



PureEngage Cloud Customer Care

Support Guide

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# 1 PureEngage Cloud Customer Care

PureEngage Cloud Customer Care is focused on your experience through a global, live answer 7x24x365 PureEngage Customer Care model. This document will focus on defining Case Severity levels, target Response and target Resolution times, Root Cause Analysis, and the PureEngage Cloud Customer Care Response Policy which enables PureEngage Customer Care to provide the customer with the most effective and efficient experience possible.

Support is provided in accordance with the terms and conditions defined in the Genesys Master Cloud Subscription Agreement\*, as well as terms defined in this document and commonly recognized in the technology industry.

*\*Your Genesys Master Cloud Subscription Agreement may differ from this document in some areas. In this case, the Genesys Master Cloud Subscription Agreement will take precedence.*

| PureEngage Cloud Customer Care Offering | <a href="https://docs.genesys.com/Documentation/Cloud">https://docs.genesys.com/Documentation/Cloud</a> |
|---|---|
| Resource Center                         | <a href="https://docs.genesys.com/Documentation/Cloud">https://docs.genesys.com/Documentation/Cloud</a> |
| My Support Web Portal 24x7x365          | Refer to Section 3.1  |
| Phone Support 24x7x365                  | Refer to Section 3.2  |

## 2 Definitions

- **Designated Contact:** A named customer resource who has permission to open cases on behalf of the customer. See also section [Case Management Designated Contacts](#).
- **Resolution:** A case that has been opened, for any level of severity, has been fully resolved.
- **Response:**
  - When a new Case is submitted, it is first assessed by a Customer Care Analyst to ensure the issue is clear and all necessary information has been provided.
  - An email response will be sent to acknowledge that the Case has been received and is now being Assessed
- **Root Cause Analysis (RCA):** Following an Incident Case, Genesys will prepare and deliver a Root Cause Analysis document via the Support Case. This document will include a description of the issue, times and durations of impact, when the issue was resolved with service restoration, and confirmation of steps to ensure the issue is addressed and will not reoccur.
- **Software Defect:** A design or coding characteristic which hinders its usability for the purposes for which it was designed.

### 3 Contacting Customer Care:

Please use one of the following methods to contact Customer Care. Remember that only your **Designated Contacts** can open, update and close cases.

#### 3.1 On Line

##### **My Support**

Open and manage cases by logging into the Genesys Customer Care Portal, My Support, using the URL <http://www.genesys.com/customer-care> OR from your Genesys Cloud portal.

For instructions on using My Support, please refer to the [Case Management](#) section.

#### 3.2 Telephone

Customer Care Telephone Numbers:

Please remember that Customer Care provides telephone Support 7x24, 365 days a year.

The phone number have been provided below for your reference. For the most up to date numbers please use the URL provide below:

<https://genesyspartner.force.com/customercare/CustomerCareContactUs>

| North America (USA & Canada) |                      | Latin America               |                  |
|------------------------------|----------------------|-----------------------------|------------------|
| International                | +1-506-674-6767      | International (** NEW**)    | +55-11-4040-4849 |
| Toll-free, N. America only   | +1-888-369-5555      | Toll-free, Argentina only   | +800-444-8420    |
| Europe, Middle East, Africa  |                      | Toll-free, Brazil only      | +08-00-8911-866  |
| International                | +44 (0) 127-645-7002 | Toll-free, Chile only       | 1-230-0201172    |
| Asia Pacific                 |                      | Toll-free, Columbia only    | 018005183954     |
| International                | +63-2-864-3333       | Toll-free, Ecuador only     | 1-800-000-272    |
| Australia only               | +61-7-3368-6868      | Toll-free, Mexico only      | 1-800-112-2660   |
| Toll-free, India only        | +000-800-100-7136    | Toll-free, Panama only      | 00800226-8420    |
| Japan only                   | +81-3-5989-1450      | Toll-free, Paraguay only    | 009800110097     |
| Japan; critical issues only  | +81-3-5989-1135      | Toll-free, Peru only        | 080077301        |
| Toll-free, Malaysia only     | +1-800-814-472       | Toll-free, Puerto Rico only | 18557078420      |
| Korea only                   | +82-80-822-1466      | Toll-free, Uruguay only     | 00040190763      |
|                              |                      | Toll-free, Venezuela only   | 08001362031      |

## 4 Case Management

### 4.1 Designated Contacts

Every Genesys customer must identify at least two contacts. These people will be given special permissions to interact with Customer Care on behalf of their organization. Customer Care calls them Designated Contacts. They are the only customer contacts permitted to open and manage support cases and service requests.

