



PureConnect®

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PureConnect Licensing

Technical Reference

Abstract

This document describes the system management for licensing PureConnect products. It includes steps for managing license information using the Genesys License Management website and allocating licenses using Interaction Administrator.

For the latest version of this document, see the PureConnect Documentation Library at: <http://help.genesys.com/pureconnect>.

For copyright and trademark information, see https://help.genesys.com/pureconnect/desktop/copyright_and_trademark_information.htm.

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Introduction to PureConnect Licensing

The *PureConnect Licensing Technical Reference* describes the acquisition, allocation, and management of PureConnect product licenses.

PureConnect licensing has two major categories:

- **License model**, which impacts how you pay for the product.
- **License types**, which determine how PureConnect controls the features, capabilities, access, and usage limits.

License Models

License models impact how you pay for PureConnect products.

PureConnect has two license models:

- **Perpetual** - Legacy licensing model where all product features install at once and you decide when to activate them by allocating the licenses.
- **Subscription** - Introduced in PureConnect 2018 R2 Patch 2

Starting January 1, 2020, Genesys only offers the subscription model. Existing customers can continue to use perpetual licenses; however, Genesys recommends converting to the subscription license model. For more information about converting to the subscription license model, contact Genesys Customer Care.

Perpetual license model

A perpetual license is the 'traditional' model for purchasing software. You pay for your software license upfront and have the right to use it indefinitely. On top of the license fee, you have the option to pay for one-off implementation services and a support contract, which renews annually.

If your environment has multiple servers, allocate the appropriate licenses for each server separately.

Subscription license model

Starting with PureConnect 2018 R2 Patch 2, a subscription license model is available to on-premises customers. PureConnect collects usage data for subscribers in encrypted files and the data uploads automatically to AWS S3, or customers can upload the data manually. For more information about data uploading, see [Appendix A: Subscription Billing Usage Data](#).

In the subscription model, how you use the system each month of the year impacts your bill. The usage subsystem tracks which users log on and their assigned licenses to determine usage. An understanding of user license assignment is critical for operating in the subscription model. For more information about each license, see [License Types](#).

Subscription license scenario

There's no limit to the number of licenses available or the number of licenses that you can use; regardless of whether you're using the assignable or concurrent allocation method. Counting and processing occurs in MyCloud. Nothing stops multiple users from logging on at the same time when peaks in demand occur, unless you manage how you bill out your licenses in MyCloud. For more information about accessing and using MyCloud, see the [MyCloud Self-service](#) documentation.

Support for virtualized deployments

Subscription customers with PureConnect 2020 R2 or later can install and run PureConnect in a fully virtualized deployment. Genesys removed the hardware dependencies associated to the HostID property of the perpetual license file. If you meet the requirements of pairing to Genesys Cloud and having the appropriate license file, you can deploy CIC servers and Media servers on virtual platforms. For more information, see the [CIC Virtualization Technical Reference](#).

License Types

License types determine how PureConnect controls the features, capabilities, access, and usage limits. PureConnect's all-in-one nature means that most features and capabilities are on the server and ready for activation. To turn on a feature or capability, you only need the appropriate license.

License levels

PureConnect licenses have various levels that indicate whether a server is a production server or another type of server. The license type also dictates expiration behavior, production behavior, or system re-registration behavior.

Production

License that allows the use of all purchased features in a production environment. Production licensed servers request re-registration after one year.

Development

License or bundle of licenses that allows the creation of a development or test environment. You cannot use this license type in a production environment.

Non-ordered development

Genesys includes a **small** non-ordered development license at no cost when ordering a Basic or Intermediate Production Server. The license includes all Feature Licenses; and Access and Sessions licenses (8 of each).

Genesys includes a **large** non-ordered development license at no cost when ordering an Advanced Production Server. The license includes all Feature licenses; and Access and Sessions licenses (30 of each).

Interactions disconnect hourly.

