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CLOUD

PUREENGAGE CLOUD USER GUIDE

Genesys Confidential

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Table of Contents

TABLE OF CONTENTS **2**
1 ABOUT THIS USER GUIDE **5**
2 GENESYS PUREENGAGE CLOUD OVERVIEW **6**
2.1 BASIC CLOUD SERVICE ELEMENTS 6
2.2 GLOBAL CLOUD REFERENCE POINTS 6
3 DIGITAL **7**
3.1 CHAT 7
3.2 EMAIL 7
3.3 SMS 7
3.4 WEB CALLBACK 7
3.5 CO-BROWSE 7
3.6 WIDGETS 7
3.7 SOCIAL ENGAGEMENT (FACEBOOK AND TWITTER) 8
3.8 ALTOCLOUD PREDICTIVE ENGAGEMENTS 8
4 INBOUND **9**
4.1 INBOUND VOICE ROUTING AND TRAFFIC 9
4.2 POST-CALL VOICE SURVEY 9
4.3 PRIVATE AND GROUP VOICEMAIL 9
4.4 QUEUE CALLBACK 9
4.5 DESIGNER (VOICE AND DIGITAL) 9
4.5.1 Predictive Routing with Designer *9*
4.5.2 Designer Omnichannel Applications *10*
4.5.3 Designer MicroApps *10*
4.5.4 Context Routing *10*
4.5.5 Chatbots Support *10*
4.5.6 Voicebots Support *10*
5 ROUTING **11**
5.1 INTELLIGENT WORKLOAD DISTRIBUTION (IWD) 11
6 ANALYTICS **13**
6.1 REPORTING (REAL-TIME AND HISTORICAL) 13
6.2 DESIGNER ANALYTICS 13
7 OUTBOUND **14**
7.1 VOICE OUTBOUND 14

7.2 PROACTIVE OUTBOUND – SMS AND EMAIL 14
8 SELF-SERVICE AND AUTOMATION 15
8.1 ENTERPRISE IVR 15
8.2 PLATFORM AS A SERVICE (PAAS) IVR 15
9 COLLABORATION 16
9.1 PSTN & PBX BASED AGENTS 16
9.2 SIP ENDPOINT SOFTPHONE (EA) 16
9.3 DESK PHONE SUPPORT (EA) 16
9.4 OPEN-INTERNET-CONNECTED AGENTS 16
9.5 WEBRTC MEDIA SERVICE 16
10 WORKFORCE ENGAGEMENT MANAGEMENT 17
10.1 GENESYS INTERACTION RECORDING 17
10.2 IVR RECORDING 17
10.3 SCREEN RECORDING 17
10.4 QUALITY MANAGEMENT 17
10.5 WORKFORCE MANAGEMENT 17
10.6 PERFORMANCE DNA 17
10.7 INTERACTION ANALYTICS – SPEECH 18
11 OMNICHANNEL DESKTOP 19
11.1 AGENT WORKSPACE 19
11.2 SUPERVISOR WORKSPACE 19
11.3 CRM ADAPTER FOR SALESFORCE 19
11.4 AGENT SCRIPTING (APPFOUNDRY) 19
12 INTEGRATION 20
12.1 SUPPORTED APIS 20
12.1.1 WWE Service Client API 20
12.1.2 PureEngage Cloud Provisioning API 20
12.1.3 PureEngage Cloud Statistics API 20
12.1.4 PureEngage Cloud Workspace APIs for Voice and Chat 20
12.1.5 Genesys Engagement Services (GES) APIs 20
12.2 TASK ROUTING 20
12.3 BULK DATA EXPORT – WFM, INFOMART, AND INTERACTION RECORDINGS 20
12.4 APPFOUNDRY 20
13 OPEN PLATFORM 21
13.1 PARALLEL TEST ENVIRONMENT 21

13.2 INFRASTRUCTURE 21
13.3 SUPPORTED STANDARDS AND/OR CERTIFICATIONS 21
13.4 PORTAL 21
13.5 AGENT SETUP 22
13.6 CLOUD DATA DOWNLOAD SERVICE (CDDS) 22
13.7 OS AND BROWSER SUPPORT 22
13.8 TELECOM ARCHITECTURE 22
13.9 DEVICE MANAGEMENT 23
13.10 SUPPORTED PHONES 23
13.10.1 Supported Hard Phones 23
13.10.2 Supported Soft Phones 23
14 PUREENGAGE CLOUD DATA RETENTION POLICY 24
14.1 DEFINITIONS 24
14.2 POLICY 24
14.3 DATA RETENTION PERIOD BY SOLUTION CATEGORY 25
15 WIRELESS OUT-OF-BAND MANAGEMENT 26
16 SUPPORT 27

1 About this User Guide

This User Guide describes the elements of the PureEngage Cloud Service that are available for order. Only elements specified in a Services Order will be made available to any individual customer as indicated in the agreement.