Using Designated Contacts safeguards the security of data and ensures we provide service and information about your account to contacts that should be representing your company. Assigning Designated Contacts to work with Customer Care also assists us in making sure that your contacts understand how to work with Customer Care effectively and are informed of critical Customer Care information.

Becoming a Designated Contact is easy: Go to

<https://genesyspartner.force.com/customercare/GenesysCommunityLogin>

and select “GET STARTED” to request a “My Support” account with Genesys.

*Please note: for resolution of Critical (Severity Level 1) issues, a Designated Contact must be available at all times to work with PureEngage Customer Care.*

### 4.2 Designated Contact Responsibilities

Customer contacts who are granted Designated Contact access permissions with Genesys Customer Care are expected to fulfill the following responsibilities.

- Must have a technical understanding of the contact center infrastructure and Cloud Deployment
- Must be adequately trained to use the Genesys products currently deployed.
- Must be able to provide an accurate description of the issue reported and its business impact.
- Must report each issue separately, so issues can be individually tracked to a successful resolution. Reporting multiple issues on one form or adding new issues into correspondence about an existing issue may result in problems being overlooked and not resolved.
- Must be available to work with a Customer Care Analyst to solve your issue.
- For Critical priority issues, a Designated Contact must be available at all times to work with Customer Care in resolving the issue.
- When a Customer Care Analyst requests information or provides recommended actions to solve an issue, the Designated Contact’s time to respond is to be aligned with priority for that Case.
- During investigation of a Case, if Genesys requests remote access to view the Genesys products in your environment through commercially available, customer-controlled, screen

sharing software, the Designated Contact must ensure that you follow your company's data privacy guidelines when sharing a remote view of your network with Genesys.

- Agrees to stay current on Genesys Customer Care processes and other news, including receiving and reading Genesys customer newsletters and Customer Care emails as well as notices on My Support.

## 4.3 Prerequisites to opening a case,

Before opening a case please do the following:

1. Confirm the issue to be addressed falls within the responsibility of the Customer Care Organization.
2. The table below provides clarity on items that are typically not managed by the Care team

| Type of Issue  | Who to Contact   |
|--|--|
| Genesys product pricing or quotations  | Your Genesys Customer Success Manager ( <b>CSM</b> )   |
| Questions about Genesys Education Services or Professional Services  | Your Genesys Customer Success Manager ( <b>CSM</b> )   |
| Problems with products or applications not implemented by Genesys (unless specifically designed and integrated into Genesys deployment by Genesys Professional Services) | The appropriate vendor. If a problem involves or impacts Genesys functionality, Genesys Customer Care will be pleased to work with you and the other vendors to resolve the issue. |
| Issues with custom-built software developed by a third-party integrator but not done as part of a Genesys deployment by Genesys Professional Services)                   | The third-party systems integrator   |

3. Gather the following information:

**Note:** The following template will be applicable for most support related issues. These may not apply to Questions or Service Request Cases.