Ordered development

If you require another server for development purposes, you can order a **small** or **large** ordered development license. This license is active for one year. Interactions disconnect hourly.

- A **small** ordered development license includes all Feature Licenses; and Access and Sessions licenses (8 of each).
- A **large** ordered development license includes all Feature Licenses; and Access and Sessions licenses (30 of each).

Trial or trial system

License that allows existing customers to deploy into production as a trial, product that they do not own. Used for trial purposes; expires after 60 days. Customers can add components to the license.

Evaluation

License that you can use for evaluation purposes, which are small configurations that you purchase. You cannot add other components to the pre-defined configuration for this license.

Application-based licenses

The core CIC server license provides the majority of needs but some external application servers require their own license. Some of the applications that require a license are:

- **CIC** - Primary, core license that enables the PureConnect Environment.
- **Media Server** - Provides a Media Server license to enable VOIP functionality.

- **Multi-Site Administration** - Multi-site administration licenses used in production environments. Requires re-registration after one year.

CIC server license attributes

Access

Allows a user or station to use a specific set of system capabilities.

Feature

Applied to a server or the system as a whole to enable a capability. For example, SIP, Switchover, Dialer, Recorder, Speech Recognition, Workforce Management, Optimizer, Integrations (SAP, Siebel, Salesforce).

Engine

Controls the amount of system resources used to deliver a specific system capability.

Session

Allows an application connection with the system for a specific purpose.

Hardware

Allows hardware to support customer systems including servers, gateways, phones, headsets, and related components.

CIC server feature key for installing updates

While you are paying maintenance, you can use the I3_FEATURE_SU_ALLOWED access key to install updates.

CIC Access licenses

About Access licenses

When a user logs on to the system, the capabilities available to the user depend on what licenses are associated to the logon. When a user logs on to a client application, the user provides a user ID and a station ID, typically. Once authenticated, the user's allowed capabilities consist of the combination of what the user ID and the Station ID are assigned. PureConnect provides expanded flexibility in how you apply features to stations and users.

Access licenses are accessible from a user license (Assigned or Concurrent) or from a station license. For example, if there are multiple shifts at a site, you can use station licenses. Alternately, if you have users such as sales or business managers who move around from place to place, you can use user licenses.

Use Interaction Administrator to allocate Access licenses after IC server installation. For more information about license allocation, see [Licensing in Interaction Administrator](#).

Note: Genesys recommends allocating Access licenses to both stations and users at the same time, so that you can balance the threshold of the license. For more information, see [License Allocation](#) in the *Interaction Administrator help*.

Access license types

Basic Station License

The Basic Station license enables station audio for a phone device or for the SIP Soft Phone on a client workstation. All active stations require a Basic Station license. Without one, the station does not have a dial tone or audio.

You can allocate a Basic Station license to Workstations, Managed Workstations, Stand-alone Fax, Stand-alone Phone, and Remote stations. For Dynamic Remote stations, where you provide just a phone number, CIC allocates a Basic Station license if any are available. You cannot configure a Basic Station license as Concurrent or allocate the license to users.

All workstations and configured remote stations must have a Basic Station license allocated to activate station audio. If you save an enabled station configuration that does not have the Basic Station license allocated, a message appears. The message indicates that you need a Basic Station license to activate the station.

You assign the basic station license to a station object only through Station Configuration dialog boxes in Interaction Administrator.

Client Access license

The Client Access license enables the client functionality of the CIC client. Without this license allocation, the CIC client cannot run on the station. You license the features by user, station, or both.

If a user logs on to a remote station, that station also must acquire a Client Access license. If a user logs on to a dynamic remote station—uses a remote phone number to log on to a CIC client—the user doesn't need a Client Access license.

You assign the Client Access license to a user or station object through User or Station Configuration dialog boxes in Interaction Administrator.

ACD Access license

The ACD Access license allows users to participate in ACD workgroup queues, hunt groups, and simultaneous ringing groups. The license allows workstations to monitor ACD queues for telephone calls only without the CIC client workstation software. ACD Phone Only workstations don't have licensing for screen pops, unified messaging, faxing, and the ability to start recording or realtime monitoring. You license ACD features by user, station, or both.