2 Genesys PureEngage Cloud Overview

2.1 Basic Cloud Service Elements

Genesys' PureEngage Cloud leverages the world-class SIP-based contact center and Genesys Voice Platform (GVP)/Media Services products at the service's core and is offered on a subscription basis. Usage-based aspects of the service can be provisioned to meet the needs of customers, whether they have a large number of users, have need of on-premises integration with the service, or require enhanced routing and reporting. Built on Genesys' market-leading universal queuing and routing features, the Genesys suite supports blended seats, including blending inbound with outbound, voice with E-Services, or a number of other combinations. Rounding out the portfolio is a set of optional features to help customers optimize their contact centers, including call recording and Workforce Management.

2.2 Global Cloud Reference Points

- 9 Global points of presence including the US, Canada, APAC, and Europe
- Services enabled through leading providers include Amazon Web Services
- Service offers including MPLS and various TELCO providers; customers may have the option to leverage their established network or TELCO providers
- Georedundant High Availability and Disaster recovery
- Scalability to >10,000 agents per tenant customer
- PCI-DSS, ISO27001, HIPAA, and SOC compliant, conformance with the EU GDPR

3 Digital

3.1 Chat

Genesys Advanced Chat provides real-time live assistance to your web customers asynchronously, thus allowing customers to start and continue a chat session as needed. Customers Chat requests are managed and responded via the same service as your voice interactions. Customers can also be proactively invited to chat (through Altocloud).

3.2 Email

Genesys Email allows Customer Service Representatives or contact center agents to track, manage and respond to customer Email inquiries with the same service as traditional voice interactions. Message content is analyzed, and messages are routed to the best resource.

3.3 SMS

Connect a customer to the right resource anywhere in your business by routing customer text messages to your best-fit agents. Genesys SMS Routing uses skill-based routing so messaging your company for support is faster and more efficient than calling and enables conversations from anywhere.

3.4 Web Callback

Web Callback enables end consumers to click on a “request callback” link on a website, input data on a webform, and request a callback from the customer either immediately or at a scheduled time. Callback reporting provides active (real-time) and analytic (historical) views of how effectively your callback strategy is meeting consumer needs.

3.5 Co-browse

Genesys Co-browse lets customer service agents initiate co-browsing sessions that, in conjunction with real-time chat or phone support, enable them to provide more effective, and personalized, online assistance. By being able to view what online consumers are seeing, the agent can help with everything from resolving shopping questions to completing forms and applications. The ability to co-browse with consumers can prevent having to escalate problems to another channel, and boosts consumer satisfaction in the process.

3.6 Widgets

The Genesys Widgets solution provides a library of configurable, extensible, dynamic, and context-aware business widgets, which incorporate the user interface, business logic, and connections to your back-end Cloud Services. Genesys Widgets can be used on websites and in web applications to provide a personalized experience for your consumers:

- Webchat
- Callback
- Click-to-Call
- Co-browse

3.7 Social Engagement (Facebook and Twitter)

There's no getting around it—customers today are talking about your business on social media—either hoping to interact with you directly or sharing opinions with others about their experiences with your business. Genesys Social Engagement bridges the gap between customers and business

- Genesys Social Engagement Delivers
- Managing comments on Public Posts that needs attention
- Handle private conversation (Facebook Messenger & Twitter DM)
- Handle Twitter mentions and Twitter handles
- Public to Private conversations for higher customer satisfaction

Key Differentiators

- Public and Private in one place
- Freedom to manage multiple handles
- Manage customer's feedback globally and in public

3.8 Altocloud Predictive Engagements

The Altocloud predictive engagement solution uses machine learning and AI to build predictive models, in real-time, to segment visitors/prospects/customers into Personas and determine the ideal moments to engage customers using any communication channel.

Leveraging predictions about Outcome Probabilities, we instantly route interactions to best agents and integrate tightly with websites, CRMs, and marketing automation tools, to utilize all customer data/information and predict outcomes in real-time:

This enables you to:

- See what customers are doing before, during, and after interacting
- Notify reps about important visitors and their behaviors
- Act automatically to engage buying interest or need for support, assisted or automated
- Predict how, when, and who to engage based on needs, interests, and goals

4 Inbound

4.1 Inbound Voice Routing and Traffic

Using operational parameters and rules, administrators can control both custom routing strategies installed at the time of Provisioning, and pre-defined templates made available with the service. The customer's contact-center hours of operation are an example of an operational parameter that can be configured by administrators.

