio: 0
        },
        {
          name: "Dutch Language Chat Group",
          capacity: 0,
          reactiveTrafficRatio: 0,
        }
      ],
      capacity: 5
    },
    {
      name: "webcallback",
      groups:
      [
        {
          name: "English Language Voice Group",
          reactiveTrafficRatio: 0,
          capacity: 11
        },
        {
          name: "Dutch Language Voice Group",
          reactiveTrafficRatio: 0,
          capacity: 5
        }
      ],
      capacity: 16
    }
  ]
}
```

### Possible Engagement Logic SCXML flows

In this scenario, the following SCXML flows are possible for the two customers, Chris and Merijn:

- **Chris**

We can extract the capacity for the "English Language Chat Group" (5) and "English Language Voice Group" (11) from the pacing data.

In the decision workflow, it is possible to engage Chris on the chat or web callback channel. It is also possible to show him a modified invitation, where he can explicitly choose chat or web callback.

- **Merijn**

We can extract the capacity for the "Dutch Language Chat Group" (0) and "Dutch Language Voice Group" (5) from the pacing data.

In the decision workflow, it is possible to engage Merijn on the web callback channel only.