Supervisors can monitor ACD Phone Only workstations in real-time using the Call Center Workstation License.

You assign the ACD Access license to a user or station object through User or Station Configuration dialog boxes in Interaction Administrator.

Interaction Process Automation license

This license allows Interaction Process Automation (IPA) access. There are four IPA license types:

- **Direct Routed Work Items** - Allows you to start any process to which you have rights. It also allows you to receive Work Items that the system routes directly to you.
- **Group Routed Work Items** - Allows you to receive Work Items that the system routes to you directly or as a member of a workgroup (similar to an ACD queue).
- **Process Monitor** (user license only) - Allows you to view process status and details in the Process Monitor or to use Process Reporting in IC Business Manager Applications.
- **Process Designer** (user license only) - Allows you to use the Process Designer to create and modify Interaction Process Automation processes.

Note: Each license in this list allows you to use the Interaction Process Automation features included in all the previous licenses in the list. That is, the Group Routed Work Items license includes the Direct Routed Work Items license. The Process Monitor license includes both of the Routed Work Items licenses. The Process Designer license includes all the other licenses.

Add-on and module Access licenses

You can purchase add-on and module licenses as a package or individually to expand system features and functionality. The following table describes the available add-on and module licenses.

| License | Description |
|-----------------------------|--|
| Interaction Analyzer Access | Allows real-time word/phrase spotting on CIC calls recorded with Interaction Recorder. Requires the Interaction Analyzer Real Time Server, Interaction Recorder Server, and Interaction Recorder add-on access licenses. |

| | |
|--|---|
| Interaction Client Operator Add-On | Allows using operator add-on features in CIC. |
| Interaction Client Outlook Add-In | Allows using Outlook add-on features in CIC. |
| Interaction Dialer Add-On | Allows a user to take calls managed by Interaction Dialer. |
| Interaction Feedback Access | Allows a user to have a survey applied to an interaction in which they were a participant or to open the Interaction Feedback module in IC Business Manager. |
| Interaction Optimizer Access Real-time Adherence | Provides access for viewing real-time adherence events in multiple applications. For example, IC Business Manager, Interaction Desktop, and Interaction Supervisor. |
| Interaction Optimizer Client Access | Provides access for viewing individual schedules and submitting time-off request in Interaction Desktop. |
| Interaction Optimizer Real-time Adherence Tracking | Allows calculating and logging real-time adherence and actual schedule worked for a user. |
| Interaction Optimizer Schedulable | Allows scheduling of an agent. |
| Interaction Quality Manager | Allows users to create questionnaires (quality evaluations), score Interaction Recorder's recorded interactions, and search for completed scorecards in IC Business Manager. |
| Interaction Recorder Access | Allows recording a user. Without this license, recordings are encumbered. To access an encumbered recording, acquire a code from PureConnect Customer Care. For more information, see KB article: How to Access Encumbered Recordings . |
| Interaction Recorder Client Access | Allows users to search for and play back recorded interactions in the Interaction Recorder module of IC Business Manager. |
| Interaction Recorder Extreme Query | Provides access to Interaction Recorder Extreme Query Client so that a user can search and play back recorded calls; and view Graph Data of search results. |
| Interaction Scripter | Provides access to Interaction Scripter. |
| Interaction Supervisor iPad Edition | Provides access to Interaction Supervisor iPad Edition. |
| Interaction Supervisor Plug-in: Historical Reporting | Provides access to Historical Reporting in IC Business Manager. |
| Interaction Supervisor Plug-In: Interaction Dialer | Provides access to Dialer views in IC Business Manager. |
| Interaction Supervisor Plug-In: Reporting Assistant | Provides access to Interaction Reporter in IC Business Manager. |