| Description Section                 | Comments   |
|-------------------------------------|--|
| <b>Case Description:</b>            | <i>Problem Details including symptoms, User Experience, error messages etc.</i>  |
| <b>Site Information:</b>            | <i>BPO/Site Name where the issue is occurring</i>  |
| <b>Number (ANI) of the caller:</b>  | <i>If known, the ANI of a caller experiencing an issue should be provided. This can be from a test call or customer.</i>   |
| <b>Dialed Number (DNIS) called:</b> | <i>What number did the caller dial when the issue was encountered? This can be from a test call or customer. Genesys may also use this number to make test calls to replicate the issue.</i> |
| <b>Agent Information:</b>           | <i>If agents are affected, provide name and/or ID of at least one agent that experienced the issue.</i>  |
| <b>Date, Time, and Time Zone:</b>   | <i>As specifically as possible, what was the date and time (including time zone) of the issue or of the examples provided?</i>   |

| <b>Business Impacts Section</b>                | <b>Comments</b>   |
|--|---|
| <b>How many agents/users affected:</b>         | <i>If applicable, approximately how many agents, users, supervisors, or callers are affected?</i> |
| <b>Lines of Business affected:</b>             | <i>If applicable, which Lines of Business are affected?</i>                                       |
| <b>Impacts to Customers or Business Users:</b> | <i>How does this affect callers or application users?</i>   |

**Service-Specific Information:**

| <b>Cloud Service</b>   | <b>What Information does Genesys require?</b>   |
|--|---|
| <b>Agent Desktop</b>   | <ul style="list-style-type: none"> <li>• In which region is the issue occurring?</li> <li>• Are all/some agents affected?</li> <li>• If you try logging in on a different PC, does it work? Or try logging in with a different agent on the same PC?</li> <li>• Error message + screenshot</li> <li>• Agent ID, time, and time zone</li> <li>• Attach Browser log (if applicable) - F12 in Chrome before reproducing the issue</li> </ul> |
| <b>Call Back</b>   | <ul style="list-style-type: none"> <li>• What is the exact time of the call with time zone?</li> <li>• Is this a new or existing application (Has it ever worked before?)</li> <li>• Desired vs actual behavior (scenario)</li> </ul>   |
| <b>Call Recording</b>  | <ul style="list-style-type: none"> <li>• In which region is the issue occurring?</li> <li>• Call(s) in question (ID/DNIS/ANI/Time + Time Zone)</li> <li>• Supervisor / Agent ID</li> <li>• Has this ever worked before?</li> <li>• Screenshot from SpeechMiner</li> <li>• Permission for Genesys Customer Care to listen to the call (if applicable)</li> </ul>   |
| <b>Chat / Email / Co-Browse</b>                                | <ul style="list-style-type: none"> <li>• In which region is the issue occurring?</li> <li>• Is this a new or existing application (Has it ever worked before?)</li> <li>• Desired vs actual behavior (scenario)</li> <li>• Examples of good and bad contacts</li> <li>• Exact time of the call with time zone</li> </ul>  |
| <b>Configuration Environment (Agent Setup, Platform Admin)</b> | <ul style="list-style-type: none"> <li>• In which region is the issue occurring?</li> <li>• Is this a new or existing application (Has it ever worked before?)</li> <li>• Desired vs actual behavior</li> </ul>   |
| <b>IVR</b>   | <ul style="list-style-type: none"> <li>• In which region is the issue occurring?</li> <li>• Is this a new or existing application (Has it ever worked before?)</li> <li>• If appropriate, the exact time of a call with time zone of the issue</li> <li>• How to replicate (if possible)</li> <li>• Clear description of caller/agent experience</li> </ul>   |
| <b>Network</b>   | <ul style="list-style-type: none"> <li>• Are any Error Messages seen by the agent?</li> <li>• Error message + screenshot</li> </ul>   |

