



PUREENGAGE CLOUD
USER GUIDE

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1 About this User Guide Overview

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 architecture leverages the world-class SIP-based Contact Center and Genesys Voice Platform (GVP)/Media Services products at the Services' 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 of standard capabilities will support 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 includes Amazon Web Services
- Service offers including MPLS and various TELCO providers; customers may have the options 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 Customer Engagement Services

3.1 Inbound

3.1.1 Interactive Voice Response (IVR)

Inbound voice IVR service includes standard DTMF signaling. Advanced options including Text to Speech (TTS) and Automatic Speech Recognition (ASR) are also supported.

3.1.2 Voice Routing and Traffic

Using operational parameters and rules, qualified Users, i.e. 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.

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 will require either a Move/Add/Change/Delete (MAC/D) Services Order (placed with Customer Support) 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 (a.k.a. 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.

3.1.3 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.

3.1.4 Private and Group Voicemail

Genesys Voicemail enables voicemail functionality currently at a Group level and at a Personal level. Voicemail has features that 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.

3.1.5 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.

3.2 Digital Channels

3.2.1 Email and Chat

The Service provides a set of Digital Channel capabilities designed to support email and chat. A set of web-based interfaces allows Users to easily configure how interactions should be managed. Examples include performing basic categorization based on caller profile and standard text analysis on message

content. For the email option, Administrators can easily configure auto-acknowledgement messages and auto-responses. Agent Desktop provides User access to a set of standard responses for all interaction types, thus allowing efficient and consistent responses to caller inquiries.

Using Genesys Professional Services, you can enhance your email and chat routing applications to include more complex routing rules and advanced capabilities such as natural-language content analysis. These additional options can be used to drive customer satisfaction and better agent performance through higher degrees of message analysis and improved auto and suggested response options.

3.2.2 Web Callback

Web Callback allows end consumers to click on a “request callback” link on a website, input data on a webform, and request a callback from 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 your customers’ needs.

3.2.3 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.

3.3 Outbound

3.3.1 Voice

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 allows 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.

3.3.2 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.

Routing customer replies to an agent is not supported for SMS, but customer responses to proactive email messages can be routed to an appropriately skilled and enabled agent to continue the conversation using the Digital Channels Email solution.

3.4 Self-Service

3.4.1 Enterprise IVR

The Cloud Enterprise IVR solution delivers rich self-service IVR capabilities. Genesys provides this Service offering based its own widely-deployed Voice XML 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 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.

4 Employee Engagement Services

4.1 Workforce Optimization

4.1.1 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, the system makes it easy to get started with WFM. Users can see their current schedules through a standard web-based interface and 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.

4.1.2 Genesys Interaction Recording, Screen Recording and Quality Management

Call Recording Service. To address the needs of both liability and quality recording, Users can record either all calls into the Service or just a portion. Call recordings can be based on standard telephony information or call routing data. For example, a Customer, under its sole control, could choose to record only “platinum customer” calls. All relevant Customer Data, chosen by Customer to be collected, is also stored with the recording, allowing search capability of the recordings. For example, Customers 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 be administered to trigger a pause during the collection process so that, for example, the credit card information is not recorded. Users can access call recordings from any location with secure network connectivity.

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

Quality Management Service. 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.

4.2 Omni-channel Desktop

4.2.1 Agent Workspace

The Service provides a web-based Genesys agent desktop (“Agent Desktop”) that supports a variety of Customer interaction channels. Using the desktop, 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. Examples of options include:

- Providing a screen pop with the relevant attached data, including the ability to pass this attached data to a defined URL
- Displaying caller interaction history on recent interactions (for the purposes of this Service Overview, “callers” refers to those interacting via telephony, chat, or other methods or mediums)
- Displaying User and Service statistics

- Setting Not Ready Reason codes and Disposition codes

4.2.2 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

4.2.3 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, as well as, click-to-dial outbound voice calling.
- To support Inbound Email and Outbound Voice Dialing Campaigns Agent will require access to extended set of functionality. In this case, a fully featured Genesys Agent Desktop (WWE) should be deployed with Salesforce.com in a *Console Mode*. Please contact your Genesys representative for details.

5 Business Optimization Services

5.1 Analytics

5.1.1 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 can be saved to the desktop for off-line 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 Customer’s business requirements.

5.2 Integration

5.2.1 WWE Service Client API

The WWE Service Client API can be used by 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.

5.2.2 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
- Agent, Queue, Call Flow and Interaction metrics across all channels from Infomart
- Voice and Screen recordings and metadata

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

5.3 Platform

5.3.1 Parallel Test Environment

The Cloud Parallel Test Environment (PTE) is a logically partitioned environment within a customer production tenant that allows 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 DID, replication of Customer’s production voice call flows, provisioning of unique agents, Administration tools, and Reporting.

Separate Implementation Fee¹, Provisioning Fees² and Usage Fees³ will be assessed to provision and maintain the Cloud Parallel Test Environment.

5.3.2 Infrastructure

Genesys will be 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 telecomm services, load balancing, disaster recovery, capacity management, and more. Genesys' role and responsibility shall be further subject to the Support Guide.

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

5.3.3 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
- Support interfaces – used by authorized Contact Center administrators to submit requests with Genesys Customer Care and to view service status and schedule

5.3.4 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

5.3.5 Designer (Voice)

Genesys Designer for Voice 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 survey and immediate and scheduled callback. This same user tool also provides support for managing operational parameters and announcements.

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.

5.3.6 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 PC's or tablets.

- Supported Operating Systems: Windows 7 or 8, 32-bit or 64-bit
- Citrix Version: Citrix Receiver 3.3
- Supported Browsers:
 - Microsoft Internet Explorer® 10+ or
 - Chrome™ web browser version 38+ (exception: historical reporting is not supported on Chrome)

There are no drivers, applets or any other downloads that 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).

For more detailed list of supporting OS and Browsers, please refer to the following Genesys documentation⁴:

[Genesys Supported Operating Environments Guide](#)

5.3.7 Telecom Architecture

User access to the Service will be the responsibility of the Customer. Customer will provide bandwidth and availability based upon minimum requirements made known to Customer by Genesys.

5.3.8 Supported Phones

5.3.8.1 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+)

⁴ The referenced document covers all Genesys products, and includes items that are not currently available in the Genesys Cloud offer.

5.3.8.2 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

6 PureEngage Cloud Data Retention Policy

6.1 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, back-up tapes, optical discs, CD-ROMs, DVDs, electronic mail (commonly referred to as 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.

6.2 Policy

1. 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.
2. 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.
3. All data retention periods are subject to suspension if a Legal Hold notice is issued.
4. 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.
5. 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.

6.3 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 not available
	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 not available
			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

7 Support

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