| | |
|---|--|
| Interaction Supervisor Plug-In: System Status | Provides access to the System Status views in IC Business Manager. For example, Call Activity, License Statistics, Queues, Session Manager, System Graph, and System Statistics. |
| Interaction Supervisor Plug-In: Workgroup | Provides access to Agents and Workgroups views in IC Business Manager. For example, Agent Details, Agent Graph, Agent or Workgroup Queue, Agent Overview, Workgroup Details, Workgroup Directory, Workgroup Graph, Workgroup Overview, and Workgroup Statistics. |
| Interaction Tracker Access | Provides access to Tracker menu in CIC. |
| Salesforce Business User | Provides access to Salesforce as a business user. |
| Salesforce Standard User | Provides access to Salesforce as a standard user. |

License Allocation Methods

There are two license allocation methods in CIC: Assignable and Concurrent. For a single system, you can allocate both Assigned and Concurrent licenses. However, you must allocate all licenses for a specific user as either Assigned or Concurrent.

Assignable License Allocation Method

The Assignable license method allows you to allocate licenses to users or stations.

Note: You can only allocate the Basic Station license to stations.

Rules for Assignable licenses

- When you allocate an assignable license to a user, the user acquires the license immediately, independent of whether the user is logged on. If the user logs on to another computer, the system logs off the user from the previous computer. Removing the license from the user or deleting the user releases the acquired Assignable license.
- When you allocate an assignable license to a station, the station acquires the license immediately, independent of whether a user is logged on to that station. Removing the license from the station or deleting the station releases the acquired Assignable license.
- You can only configure licenses for stations as Assignable.

Concurrent License Allocation Method

The Concurrent license allocation method applies to users only and is based on the number of simultaneous users accessing a feature or function. The system doesn't allocate the license until the user logs on to an application. CIC maintains a list of users, a list of licenses available, and a list of licenses in use.

Concurrent license allocation benefits

- Flexibility and easier administration.
- Automatic reallocation of licenses based on shift changes.
- Reduction in license counts and management.

Note: With a Concurrent license, the system allocates all the licenses for a user when the corresponding product modules load. For example, suppose that a user has three licenses: Recorder, Supervisor, and Optimizer. When the user opens the Optimizer module, the system allocates all three licenses for the user even though the user is opening only one of the modules.

Rules for Concurrent licenses

- A user who logs on to a client application with a license configured as Concurrent acquires a Concurrent license. When the user logs off, the system releases the acquired Concurrent license. If the user logs on to another computer, the system logs off the user from the previous computer.
- If a user acquires a license and any application on any computer reacquires that license for that same user, the system uses the license acquired previously. The license count doesn't increase.
- You cannot configure licenses for stations as Concurrent.

License allocation scenario

Let's say that you have 50 Interaction Tracker Access licenses. If you use:

- **Assignable licensing** - You can only assign the license to 50 users, and only those users can access Interaction Tracker.
- **Concurrent licensing** - You can assign the license to more than 50 users; however, only 50 users maximum can access Interaction Tracker at the same time.

Activation File Management Tool

The Activation File Management Tool (AFMT) allows customers with a perpetual license to manage and configure their PureConnect product licenses. Subscription customers must request a license from the Genesys Licensing Team. For more information, see [Request a License File](#).

AFMT replaces the License Management System (LMS) for PureConnect products. The following table lists the differences between LMS and AFMT.

| LMS | AFMT | Comment |
|--|--|--|
| Summary tab | Account Summary tab | |
| License Activity tab | Activation File Activity tab | |
| New License tab | New Activation File tab | |
| N/A | Software Details tab | Provides details about each product. |
| N/A | Upgrade Software tab | Provides ability to upgrade licenses to a newer version. |
| N/A | Install Sites tab | Provides ability to manage install sites. |
| Snapshot tab | N/A | Not migrated to new system. Historical information exists in LMS but not new orders or changes to a customer account that occurred after migration. To see new orders or changes after migration, see the service contract. |
| CIC and SIP products available in two separate locations. | CIC and SIP products appear together on all tabs. | |
| Licenses based on anniversary date and required re-registration. | Software licenses are perpetual and have an expiration date of 1/1/2100. | |

Customers can access the tool on the [My Support Dashboard](#). Partners can access the tool on the [Partner portal](#). You must have the appropriate credentials to access these portals.