| Cloud Service               | What Information does Genesys require?   |
|-----------------------------|--|
|                             | <ul style="list-style-type: none"> <li>• Describe the scenario where the issue is seen</li> <li>• Are agents affected? How many?</li> <li>• Is the issue reproducible?</li> </ul>  |
| <b>Outbound</b>             | <ul style="list-style-type: none"> <li>• Is this a new or existing application? (Has it ever worked before?)</li> <li>• Desired vs actual behavior (scenario)</li> <li>• Good and bad call examples</li> <li>• Exact time of the outbound call with time zone</li> <li>• DNIS, ANI, and agent's DN (if applicable)</li> </ul>  |
| <b>Reporting</b>            | <ul style="list-style-type: none"> <li>• In which region is the issue occurring?</li> <li>• Screenshot of the issue (+ time with Time Zone when it was made)</li> <li>• Desired vs actual result</li> <li>• Screenshots from other subsystems that reporting is compared to</li> <li>• Supervisor name</li> <li>• Has this report or widget ever worked before?</li> </ul> |
| <b>Routing</b>              | <ul style="list-style-type: none"> <li>• Is this a new or existing application? (Has it ever worked before?)</li> <li>• Desired vs actual behavior (scenario)</li> <li>• Good and bad call examples</li> <li>• Exact time of the call with time zone</li> <li>• DNIS, ANI, and agent's DN (if applicable)</li> </ul>   |
| <b>Telephony</b>            | <ul style="list-style-type: none"> <li>• Are any Error Messages seen by the agent?</li> <li>• What is the call scenario where the issue is seen?</li> <li>• Are agents affected? How many?</li> <li>• Is the issue reproducible?</li> <li>• Please provide one or more DNIS/ANI/Agent ID for a problematic call (preferably within the last 12 hours)</li> </ul>           |
| <b>Workforce Management</b> | <ul style="list-style-type: none"> <li>• In which region is the issue occurring?</li> <li>• Screenshot of the issue (+ time with Time Zone when it was made)</li> <li>• Scenario to reproduce</li> <li>• Has this ever worked before?</li> <li>• Desired vs actual result</li> <li>• Supervisor login</li> <li>• Java warnings/errors</li> <li>• Browser used</li> </ul>   |

Also note the following:

- Please provide any addition information that may be helpful in the management of the issue, such as configuration files, screen shots of errors, and console logs.
- Report all each issue separately to allow for individually tracking and successful resolution.
- For resolution of Critical (Severity Level 1) issues, a Designated Contact must be available at all times to work with PureEngage Customer Care.

## 4.4 Case Types, Priorities, and Statuses

**Case Types:** The following Case Types are available for Designated Contacts to create and submit:

| Case Type   | Case Sub-Types      | Description   |
|---|---------------------|---|
| <b>Support:</b><br>For issues or questions about Genesys products, services, or platform.                                       | Problem             | For issues that affect or may affect your customers, agents, or business. Issues can be in a production or pre-production environment.  |
|   | Question            | For questions that may or may not be related to an ongoing issue with your service. This may include inquiries about product functionality or usability or a follow up question on a previous Problem Case. |
| <b>Service Request:</b><br><br>For change requests, Move/Add/ Change/Delete (MACD) requests, new facilities, or new deployments | Add/Remove Access   | Change permission levels for one or more users, delete, or add agents/supervisors/administrators.   |
|   | Password Reset      | Login issues or requests to reset passwords.  |
|   | Change Request      | Add Routing Points, Toll Free Numbers, change existing routing applications, etc..  |
|   | New Project Request | Add a site to an existing contact center, add new products or functionality, or major changes existing deployments.   |
| <b>Data Privacy Request:</b><br><br>For GDPR requests only.   | N/A                 | GDPR stands for General Data Protection Regulation and grants EU citizens a number of rights on how their private data is to be handled and safeguarded.  |
| <b>Admin:</b><br><br>For issues or questions that do not involve a component associated with your Cloud Deployment              | Question            | Any general question not related to a product.<br>Example: Questions about how to use the Support Portal.   |
|   | Request             | Create new Designated Contacts, remove Designated Contacts, etc..   |
|   | Problem             | Problems with access to the Support Portal.   |

## 4.5 Case Severity Levels (Definitions and Examples)

### Incident

An event where agents and consumers cannot communicate using real time communication channels. Real time communication channels are defined as voice and chat contacts. This case requires immediate resolution to resolve.

**Example:** Calls made to the toll-free numbers are ringing fast busy and not routing to agents therefore our agents are not able to answer phone calls

### Critical

An issue where the agent and consumer can use the Genesys service, but the service is degraded, resulting in a severe impact on business operations. This condition requires fast resolution, but the overall platform is operational.

**Example:** Phone calls received on toll free number 1-800-123-4567 are answered by agents, but voice quality is inconsistent, and the calls cut in and out making it hard for the phone agents to speak with customers.