The inbound voice IVR service includes standard DTMF signaling and supports advanced options including Text to Speech (TTS) and Automatic Speech Recognition (ASR).

With the rich control afforded by operational parameters and rules, administrators have a web-based mechanism to control the service in near real time. More complex routing changes require either a Move/Add/Change/Delete (MAC/D) Services Order (placed with Customer Care) or a Statement of Work (SoW) through Professional Services, depending on the complexity of the requirement.

Routing Analytics provide the ability to view, in near real time and historically, the effectiveness of your routing applications to better understand your customer experience.

Throughout the lifecycle of the service, the Genesys Cloud Customer Portal (also known as Portal) will evolve to allow more customer administrative and routing changes to be made without a MAC/D Services Order. Customers will always have the option of engaging Professional Services (via a SoW) to make more complex changes.

4.2 Post-call Voice Survey

The Voice service includes an integrated and simple-to-engage voice survey option that allows for reliable measurement of customer satisfaction through post-call surveys that include the ability to capture and report on metrics related to the user experience.

4.3 Private and Group Voicemail

Genesys voicemail enables group and personal voicemail. Features include the capture of messages, playback, deletion, and storage, as well as a Message Waiting Indicator on the Agent Desktop. Email notification is also supported.

4.4 Queue Callback

The Genesys queue callback service allows consumers to request a callback when they are in queue, either as soon as possible, or at a scheduled time. Callback reporting provides active (real-time) and analytic (historical) views of how effectively your callback strategy is meeting your customers' needs.

4.5 Designer (Voice and Digital)

Genesys Designer provides a simple intuitive web-based call flow design tool. It supports both self-service and assisted-service call flows. Designer includes predefined routing blocks to support after-call voice surveys and immediate and scheduled callback. This same administration tool also provides support for managing operational parameters and announcements.

4.5.1 Predictive Routing with Designer

Determines the best possible match between waiting interactions and available agents by drawing on accumulated agent and interaction data, analyzing interactions and outcomes, and generating models to predict outcomes.

4.5.2 Designer Omnichannel Applications

Build your self-service and routing apps once and point the application to voice and chat channels.

4.5.3 Designer MicroApps

The Designer MicroApps Store is an independent component that provides a store-like service to enable Designer users to download pre-built modules for use in their applications. It provides end-to-end workflow covering the entire life cycle of reusable artifacts relevant to application development and management. The Designer MicroApps store also:

- Provides administration capabilities to internal Genesys users to submit, review, and approve packages
- Enables Genesys customers to browse for MicroApps from within Designer and download them to their Designer instances
- Processes the packages and makes them available for use, similar to how Designer Shared Modules are used currently

4.5.4 Context Routing

Genesys Context Routing allows businesses to access their customer data to personalize the routing or IVR experience for their consumers.

4.5.5 Chatbots Support

Customers may use Designer and Dialog Engine to create a chatbot natively or bring their own bot (such as Amazon Lex). With Chatbots, you can:

- Automate tasks and assist with queries across multiple channels—web, mobile, social, SMS, and messaging apps
- Alleviate strain on your contact center employees while improving the customer experience and controlling costs
- Chatbots are always on and available, and can be handed over to an agent within business hours or offer a callback when outside of business hours or at busy times

4.5.6 Voicebots Support

Voicebots provide AI driven natural language understanding, allowing rich self-service of voice interactions. Voicebots increase self-service containment and enhance the customer experience through natural language. Voicebots support includes:

- AI-driven Natural Language Understanding
- Third Party Transcription + Third Party or Native Intent Determination
- Designer support for:
    - Amazon Lex
    - Google Dialogflow
    - Genesys Dialog Engine with Google SR Transcription and GVP Call dialog management
- Mix and Match Native and Third-Party Bots even within a single interaction

5 Routing

5.1 intelligent Workload Distribution (iWD)

Genesys Cloud intelligent Workload Distribution (iWD) is a business application for dynamically prioritizing the distribution of work tasks to the employee best suited to handle them. Genesys Cloud iWD provides out-of-the-box business-user functionality that integrates enterprise software with employees, customer experience capabilities, internal business processes, and delivers business benefits quickly. Capturing work items from any system, continuously prioritizing and classifying the work to push the work to the best available employee.

Genesys Cloud iWD works in concert with existing enterprise software applications (such as ERP, BPM, DCM, Salesforce) as well as homegrown legacy systems, to create a single, global task list, which is sorted based on business value, ensuring that the right resources, regardless of location, are proactively receiving the most critical or highest value tasks, regardless of media-type or system, at the right time and right location. iWD comes with specific integration capabilities called Capture Points. These capture points are designed to ease the integration with source systems that own the tasks.