Note: You can also use the [Genesys Activation File Request Tool](#) to communicate with the Genesys Licensing Team about licensing related issues or to request an activation file. The tool doesn't require logon credentials.

Manage Activation Files

Activation File Related Question Third-Party Activation File Request



Account Name: Genesys Customer Care Platform

Support Option: Unknown

Account Summary Software Details Activation File Activity Upgrade Software New Activation File Install Sites

Summary

Install Site: Product Category: Number of Total Results # 7

| Part Number | Product Category | Description | Total | Used | Available |
|---|------------------|--|-------|------|-----------|
| SW-001-4.0-AL02 I3_ACCESS_CLIENT (1 assigned, 0 pooled) I3_LICENSE_BASIC_STATION (1 assigned, 0 pooled) | CIC 4.0 | Business Client | 50 | 50 | 0 |
| SW-001-4.0-AL06 | CIC 4.0 | Contact Center Level 3 | 125 | 120 | 5 |
| SW-001-4.0-IDS2 | CIC 4.0 | Large PureConnect On Premise development system - Included w/ Server | 1 | 0 | 1 |
| SW-001-4.0-PL04 | CIC 4.0 | Advanced Session | 101 | 100 | 1 |
| SW-001-4.0-PL06 | CIC 4.0 | Conference Session | 101 | 100 | 1 |
| SW-001-4.0-PL09 | CIC 4.0 | Media Session | 169 | 120 | 49 |
| SW-001-4.0-SL03 | CIC 4.0 | Intermediate Server | 1 | 1 | 0 |

Activation File Related Question: Opens the Activation File Related Question page to allow you to ask a license-related question or request an activation file.

Third-party Activation File Request: Opens the Third-Party Activation File Request page to allow you to submit a third-party license request.

Help: Open the *Activation File Management Tool Guide*, which provides an overview of the tool.

Account Name: Account for which to view licenses.

Account Summary tab

The Account Summary tab displays all ordered items that are available to license for a specified account. You can generate a license based on any of these items.

Manage Activation Files

Activation File Related Question Third-Party Activation File Request



Account Name: Genesys Customer Care Platform GO

Support Option: Unknown

- Account Summary
- Software Details
- Activation File Activity
- Upgrade Software
- New Activation File
- Install Sites

Summary

Install Site: All Install Sites Product Category: -- ALL -- Clear Filters Number of Total Results # 7

| Part Number | Product Category | Description | Total | Used | Available |
|---|------------------|--|-------|------|-----------|
| SW-001-4.0-AL02 I3_ACCESS_CLIENT (1 assigned, 0 pooled) I3_LICENSE_BASIC_STATION (1 assigned, 0 pooled) | CIC 4.0 | Business Client | 50 | 50 | 0 |
| SW-001-4.0-AL06 | CIC 4.0 | Contact Center Level 3 | 125 | 120 | 5 |
| SW-001-4.0-IDS2 | CIC 4.0 | Large PureConnect On Premise development system - Included w/ Server | 1 | 0 | 1 |
| SW-001-4.0-PL04 | CIC 4.0 | Advanced Session | 101 | 100 | 1 |
| SW-001-4.0-PL06 | CIC 4.0 | Conference Session | 101 | 100 | 1 |
| SW-001-4.0-PL09 | CIC 4.0 | Media Session | 169 | 120 | 49 |
| SW-001-4.0-SL03 | CIC 4.0 | Intermediate Server | 1 | 1 | 0 |

Software Details tab

The Software Details tab displays an overview of an account's eligibility to create and download a license file.