### High:

An issue where the Genesys service overall is usable, but some critical features maybe unavailable.

**Example:** When using real time reporting, Pulse, the statistics are not populating. Real time reporting is important to our business and is required to appropriately manage queues and agent schedules.

### Medium:

An issue where the Genesys service is usable, but some features (not critical to operations) are limited.

**Example:** When running historical report "Test Report" we are not seeing data in the answer column.

### Low:

An issue where the Genesys service is usable and the issue does not significantly impact operations, or that a reasonable workaround has been implemented.

**Example:** We experienced a number of dropped calls today and are not sure why.

## 4.6 Opening a Case via the Web Portal

1. Navigate to the Genesys Support portal using one of the two methods below:
  - In your web browser, visit your "My Support" page, or
  - On your Genesys Cloud Portal, navigate to the Support section and click on the "Genesys Customer Care" application icon.
2. Click on "Dashboard" from the top menu
  - Note, depending on your Designated Contact profile, you may need to select "PureEngage Cloud" from the drop-down list of available platforms. This only pertains to Designated Contacts that have an On-Premise deployment in addition to a PureEngage Cloud deployment.
3. From the Dashboard, click on the "Cases" icon, from there, you can Open a Support Case, open a Service Request, open a Data Privacy Request, View and Manage Cases, or access Support Information
  - Select your Cloud Deployment name (usually your company name)
  - Select the affected service related to the Case and click Next
    - Specify the Case Type
    - Specify whether the issue was found in a Production or User Acceptance Testing (UAT) stage
    - Provide a meaningful Subject to summarize the issue or request
  - Provide a detailed Description of the issue or request. Please be sure to include all applicable information that will help Genesys understand and isolate the issue. Specific information required for most issues is specified in the "Before You Contact Customer Care" section above.
  - Select the Case Priority
  - Provide a detailed Business Impact to help Genesys Customer Care understand how the issue is affecting your business
    - Optional – Add the number of affected agents/ports/customers (Problem Cases Only)
    - Optional – Add an External Reference number.
  - Click Save to create and submit the Case

**Note:**

A new case cannot be created via email.

An existing case can be updated via email,

To update an Existing Case by email, simply reply either to:

- (a) the email that you received from the care analyst
- (b) to an automated Case notification.

(An email that originated from a Case includes a special Reference ID, which ties any reply back to the Case.)

## 4.7 Opening a Case by Telephone

Genesys recommends that our customers create Cases via the Web Portal to ensure all details are clearly articulated so that the troubleshooting process can begin. However, in urgent situations such as a service outage or a critical situation, please call Customer Care to report an issue. Genesys Customer Care will open and submit the new Case while you are on the phone.

- [Click Here](#) for Cloud Contact Information
- Please identify yourself, the company you are representing, and ensure you have a clear description of the problem so that the Case can be quickly created and assigned to a Customer Care Analyst.

**Important:** A Case Number will be provided for tracking purposes. Please provide this Number during all correspondence or communication with Customer Care as it will be required during the investigative and resolution process. Customer Care will also reference this number when they contact you to assist with the Case.

## 4.8 Closing a Case

You can close a Case at any time by accessing the Case on My Support and clicking "Close Case."

If Customer Care requests information about a Case or proposes a solution, and you do not reply within two business days, the Case Management system will send you an automated email reminding you about the requested action. If you do not respond to the reminder within ten business days, the Case will be automatically closed. See the Auto Follow-Up tab on this page for further details regarding Case closure through the Auto Follow-Up Process.

## 4.9 Auto Follow-Up Service

The Auto Follow-Up Service is designed to provide timely and proactive follow-up between Customers and Customer Care. Auto Follow-Ups will be sent to the Designated Contact who opened the Case according to the process outlined below.