Efficiently managing customer requests requires an understanding of the business context of the request. For example, the associated business process, the product requested, or value of the customer making the request are important criteria for calculating service levels and routing to the right resource based on business value. With Genesys Cloud iWD, enterprises can effectively manage all customer service resources and business processes across the enterprise, going beyond the walls of the formal contact center and into other areas of the business-like branch offices and experts in the back-office.

At the heart of Genesys Cloud iWD is a set of features and functions, designed for business users, to more effectively manage tasks in the organization and provide the business agility required in today's competitive marketplace.

- **Business Context Configuration** – Cloud iWD requires the source system to classify the task and pass onto iWD to match with the appropriate departments and business processes, against which tasks are then managed and reported on. Adding new departments or business processes is a simple matter of configuration by a business user.

- **Service Level Agreement-based Rules** – The Cloud iWD service level rules ensure tasks are completed according to the service level agreements (SLA) defined by business users. SLA rules quickly order the tasks from most important to least important, based on business value. Because information related to a task can change, iWD automatically re-assesses tasks throughout their lifecycle, ensuring the most important are at the top of the global task list.

- **Task Management** – Operations Managers and Team Leads with appropriate security permissions can:

    - View tasks captured
    - Hold, resume, and cancel tasks
    - Modify task attributes and updates take effect immediately
    - Manage flexible and business-friendly prioritization schemes

- **Business Insights** – Cloud iWD offers a set of task-based statistics providing insight into business performance and comparisons against key performance indicators configured in iWD by business users. Business insights are available for the current day, and intraday historically.

6 Analytics

6.1 Reporting (Real-time and Historical)

The service includes operational and historical reporting. Web-based, near real-time operational reporting is provided through a standard set of reporting templates or widgets. New operational reporting templates can be authored and/or customized by Genesys for additional fees.

For historical reporting, many configurable templates are available. Users can directly tailor historical reports using filters and drill-down features of the existing reports, as well as modify or build a new report with a few drag-and-drop maneuvers via a standard web-enabled user interface. Custom reports can be saved in a shared repository or to the desktop for offline use. The reports can be accessed subject to role-based restrictions and automatically distributed via various media, including mobile devices. Users can download detailed interaction information to perform additional analytics based on the customer's business requirements.

6.2 Designer Analytics

Designer Analytics offers a close-to-real-time view of what is happening in your contact routing environment.

7 Outbound

7.1 Voice Outbound

The Genesys cloud-based dialer lets you develop sophisticated outbound contact strategies that leverage preview, predictive, and progressive dialing.

- *Preview Dialing* – Distribute calls from a list to the agent's desktop on request.
- *Progressive Dialing* – Initiate an outbound call when an agent is available and no calls are in queue.
- *Predictive Dialing* – Leverage a predictive dialing algorithm to pace outbound calls, including compliance, auto pacing, and unproductive call filtering (voicemail, busy, disconnected numbers).
- *Blending Inbound/Outbound* – The dialer supports the blending of inbound calls and outbound campaigns, allowing agents to balance their time in a manner that delivers higher customer satisfaction and service levels.
- *Outbound Automated Voice Messaging* – Automated message notification service enables you to proactively notify customers about upcoming appointments, prescription availability, or other key events.

Separate provisioning fees will apply for Genesys to create and manage outbound dialing campaigns and enable blended inbound/outbound dialing on the customer's behalf.

7.2 Proactive Outbound – SMS and Email

Genesys Outbound SMS and Email supports automated one-way and interactive text or email message campaigns to customers without involving an agent. Included is the ability to create standalone message campaigns or sophisticated multi-channel, blended outbound campaigns using Dialer, Outbound IVR, Text and/or Email channels that leverage escalation capabilities based on the results of previous contact attempts. Campaigns can be scheduled in advance or individual messages can be sent on demand. Both email and SMS messages can be personalized.

For SMS, Genesys supports short codes, text-enabled toll-free numbers, long codes, and alpha sender IDs.

Outbound SMS and Email can be used for marketing and sales promotions, proactive status notifications, collections efforts, and interactive surveys.

When used in conjunction with the inbound SMS and Email routing services, customer responses to proactive email and SMS messages can be routed to an appropriately skilled and enabled agent to continue the conversation.

8 Self-Service and Automation

8.1 Enterprise IVR

The Cloud Enterprise IVR solution delivers rich self-service IVR capabilities. Genesys provides this service offering based on its own widely-deployed VoiceXML IVR. The service includes a set of web interfaces to enable administrative control, and it provides both call and application reporting. Service usage may be purchased as either Port Subscriptions or Per-Minute Subscriptions. Cloud self-service customer engagement solutions are solely based on IVR, without agent engagement; however, the solution is designed to integrate with the customer's standard call routing and computer telephony integration (CTI) systems to provide an integrated caller experience when self-service becomes assisted service and callers opt to speak to an agent.