Manage Activation Files Activation File Related Question Third-Party Activation File Request HELP

Account Name: Genesys Customer Care Platform Support Option: Unknown

Account Summary **Software Details** Activation File Activity Upgrade Software New Activation File Install Sites

Software Details

* Any licenses mirrored prior to Aug 2017 will not show as Mirrored but are considered Mirrored.

| Part Number | Product Category | Description | Mirror | Sold To | Perpetual | Non Perpetual | Total |
|-----------------|------------------|--|--------|--------------------------------|-----------|---------------|-------|
| SW-001-4.0-AL02 | CIC 4.0 | Business Client | No | Genesys Customer Care Platform | 50 | 0 | 50 |
| SW-001-4.0-AL06 | CIC 4.0 | Contact Center Level 3 | No | Genesys Customer Care Platform | 125 | 0 | 125 |
| SW-001-4.0-IDS2 | CIC 4.0 | Large PureConnect On Premise development system - Included w/ Server | No | Genesys Customer Care Platform | 1 | 0 | 1 |
| SW-001-4.0-PL04 | CIC 4.0 | Advanced Session | No | Genesys Customer Care Platform | 101 | 0 | 101 |
| SW-001-4.0-PL06 | CIC 4.0 | Conference Session | No | Genesys Customer Care Platform | 101 | 0 | 101 |
| SW-001-4.0-PL09 | CIC 4.0 | Media Session | No | Genesys Customer Care Platform | 169 | 0 | 169 |
| SW-001-4.0-SL03 | CIC 4.0 | Intermediate Server | No | Genesys Customer Care Platform | 1 | 0 | 1 |

Activation File Activity tab

The Activation File Activity tab displays a summary of generated files and the actions available for licenses.

Manage Activation Files Activation File Related Question Third-Party Activation File Request HELP

Account Name: Genesys Customer Care Platform Support Option: Unknown

Account Summary Software Details **Activation File Activity** Upgrade Software New Activation File Install Sites

Activation File Activity

Install Site: All Install Sites
 Active: Yes
 Generated By: Machine Name

Generation Date (>=):
 Product Line: -- ALL --
 License Type: -- ALL --

Number of Total Results # 1

| Generated Date | Expiration Date | Active | Install Site | Generated By | Machine | Product | Type | Sold To | Actions |
|----------------|-----------------|--------|-------------------|--------------|---------|---------|------------|--------------------------------|---------|
| 08/30/2018 | 01/01/2100 | Yes | Test Install Site | Work TestIS0 | testing | CIC 4.0 | Production | Genesys Customer Care Platform | |

View licenses for an account

Use the filtering options to view active and inactive licenses generated for an account. The following table describes the options available for filtering which licenses to display.

| Option | Description |
|----------------------|--|
| Install Site | Displays licenses for the specified install site only. All Install Sites displays licenses for all install sites. |
| Generation Date (>=) | Displays licenses that you generated on or after the specified date. [Blank] displays licenses regardless of generation date, unless you specify a date in the Generation Date (<=) box. You can use this option with the Generation Date (<=) option to specify a date range. |
| Generation Date (<=) | Displays licenses that you generated on or before the specified date. [Blank] displays licenses regardless of generation date, unless you specify a date in the Generation Date (>=) box. You can use this option with the Generation Date (>=) option to specify a date range. |
| Active | Yes displays active licenses only. No displays inactive licenses only. All displays active and inactive licenses. |
| Product Line | Displays licenses for the specified product line only. All displays licenses for all products. |
| License Type | Displays licenses for the specified license type only. All displays licenses for all license types. |
| Generated By | Displays licenses that the specified person generated only. [Blank] displays licenses that anyone generated. |
| Machine Name | Displays licenses for the specified computer only. [Blank] displays licenses for all computers. |

View license details

Use the View icon  to display the **View License** page. This page displays detailed information about a license.