- **Auto Follow-Up #1:** When Customer Care notifies you and requests a response (e. g. proposes a solution or requests information) regarding an open Case, a follow-up timer is started. If you do not respond to the request within two business days, an automated Email is sent to the Designated Contact who opened the Case, with a reminder of the requested action, and a link to access the Case.
- **Auto Follow-Up #2:** If we don't hear back from you within five business days, a second automated Email is sent to the Designated Contact who opened the Case. This email contains a reminder of the requested action, and a link to access the Case.
- **Auto Follow-Up #3:** If we don't hear back from you within ten business days, the Case is automatically closed, and a final Auto Follow-Up Email is sent to the Designated Contact who opened the Case. All information about the Case will remain intact in My Support for one month (including any sanitized logs or attachments).

**Note:**

The Auto Follow-Up timer can start and stop several times for a given Case based on the changes to the Case status.

## 4.10 How to Find Your Open Cases

Use the My Cases page: select My Cases from the top navigation menu and click on the Case Number.

The My Cases page allows you to easily view all "Non-Closed Cases" raised against ALL Case Types in which you are named as the Case Contact. By default, only 5 records will display. To see more, select the Show More object on the bottom of the list where the next 5 records will be displayed. If the Show More object is still available, there are still more records available.

Use the Case Search option: You can enter your "Case number or keywords" in the Case Search box available from most pages via the dual search box.

## 4.11 Re-Opening a Case

You can re-open a Case using one of the two following methods:

- Call Customer Care and request the Case be re-opened, or
- log into My Support, go to your dashboard, select Cases, select Manage and View Cases, view My Closed Cases or All Closed Cases, then select the case and click "Request to Re-open" at the top.

With both options, please ensure you provide supporting information demonstrating the issue has not been resolved.

*Note:* Cases that were closed for 30 or more days cannot be re-opened.

## 5 Service Level Targets

### 5.1 Response Times and Service Level Targets

For definitions (including examples) of Severity Levels refer to [Severity Levels and Examples](#) section provided early in the document.

| Incident       |  |   |   |
|----------------|--|---|---|
| Severity Level | Response Target  | Restoration Target  | Resolution Target                                       |
| Incident       | Customer must <a href="#">call</a> to declare Production Incident (Avg. response <1 min)           | 15mins<br>(Incidents are worked in real time until Service is Restored) | Delivery of RCA<br>5 business days<br>(7 calendar days) |
| Cases          |  |   |   |
| Severity Level | Response Target  | Resolution Target   |   |
| Critical       | Customer must <a href="#">call</a> to escalate an existing Case to Critical (Avg. response <1 min) | 24 Hours*   |   |
| High           | 2 business hours   | 2 business days*  |   |
| Medium         | 4 business hours   | 5 business days*  |   |
| Low            | 1 business day   | 10 business days*   |   |

- The Incident Resolution Target time listed above includes the time duration to produce and deliver the RCA following an incident.
- Restoration Target time and RCA's are applicable only for an incident.
- The Case Resolution Target times listed above are for the time duration that the case is with the care team and does not include the time the Care team is waiting for additional information from the customer. Time for resolution does not include the time duration the Case is in 'Awaiting Information' status, nor the 'Solution Proposed' status.
- \* The Genesys goal is to resolve greater than 80% of the cases within the Resolution Target times.

- Cases that are for software defects typically require an application level code changes, these changes are controlled by product/software release cycles and are not subject to the target times above. The Care team will inform you when a case requires an application level code change. Genesys engineering teams will work to resolve these issues as quickly as possible and will provide updates and ETA's as they become available.
- The Genesys Care team will also seek out and provide alternate solutions if available to address the issues. The alternate solutions may be used while the software defects are being addressed by the engineering teams.

## 6 How to Escalate a case

If there is a concern regarding a My Support Case that requires Genesys CARE Management assistance, please follow the steps outlined below:

1. Requesting escalation via the case:
  - Provide an update in the case, requesting management escalation.
  - Include “Escalation Request” in the first line of the update.
  - Provide a clear and concise description of the issue and the impact to your business to help the Care team prioritize the case appropriately.
2. Contact your Technical Account Manager (TAM)
  - If you do not have a TAM, proceed to step 3.
  - Your TAM will work directly with the Care team to address the concerns.
3. Email PureEngage Cloud Management
  - Email address: [PureEngageCloudManagementAttention@genesys.com](mailto:PureEngageCloudManagementAttention@genesys.com)
  - Include the following:
    - Case number in the subject line.
    - Clear and concise description of the issue and the impact on business to help the Care team prioritize your case appropriately.