8.2 Platform as a Service (PaaS) IVR

The Platform as a Service IVR solution provides similar self-service capabilities to Enterprise IVR, including speech recognition and text-to-speech services. However, PaaS IVR enables the customer to continue to use their existing on-premise applications and tools. Calls are placed to the Genesys PureEngage Cloud platform, and customer applications are retrieved at runtime by the PaaS IVR platform. The customer retains application development, reporting, and back-end integrations on their own premises. PaaS IVR can help customers take a measured step towards PureEngage Cloud, while continuing to maintain their own application tier. PaaS IVR also enables customers to perform phased migrations to Enterprise IVR.

PaaS IVR supports pure self-service, as well as call transfer to a customer demarcation point. Subsequent routing to customer-hosted assisted service (agents) is handled by the customer. PaaS IVR can also support routing to PureEngage Cloud agents, enabled through a Professional Services engagement. PaaS IVR includes administrative and reporting capabilities.

PaaS IVR supports the Genesys Intelligent Automation platform as a premise application server. Other VoiceXML-compatible premise application server platforms can be used as well. Contact Genesys Product Management for details.

9 Collaboration

9.1 PSTN & PBX based agents

Agents may use any PSTN-based or PBX-based phone set as long as the phone has Direct Inward Dialing (DID).

9.2 SIP Endpoint Softphone (EA)

Genesys softphone that seamlessly integrates with the agent desktop user interface.

9.3 Desk Phone Support (EA)

Hard phone SIP support is either directly connected to PureEngage cloud or serviced from another SIP enabled solution.

9.4 Open-internet-connected Agents

All agent UIs are accessed through the internet – no MPLS required.

9.5 WebRTC Media Service

Agents can use a softphone using the WebRTC protocol (includes OPUS codec and Encryption).

10 Workforce Engagement Management

10.1 Genesys Interaction Recording

To address the needs of both liability and quality recording, users can record all calls or just a portion. Call recordings can be based on standard telephony information or call routing data. For example, you can choose to record only “platinum customer” calls. All caller data you identify as relevant is also stored with the recording, enabling search. For example, you can search by standard telephony information such as caller ID. Call recordings can also be paused and resumed based on external events; for example, the service can trigger a pause during the collection process so that credit card information is not recorded. Users can access call recordings from any location with secure network connectivity.

10.2 IVR Recording

Call recordings can optionally include the IVR portion of each voice interaction. This allows for complete end-to-end capture of the customer experience from IVR answer to Agent hang up

10.3 Screen Recording

To address the needs of both liability and quality recording, users can record computer screens for either all voice interactions or just a portion. When enabled, screen recordings are captured as adjunct resources when the voice interactions are recorded.

10.4 Quality Management

To address the needs of both training and quality purposes, users can listen to, score, and administer call recordings as a part of a larger quality management program.

10.5 Workforce Management

The service delivers a comprehensive Workforce Management (WFM) solution, allowing forecasting, scheduling, adherence, and other standard administrative tasks through a web-based interface. By providing minimal configuration requirements and a rich set of pre-built contracts, shifts, and breaks, WFM makes it easy to get started. Users can see their current schedules through a standard web-based interface, while supervisors can view schedules, make shift adjustments, and perform schedule swaps. Additional WFM capabilities can also be configured by Professional Services as an optional service under a SoW.

10.6 Performance DNA

Performance DNA, part of the Workforce Engagement Suite, enables users to:

- Measure skills and knowledge of employees across both traditional contact center metrics as well as soft skills
- Analyze KPIs
- Make automated and personalized suggestions about what to do next to improve employee performance and engagement

Performance DNA helps you:

- Increase speed to competency and reduce employee churn
- Boost business performance and operational excellence
- Improve the employee experience

10.7 Interaction Analytics – Speech

You can analyze up to 100% of recordings to uncover why customers are contacting your company, what are their topics of conversation, why multiple contacts are needed to resolve specific issues, what processes cause customer frustration and whether your agents are providing an appropriate level of service.

11 Omnichannel Desktop

11.1 Agent Workspace

The service provides the web-based Genesys Agent Desktop that supports a variety of consumer interaction channels. The service can be easily integrated with a defined set of customer relationship management (CRM) or back-office applications via standard Genesys adapters. The service can also centralize multiple web applications together through a common interface and facilitate desktop navigation and workflow.