Product CIC 4.0
 Generation Date 08/04/2018
 Expiration Date 01/01/2100
 Generated By Work Test80
 Company Name Genesys Customer Care Platform
 Site Name Test Install Site

Details

| | | |
|-----------------|--|--------------|
| Server Info | Host Id | Machine Name |
| | G807test | testing |
| Machine Type | Media Server Based (4.0+ only) | |
| Mail Connector | Microsoft Exchange Server | |
| Expiration Date | 01/01/2100 | |
| Description | Used in production settings. Licenses are generated by selecting Ordered Items from the Account Summary. | |
| Bundle | CIC 4.0 Production Bundle | |

Features

| Feature |
|------------------------------|
| I3_FEATURE_VERSION_CIC |
| I3_FEATURE_RWP_CITY |
| I3_FEATURE_SIP |
| I3_FEATURE_SMS |
| I3_FEATURE_MEDIA_SERVERS |
| I3_FEATURE_ADVANCED_SECURITY |
| I3_FEATURE_SU_ALLOWED |

Licenses

| License |
|---|
| I3_ACCESS_SYSTEM_STATUS_SUPERVISOR_PLUGIN (10 assigned, 6 pooled) |
| I3_LICENSE_CONFERECE_SESSION_ADDON (100 assigned, 0 pooled) |
| I3_ACCESS_CLIENT (170 assigned, 0 pooled) |
| I3_ACCESS_ACD_MEDIA_3_PLUS (120 assigned, 0 pooled) |
| I3_ACCESS_RECORDER_QUALITYMONITORING_AGENT (120 assigned, 0 pooled) |
| I3_LICENSE_MEDIA_SESSION_ADDON (120 assigned, 0 pooled) |
| I3_LICENSE_BASIC_STATION (170 assigned, 0 pooled) |
| I3_LICENSE_ADVANCED_SESSION_ADDON (100 assigned, 0 pooled) |

Ordered Items Used

| Ordered Item |
|--|
| SW-001-4.0-SL03 Intermediate Server (1) |
| SW-001-4.0-AL02 Business Client (50) |
| SW-001-4.0-AL08 Contact Center Level 3 (120) |
| SW-001-4.0-PL04 Advanced Session (100) |
| SW-001-4.0-PL08 Conference Session (100) |
| SW-001-4.0-PL09 Media Session (120) |

Download a license file



Use the Download icon to download a license file to your default download location with a file name extension of "I3Lic.". IC Setup Assistant and other installations such as Language Packs require this license file. The system requests it when you install the CIC server software.

Update a license

Use the Update icon  to update an existing license to increase the number of stations or lines.

Deactivate a license

Use the Deactivate icon  to deactivate a license. You can deactivate a license:

- If the license generated incorrectly
- To reallocate the license after an organizational change or after adding a server