**Please use the following guidelines when escalating a My Support Case:**

- For Priority/Severity 1 technical issues or requests, please contact Customer Care on any of the [Support IVR numbers](#) listed in the table below
- Please do not escalate based on a change in urgency/impact; to change the priority of a case to a higher status based on a greater need for urgency or broader impact, please work with the case owner to discuss and change when appropriate.

## 7 Incident Management:

A Cloud Incident is any production impacting situation that requires immediate service restoration. Cloud Incidents are characterized by their level of severity, the duration of the service interruption, and the extent of the impact felt to your customers or business.

For example, a Cloud Incident may involve a situation where:

- large numbers of callers are disconnected before reaching agents,
- a group of agents are suddenly disconnected and are unable to log back into their Agent Desktop, or
- a group of agents lose the ability to handle emails or chats over an extended period of time.

Genesys Customer Care treats Cloud Incidents with the utmost urgency. Although Genesys Cloud Services are closely monitored for service interruptions by our Network Operations Center (NOC), it is possible for customers to experience a Cloud Incident before Genesys can take action to restore it. In these cases, we ask that you immediately contact Genesys Customer Care to report the issue. Please inform Genesys of the issue and provide the following details:

- How is your service affected?
- Which services/components are affected?
- When did you first notice the issue?
- If known, are all agents, callers, or users affected?

This information helps Genesys troubleshoot the issue and narrows down potential sources of the service interruption.

Once you have reported the incident to Genesys Customer Care, the following steps will be taken to restore your service:

- The Network Operations Center (NOC) is immediately notified in real time of the incident, and the services that are affected
- An internal Incident bridge is opened, with participation from all teams responsible for the PureEngage Cloud Platform. An Incident Commander is on duty at all times and is responsible for and coordinating restoration efforts until service is restored.
- The Customer Care Analyst is responsible for communicating with you and will be in phone contact with you as necessary
- Incident Notification emails will be delivered when an incident is detected and every 30 minutes thereafter to provide current status, next steps and any other pertinent information
- When service is restored, you will be notified in the Product Support Case and/or by phone based on the severity of the incident

Once the customer confirms that service is restored, the Product Support Case will be updated and the investigation into the Root Cause will commence. If requested in the Case by the customer, a Root Cause Analysis (RCA) document will be provided within 5 business days in the related Case. Once the RCA is delivered, the Product Support Case will be moved to Solution Proposed.

## 8 Root Cause Analysis and Preventative Measures

A Root Cause Analysis and preventive measures document is completed after an incident and is generally delivered within 5 business days from the time of resolution. See [Incident Management](#) section of this document.

## 9 Disaster Recovery:

Genesys Cloud platform is architected with intrinsic resiliency capabilities in order to support all types of catastrophic events that could lead to a disaster situation. In addition to the high availability features and capabilities of the Genesys Cloud architecture, the deployment leverages the distributed nature of the platform to offer disaster recovery capabilities at the global level. Disaster Recovery is manually initiated by Genesys. Through its different service centers, the Genesys Cloud platform allows prompt service restoration in the case of any situation suffering from a catastrophic event.

Different catastrophic events affect contact center in different ways. In some scenarios Agent Desktop, such as Workspace.web (WWE) or Telephony Toolbar (desktop based on the GWS 9 API), can lose connection to Genesys Web Services; other scenarios can affect voice communications.

Our Customer Care organization will be responsible to support a customer's conversion to the DR site if this situation may be required.

A full DR Test plan and Managed Switchover will be delivered to our customers during the Implementation phase of the project. This will be tailored to the specific environment and architecture of the customer.