The Agent Workspace provides a variety of flexible configuration options that can be provisioned by the customer administrator. Options include:

- Providing a screen pop with the relevant attached data, including the ability to pass this attached data to a defined URL
- Displaying consumer interaction history on recent interactions
- Displaying user and service statistics
- Setting Not Ready Reason codes and Disposition codes

11.2 Supervisor Workspace

The web-based Genesys Supervisor workspace desktop supports a variety of functions required by supervisors to accurately lead and manage their teams. The supervisor workspace includes the ability to:

- Monitor voice and chat interactions with coach and barge-in support for monitored interactions
- Provide Email QA review
- Monitor and manage agent states
- Manage and edit interaction queues and workbins

11.3 CRM Adapter for Salesforce

The combination of Genesys with CRM applications significantly improves agent and enterprise productivity. Genesys provides the following integration options with Salesforce.com CRM:

- Genesys G-Plus Adapter enables you to integrate inbound voice and chat interactions with Salesforce.com. It offers screen pop of customer records, voice and chat call controls, access to standard response library, basic agent real-time performance dashboard, and click-to-dial outbound voice calling.
- To support Inbound Email and Outbound Voice Dialing Campaigns, agents require access to extended set of functions. In this case, a fully featured Genesys Agent Desktop (WWE) should be deployed with SalesForce.com in a C*onsole Mode*. Please contact your Genesys representative for details.
- Salesforce Lightning Experience is also supported

11.4 Agent Scripting (AppFoundry)

Agent Scripting is available through our AppFoundry marketplace. These scripting tools can be used to prompt agents through the call-handling process with customers. They can be used for either inbound customer service or outbound telemarketing calls. Agent Scripting is a powerful tool that supports branching to guide agents through different paths of the script, depending on the customer's answers to scripted questions. Additionally, agents can capture information about customers and update the customer database, process orders, or track ongoing customer service calls.

12 Integration

12.1 Supported APIs

12.1.1 WWE Service Client API

The WWE Service Client API enables developers to create custom agent applications that integrate with Genesys Cloud services. These applications can include features such as state management, call control, supervisor monitoring, and call recording.

12.1.2 PureEngage Cloud Provisioning API

Configure tenant environment, create users, and retrieve configuration data.

12.1.3 PureEngage Cloud Statistics API

Create a subscription for multiple statistics - receive notifications when values of those statistics change.

12.1.4 PureEngage Cloud Workspace APIs for Voice and Chat

Develop your own custom agent applications that integrate with Genesys Voice.

12.1.5 Genesys Engagement Services (GES) APIs

GES APIs support your mobile applications and can be used to query PureEngage Cloud for Estimated queue wait time, Hours or Operation, Available Timeslot, and Create/Query/Cancel Callback.

12.2 Task Routing

Task Routing allows you to implement a single orchestrated routing platform for all interaction types. You can use our REST API from your premises or cloud application to submit interactions to PureEngage Cloud. The Task Routing API also supports 'get info' and updating attached data.

12.3 Bulk Data Export – WFM, Infomart, and Interaction Recordings

The Genesys Cloud service includes the ability to provide data export services for integration into your premises' system of records solutions. This includes the ability to export and integrate data collected from:

- Cloud workforce management (WFM ETL)
- Agent, Queue, Call Flow, and Interaction metrics across all channels (BI Data Feed)
- Voice and Screen recordings and metadata (Recording Call Backup Service – RCBS)

Data exports are automated and can be downloaded based on the customer-preferred schedule.

12.4 AppFoundry

The Genesys AppFoundry marketplace makes it easier for out Cloud customers to access extended solutions built specifically for vertical and business needs. With AppFoundry, the broad community of PureEngage customers can easily find custom contact centers and customer experience applications.

13 Open Platform

13.1 Parallel Test Environment

The Cloud Parallel Test Environment (PTE) is a logically partitioned environment within a customer production tenant that allows the customer to:

- Test changes in the logic of customer IVR or voice routing applications
- Develop and test new IVR or voice routing applications
- Introduce changes in parameters of IVR or voice routing applications, and test the effects of these changes
- Create or change configurations for new business groups
- Promote validated changes into production environment

The Cloud PTE includes test DIDs, replication of the customer's production voice call flows, provisioning of unique agents, administration tools, and reporting.

Separate Implementation Fee[1], Provisioning Fees[2] and Usage Fees[3] may be assessed to provision and maintain the Cloud Parallel Test Environment.

13.2 Infrastructure

Genesys is responsible for all aspects of the PureEngage Cloud Service infrastructure located between the points of service demarcation with the customer's network, including Genesys-provided third-party applications, and other software, servers, select telecom services, load balancing, disaster recovery, capacity management, and more. Genesys' role and responsibility is further subject to the Support Guide.

