GENESYS™

Deployment Guide

Use Predefined and User-Defined Bundles

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What are Bundles?

Predefined Bundles

A predefined bundle is a group of standard Genesys-sellable items that are configured and named for you for resale as a single feature to your customer. The predefined bundle appears as a single item in the license-usage measurement data that is accessed for billing and other tenant reports in License Reporting Manager (LRM).

User-Defined Bundles

A user-defined bundle is a group of standard Genesys-sellable items that you configure and name for resale as a single feature to your customers. The user-defined bundle appears as a single item in the license usage measurement data that is accessed for billing and other tenant reports. You have the option of creating the bundle definition file manually and importing it into LRM. Each of the user-defined bundles has an ID, name, description, and definition in terms of included and excluded sellable items.

Bundle Set

A bundle set is a set of related bundles that are managed as a group. Each bundle set has an ID, name, description, issue date (the date that the set was created), valid from date, valid to date, and a list of bundles within that set. The ID of the bundle set and the ID of the bundles must be unique, must be numeric and must be greater than or equal to 10000.

The bundle set is considered active, if the requested reporting date belongs to the date interval that is defined in this set (the `valid_from` date to the `valid_to` date). You may have many active bundle sets during the reporting period, and it is possible for the bundle sets to overlap. If there is more than one active bundle set, then LRM uses the bundle set where the `issue-date` is the latest date.

Logical Expression for a User-defined Bundle

The logical expression for a user-defined bundle takes the form of two lists—the Include list and the Exclude list. LRM reports a seat as using a license for a given bundle type, if at least one of the license types in the Include list is used during the login session and none of the license types in the

Exclude list is used during the login session. The bundle definitions can be represented as two linked tables: Included Sellable Items and Excluded Sellable Items.

Included Sellable Items

Bundle GUID	Bundle name	SI-1 included	SI-2 included	...	...	SI-40 included
Id-1	B1	0	1	...	...	0
Id-2	...			...	...	
Id-3	Bn	1	1	...	...	1

Excluded Sellable Items

Bundle GUID	SI-1 excluded	SI-2 excluded	...	...	SI-40 excluded
Id-1	0	1	...	...	0
Id-2			...	...	
Id-3	1	1	...	...	1

When a sellable item is included in a bundle, the corresponding field in the Included Sellable Items table has the value of 1. If a sellable item is not included in a bundle, it has the value of 0. When a sellable item is excluded from a bundle, the corresponding field in the Excluded Sellable Items table has the value of 1. If a sellable item is not excluded, it has the value of 0. Note the difference between a bundle being excluded and not included.

Logical Expression Example

Suppose you decided to define four bundles into the following:

- Bundle 1—Advanced Voice:
  - Includes:
    - Agent Desktop
    - Outbound Contact
    - Third-party work items
  - Excludes:
    - E-mail
    - GVP Speech
- Bundle 2—E-mail:

- Includes:
  - E-mail
- Excludes:
  - Outbound Contact
  - Third-party work items
  - GVP Speech
  - Web Media
- Bundle 3—AutoContact:
  - Includes:
    - GVP Speech
  - Excludes:
    - Outbound Contact
    - Third-party work items
    - E-mail
    - Web Media
- Bundle 4—Advanced Plus:
  - Includes:
    - Outbound Contact
    - Third-party work items
    - E-mail
    - Web Media
    - GVP Speech

The following linked sellable items tables show the contents of these four bundles and demonstrate which sellable items are included and excluded:

Included Sellable Items

Bundle name	Genesys CIM	SIP Server	Desktop	Outbound	Third-party	E-mail	GVP	Web
Advanced	0	0	1	1	1	0	0	0
E-mail	0	0	0	0	0	1	0	0
AutoContact	0	0	0	0	0	0	1	0
Advanced Plus	0	0	0	1	1	1	1	1

Excluded Sellable Items

Bundle name	Genesys CIM	SIP Server	Desktop	Outbound	Third-party	E-mail	GVP	Web
Advanced	0	0	0	0	0	1	1	1
E-mail	0	0	0	1	1	0	1	1
AutoContact	0	0	0	1	1	1	0	1
Advanced Plus	0	0	0	0	0	0	0	0

Calculating Seats

Bundle usage is calculated in the same way that concurrent sellable item usage is calculated.

To calculate the value of any user-defined bundle, the LRM shell script calculates all Genesys-sellable items that make up that particular bundle. Then, LRM applies the bundle definition to comply with the include and exclude rules.

For example, by using the E-mail user-defined bundle in the Logical Expression Example:

- For each one minute interval, LRM calculates the sellable item Genesys E-mail for every corrected seat.

- If the seat has a sellable item type of Genesys E-mail, LRM checks to confirm this seat does not have: Genesys Outbound, third-party work items, GVP or Web items.

- If all conditions are true, the minute for this seat is stored for bundle calculation. If just one condition is false, the value for this one minute is zero (0).

- This procedure is applied to all other seats for this minute interval and the total number of satisfied seats for this minute is stored by LRM. This process continues for the entire reporting interval and the maximum value with corresponding timestamps are stored as the value of the E-mail user-defined bundle.

User-Defined Bundle File Format

User-Defined Bundle File Format

The Bundle File is an XML file that uses the following structure:

<lrm_bundle_set>

The `lrm_bundle_set` element is the root element of the Bundle File.

Attributes

Attribute	Required	Description
issue_date	Yes	The issue date of the bundle set, in YYYY-MM-DD format.
valid_from	Yes	The date this bundle set is valid from, in YYYY-MM-DD format.
valid_to	Yes	The date this bundle set is valid to, in YYYY-MM-DD format.
id	Yes	The unique ID of the bundle set.