## 10 Notifications:

Email notifications are sent by Genesys for any of the following reasons:

### Planned Maintenance:

- Sent for major product upgrades or changes that may cause temporary service interruptions during maintenance activities
- Email sent 7-14 days prior to the start of the maintenance activity.
- Includes a unique reference number that can be used to make inquiries for more information if needed
- Any potential service impacts will be identified
- Approximate timing of the maintenance will be included in the email
- All times listed refer to the local time zone of the customer receiving the notification

### Emergency Maintenance

- Emergency Maintenance that requires a notification is done only when necessary to prevent or restore a service impacting incident
- Email may be sent with short notice – (typically 1-3 days but may be under 1 day depending on impacts)
- Usually only affects one customer
- Includes a unique reference number that can be used to make inquiries for more information if needed
- Any potential service impacts will be identified
- Approximate timing of the maintenance will be coordinated with the affected customer(s) and will be included in the email
- All times listed refer to the local time zone of the customer receiving the notification

### Incident Alerts:

- Email notification will be sent as soon as impact is detected to advise that Genesys is aware of a potential service-impacting incident
- Notification will include as much information as is known at the time, including a brief description of the issue, possible impacts, activities underway to restore service, and recommendations on ways to minimize impacts (example - have agents log into their Emergency Desktop)
- Notification may not apply to all customers that receive it
- Follow-up notifications will be sent every 30 minutes to advise on current status
- Follow-ups will continue until the incident is restored and the all-clear is given. This will include instructions on how to return agents to usual operations if applicable

### Product or Security Advisories:

- Email notification to advise customers of potential product defects or possible security vulnerabilities are very rare.
- Advisories will provide details of the issue, possible impacts, and a link to further information.

If you are not receiving notifications, please submit a Support Case and provide Genesys with an email distribution list that contains the individuals within your organization that should receive the notifications. We will add associate the Distribution List to your organization so that the notifications applicable to your company can be delivered.

## 11 Additional Resources

### 11.1 Documentation

Genesys documentation and Knowledge Base articles can be accessed from your My Support portal. Only users with My Support access can view and download this information.

Be sure to click on the “Genesys Cloud Content” to find documents relevant to PureEngage Cloud.

Product Documentation for Cloud subscribers is not available from the My Support Documentation site. For Product documentation, simply visit your Genesys Cloud portal and click on the “?” icon in the very top right corner of the portal. A dropdown list of product and process related documentation will be available.

### 11.2 Community

The Genesys Customer Care Community site provides access to customer forums and other interactive features. The Customer Care Questions Forum is designed for Genesys customers to have active discussions on technical topics.

To access the forum, login to My Support and click the Community tile. The first page will take you to the Questions Forum. If you need more help, please open a Case. Customer Care is always happy to answer your questions.

### 11.3 Genesys Care Mobile App

The Genesys Care Mobile Application delivers the convenient ability to view and manage Cases from your mobile device (iOS and Android).

For more information, please visit the [Genesys Care Mobile App Guide](#) on our Documentation site at:

<https://genesyspartner.force.com/customercare/GenesysCommunityLogin>

## 11.4 Platform Availability Calculation

In the rare instance where the Genesys mission critical services falls below the individual customers Service Level Agreement, the customer is entitled to a credit in accordance to their respective MSA's. Genesys defines mission critical applications as follows:

- Phone Calls
- Chat Sessions
- Agents (voice or chat)

To determine the monthly availability, Genesys uses the number of agents impacted in the formula:

Cloud Availability:  $100\% - ((\sum \text{of each impact for the month} (\text{Affected Agents} * \text{Affected Duration})) / (\text{Total Agents} * \text{Minutes-in-Month}))$

Where:

- Each impact this month: includes the impact of each Incident to this Customer.
- Minutes-in-Month: a total time during the reported month that a Service should be up. 24h/7d or 43,200 minutes available in a month.
- Affected Duration: is calculated based on the Enterprise Data Warehouse populated from Genesys Cloud Incidents Tracker.
- Affected Agents: determined by the count of those agents on the platform that have either shown signs of multiple login's during an event, (usually a sign of degradation or log off) or that were part of a full outage which would mean all of the agents that were logged in prior to event are counted as impacted for the duration of the impact.
- Total Agents: The maximum number of unique Agents in a given day for this Customer considered across all days in the month.