The service is available in the USA, Canada, UK, Ireland, Australia, and New Zealand.

13.3 Supported Standards and/or Certifications

- SOC-II
- ISO 27001
- GDPR
- PCI-DSS
- HIPAA

13.4 Portal

The main access point to all Genesys PureEngage Cloud user interfaces is the Genesys Cloud Portal. The interfaces on the Portal are divided into three separate categories:

- User interfaces – standard interfaces to contact center services such as Agent and Supervisor workspace, Workforce Management, and Reporting. These interfaces are used by agents, supervisors, and managers.
- Administration interfaces – used by Contact Center administrators, supervisors, and managers to configure users, resources (such as IVR), and applications based on their roles.

[1] A one-time Implementation fee is assessed to initially configure the Parallel Test Environment.

[2] Provisioning fees (per Agreement) will be assessed when Genesys is engaged to provision changes in the environment.

[3] PTE Usage fees will be calculated based on User, Minute, and Port rates defined in the Agreement.

- Support interfaces – used by authorized contact center administrators to submit requests with Genesys Customer Care and to view service status and schedule.

13.5 Agent Setup

Agent Setup is the PureEngage Cloud evolutionary user management tool that provides support for customer administration of their contact center personnel resources. Among other capabilities, it includes support for:

- Agent & Skills management
- Bulk user provisioning (import and export of configuration data)
- Agent and supervisor workspace management and configuration
- Managing Caller ID for Outbound calls through the desktop
- Managing screen pop content
- Managing agent views
- Change control and audit

13.6 Cloud Data Download Service (CDDS)

The Cloud Data Download Service allows PureEngage Customers to export & download multiple types of data from single user interface.

- The first version supports data export from UCS

Manual or scheduled exports can be configured by the user via CDDS UI.

13.7 OS and Browser Support

Genesys Cloud services are accessed through web-based user interfaces that rely on a customer provided browser running on devices such as PCs or tablets.

- Supported Operating Systems: Windows 7, 8 or 10, 32-bit or 64-bit
- Citrix Version: Citrix Receiver 3.3
- Supported Browsers:
  - Chrome 70+
  - Firefox 63+
  - Microsoft Internet Explorer 11 (exception: Callback is not supported on IE)
  - Microsoft Edge (exception: Callback is not supported on Edge)

No drivers, applets, or any other downloads need to be made to the PC, with the exception of the Genesys SIP Endpoint and Screen Recording Client for users who are processing interactions (calls, emails).

13.8 Telecom Architecture

User access to the service is the responsibility of the customer. The customer provides bandwidth and availability based upon minimum requirements made known to the customer by Genesys.

13.9 Device Management

Enables a Genesys administrator to centrally manage and configure Audiocodes and Polycom SIP phones.

13.10 Supported Phones

13.10.1 Supported Hard Phones

Vendor	Phone Model	Firmware Version
AudioCodes	All 4xxHD Phones (420HD, 430HD, 440HD)	2.x (2.2.2+)
Genesys	420HD	2.x (2.2.2+)
Polycom	VVX IP Phones (VVX300, VVX400, VVX500, VVX600, etc.)	4.x, 5.x
Polycom	SoundPoint IP Phones (320, 335, 450, 550, 650, 670, etc.)	3.2.x, 4.0.x (v4.0.3.7562+)

13.10.2 Supported Soft Phones

Soft Phone Vendor	Phone Model	Phone Version
Genesys	SIP Endpoint SDK	8, 8.1, 8.5
Genesys	Workspace SIP Endpoint	8, 8.1, 8.5
Genesys	Softphone	8.5, Genesys Softphone 9.0

14 PureEngage Cloud Data Retention Policy

14.1 Definitions

- **Data** – Information that is stored in any form including on paper (typically referred to as hardcopy), or digital (often referred to as soft-copy or as electronically stored information). The term "data" includes, but is not limited to, databases, word documents, spreadsheets, PowerPoint presentations, electronic reporting systems, audio tapes, electronic tapes, backup tapes, optical discs, CD-ROMs, DVDs, email, voicemail, photographs, drawings, designs, or sketches.
- **Genesys Cloud Platform Data** – Data that is stored, utilized, processed or transmitted through, in, or by the Genesys Cloud Platform.
- **Retention** – The maintenance of data in a useable or recoverable format.
- **Retention Period** - The amount of time that data must be saved in a form that can be retrieved.
- **Legal Hold** – A process to preserve all forms of relevant information when litigation is reasonably anticipated. During the period of Legal Hold, normal document retention and destruction policies are suspended until the Legal Hold is lifted. Legal Hold notices are issued by Genesys Legal Department.