Child Elements

Child element	Occurrence	Description
header	Once	The bundle set header
bundle	One or more times	The bundle element

<header>

The `header` element is the header of a bundle or bundle set.

Child Elements

Child element	Occurrence	Description
name	Once	The name of the bundle or bundle set
description	Once	The description of the bundle or bundle set

<bundle>

The `bundle` element is the bundle definition.

Attributes

Attribute	Required	Description
id	YES	The id of the bundle, must be a unique number greater or equal to 10000.

Child Elements

Child element	Occurrence	Description
header	Once	The bundle header
include_items	Once	The list of bundle included items
exclude_items	Zero or more times	The optional list of bundle excluded items

<include_items>

The `include_items` element is the list of bundle include items.

Child Elements

Child element	Occurrence	Description
sellable_item	One or more times	The sellable items

<exclude_items>

The `exclude_items` element is the list of bundle exclude items.

Child Elements

Child element	Occurrence	Description
sellable_item	One or more times	The sellable items

<sellable_item>

The `sellable_item` element is the sellable item description, which is in the `include_item` or `exclude_item` list.

Attributes

Attribute	Required	Description
item	YES	The name of the Genesys-sellable item.
license_type	YES	The type of license. In this release, only concurrent_seat license type is supported.

Bundle File Example

Bundle File Example

```
<?xml version="1.0" encoding="utf-8" ?>
<lrm_bundle_set issue_date="2010-01-01" valid_from="2010-01-15" valid_to="2010-12-31"
  id="5000" >
  <header>
    <name>Basic bundle set_1</name>
    <description>General use bundles</description>
  </header>
  <bundle id="10001">
     <header>
       <name>A-Out Advanced Voice</name>
       <description> Voice only</description>
     </header>
     <include_items>
       <sellable_item item="genesys_inbound_voice" license_type="concurrent_seat"/>
       <sellable_item item="sip_server" license_type="concurrent_seat"/>
       <sellable_item item="genesys_network_voice" license_type="concurrent_seat"/>
     </include_items>
     <exclude_items>
       <sellable_item item="genesys_email" license_type="concurrent_seat"/>
     </exclude_items>
     <exclude_items>
       <sellable_item item="genesys_web_media" license_type="concurrent_seat"/>
     </exclude_items>
  </bundle>
  <bundle id="10002">
    <header>
      <name>A-Out Advanced Voice</name>
      <description> Voice only</description>
    </header>
    <include_items>
      <sellable_item item="genesys_inbound_voice" license_type="concurrent_seat"/>
      <sellable_item item="sip_server" license_type="concurrent_seat"/>
      <sellable_item item="genesys_network_voice" license_type="concurrent_seat"/>
    </include_items>
    <exclude_items>
      <sellable_item item="skills_based_routing" license_type="concurrent_seat"/>
    </exclude_items>
  </bundle>
```

```
  <bundle id="10003">
    <header>
      <name>A-Out Advanced Plus</name>
      <description>Voice and e-mail</description>
    </header>
    <include_items>
      <sellable_item item="genesys_inbound_voice" license_type="concurrent_seat"/>
      <sellable_item item="sip_server" license_type="concurrent_seat"/>
      <sellable_item item="genesys_network_voice" license_type="concurrent_seat"/>
      <sellable_item item="skills_based_routing" license_type="concurrent_seat"/>
      <sellable_item item="genesys_email" license_type="concurrent_seat"/>
      <sellable_item item="genesys_web_media" license_type="concurrent_seat"/>
      <sellable_item item="genesys_outbound_contact_ms" license_type="concurrent_seat"/>
    </include_items>
  </bundle>
</lrm_bundle_set>
```

Add a New Bundle Set

1. To add a new bundle set to your system, you must first create a new bundle file.

    - The `lrm_bundle_set` ID and bundle ID must be unique.

    - The `valid_from` date should not be earlier than the date you choose to import your bundle.

2. Browse to the destination location of your LRM application.

3. To upload the new bundle file using GAX, go to **Configuration > License Usage Reporting > Bundles** and click **Upload**.

The information from the bundle file is imported into the Configuration Server and the new user-defined bundle is added to your system where it is now included in calculations and reports.

Deactivate a Bundle Set

If you no longer require the use of a bundle set, you can stop the calculation of the bundle set by changing the `valid_to` date.

1. Change the date of the `lrm_bundle_set` in the Bundle File to yesterday's date (in UTC time zone).

2. To upload the new bundle file using GAX, go to **Configuration > License Usage Reporting > Bundles** and click **Upload**.

Even though you have changed the `valid_to` date in the Bundle File to yesterday's date, the report calculation for yesterday's date (in UTC time zone) is not affected because the bundle is still active for yesterday's date.

The information from the Bundle File is imported into the Configuration Server and deactivates the Bundle in your system. From this point forward it is no longer included in calculations and reports.

Change an Existing Bundle Set

Change an Existing Bundle Set

To change an existing bundle set, deactivate the old bundle set and then create a new one.

1. Deactivate the bundle set from a specific date.
2. Create a new bundle set and confirm you set the `valid_to` date of the newly created bundle is set to the day after the deactivation date in the previous step.
3. Change both of the IDs of the bundle sets and the IDs of all the bundles within those sets.
4. To upload the new bundle file using GAX, go to **Configuration > License Usage Reporting > Bundles** and click **Upload**.

Previous definitions of the bundles should be kept in the LRM database and Configuration Server in case you need run reports for past dates. The bundle definitions are required to create the report files.

The information from the Bundle File is imported into the Configuration Server and the changed user-defined bundle is updated in your system. From this point, the bundle set is updated with your changes for calculations and reports.