14.2 Policy

- Clarification of retention period: if the default retention period for a certain type of data is two (2) months, then data created on March 20th will be retained until the end of May 20th after which point those records will be destroyed or overwritten.
- All customer Genesys Cloud Platform Data will be purged upon contract termination with a 30-day grace period, whether or not the data has reached its maximum retention period.
- All data retention periods are subject to suspension if a Legal Hold notice is issued.
- If any part of the data is subject to regulatory guidelines regarding its retention, then the regulatory- or legally-mandated data retention period shall apply.
- The following table lists the default and maximum retention periods by Solution Category. Unless otherwise specified by contractual agreement, Genesys will apply the specified default retention period to all Solution categories.

14.3 Data Retention Period by Solution Category

				Default Retention	Max Retention	Data Usage	Options Past Retention Period
Customer Engagement	Inbound	IVR	Call Flow Data	90 days	36 months	Real time analysis & troubleshooting	Download available - GIM BI
		Voice Routing and Traffic	UCS Contact Profile	End of Contract	End of Contract	Customer contact data	N/A
		Post Voice Call Survey	Response Data	90 days	36 months	CX analysis	Download available - GIM BI
		Private and Group Voicemail	Message Media	End of contract	End of contract	User managed messaging	N/A
	Digital	Email / Chat	UCS Interaction History (Transcripts, etc.)	90 days**	90 days**	Best practices	Download available - CDDS
	Outbound	Voice	Campaign (Calling) List	72 hours	72 hours	List refresh	Download available
			Call Results (Detail records)	16 months	16 months	Success rate	Download available
	Self Service	Enterprise IVR	Call Flow Data	90 days	36 months	Real time analysis & troubleshooting	Download available - GIM BI
Employee Engagement	WFO	GIR	Voice Recordings	13 months*	End of contract*	Compliance & legal purposes	Download available
			Screen Recordings	13 months *	End of contract*	Training and compliance	Download available
		QM	QM Evaluations	13 months	End of contract	Training	Download not available
			QM Reports	90 days	36 months	Required for QM/Training purposes	Store up to 3 years
		WFM	Forecasting, Scheduling, Reporting, Configuration, Calendar	36 months	60 months	Workforce trends	Store up to 5 years
	OmniChannel Desktop	Workspace	UCS Interaction History (Transcripts, etc.)	90 days**	90 days**	Best practices	Download available - CDDS
			UCS Contact Profile	End of Contract	End of Contract	Customer contact history	N/A
Business Optimization	Analytics	Historical Reporting	GIM data (includes Designer Call Flow data)	13 months	36 months	Trending and Performance analysis	Download available - GIM BI
	Platform	Designer	Analytics (Elastic Search)	90 days	36 months	Short term analysis & Call Flow tuning	Download available - GIM BI

*Storage charges apply from Day 1 of storage.

**Per interaction. All chained interactions (i.e., email responses) are kept until 90 days past the last interaction.

15 Wireless Out-of-Band Management

Genesys will permit customers to use wireless devices in Genesys data centers to provide out-of-band management of their equipment used to access the Genesys cloud service infrastructure subject to the following restrictions:

- Customers' wireless devices shall not be part of the Genesys cloud environment and placement of wireless devices will not be permitted in the Genesys cloud environment;
- Wireless devices, including antennas, must be located in rack space that Genesys designates for use solely by customers;
- Customer must lease rack space from Genesys pursuant to a Services Order;
- Customer is responsible for ensuring that it leases enough rack space to accommodate antennas for the wireless devices;
- Customers are responsible for procuring wireless services, including the determination as to whether such services are sufficient to meet customers' requirements;
- Customers are responsible for management and maintenance of the wireless devices;
- If a customer requires changes to wireless devices that necessitates any changes to the wireless equipment, Genesys shall charge customer for such support on a time and materials basis;
- If a customer requires access to its wireless devices in the data center, such access shall be subject to Genesys's policy, including but not limited to the requirement that customer personnel be escorted by Genesys or a Genesys representative;
- Genesys reserves the right to impose additional reasonable requirements and/or fees based on customers' use of wireless devices; and
- Genesys shall have no liability to customers with respect to the use of wireless devices for out-of-band management, including any outages or equipment failures affecting the wireless devices and/or customers' ability to remotely manage their equipment.

16 Support

Please refer to the Support Guide. Note that from time to time the service itself may include certain communications from Genesys such as service announcements, administrative messages, and notices. To that end, the customer acknowledges and agrees that such communications are considered part of the service, and the customer will not be able to opt out of receiving them.