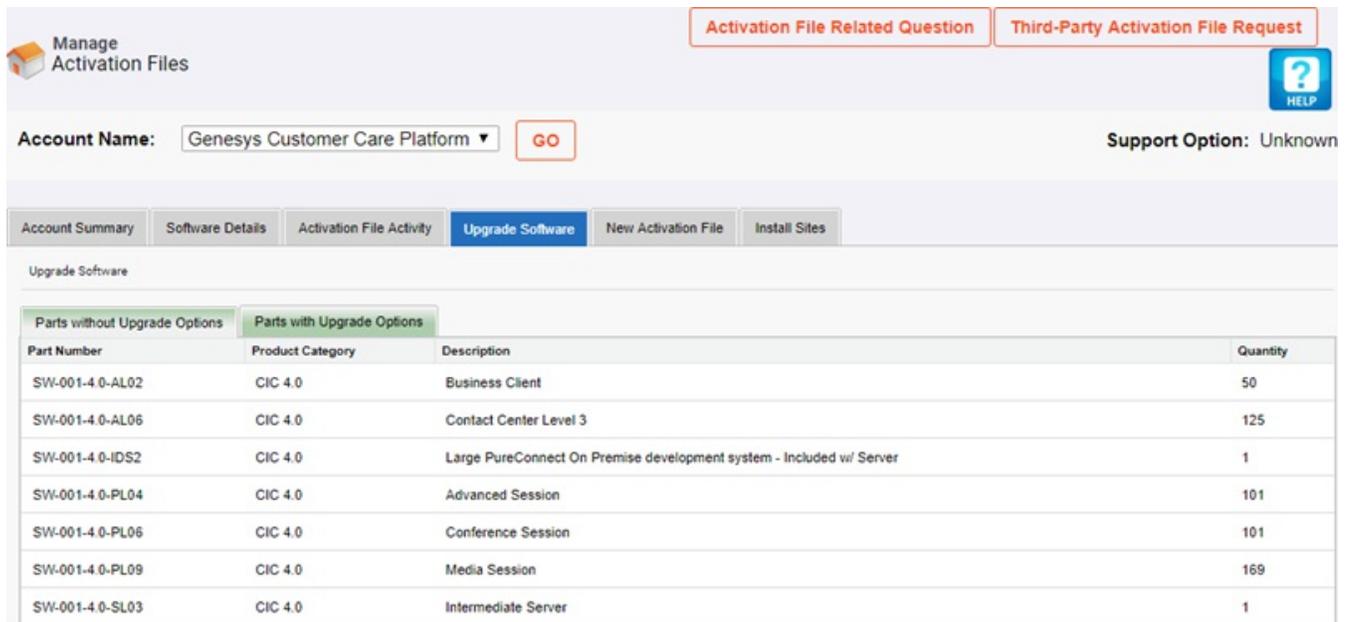
When you deactivate a license, the number of lines and workstations are available again for allocation.

Note: PureConnect pools all licenses. When you allocate licenses, allocate them by site.

Upgrade software tab

The Upgrade Software tab displays products with and without upgrade options.

Parts without Upgrade Options tab



The screenshot shows the 'Manage Activation Files' interface. At the top, there are links for 'Activation File Related Question' and 'Third-Party Activation File Request', and a 'HELP' button. The 'Account Name' is 'Genesys Customer Care Platform' with a 'GO' button. The 'Support Option' is 'Unknown'. Below the account information, there are tabs for 'Account Summary', 'Software Details', 'Activation File Activity', 'Upgrade Software' (selected), 'New Activation File', and 'Install Sites'. The 'Upgrade Software' section has two sub-tabs: 'Parts without Upgrade Options' and 'Parts with Upgrade Options'. The 'Parts with Upgrade Options' tab is active, displaying a table with the following data:

| Part Number | Product Category | Description | Quantity |
|-----------------|------------------|--|----------|
| SW-001-4.0-AL02 | CIC 4.0 | Business Client | 50 |
| SW-001-4.0-AL06 | CIC 4.0 | Contact Center Level 3 | 125 |
| SW-001-4.0-IDS2 | CIC 4.0 | Large PureConnect On Premise development system - Included w/ Server | 1 |
| SW-001-4.0-PL04 | CIC 4.0 | Advanced Session | 101 |
| SW-001-4.0-PL06 | CIC 4.0 | Conference Session | 101 |
| SW-001-4.0-PL09 | CIC 4.0 | Media Session | 169 |
| SW-001-4.0-SL03 | CIC 4.0 | Intermediate Server | 1 |

Parts with Upgrade Options tab

You can select individual products to upgrade. However, if mirroring is available, you must upgrade all products with the upgrade option.

| Parts without Upgrade Options | | Parts with Upgrade Options | | | |
|---|------------------|--|--|---------------------|------------------------------|
| Upgrade Option: 3.0 -> 4.0 | | | Upgrade Selected | | Number of Total Results # 14 |
| Mirror 3.0 -> 4.0 <input type="checkbox"/> By selecting this checkbox, annual support renewal will be charged on the most recent software version of products. | | | | | |
| Part Number | Product Category | Description | Upgrade Options | Mirroring Available | Upgrade Quantity |
| SW-001-3.0-AA01 | CIC 3.0 | Interaction Supervisor add-on | <input checked="" type="checkbox"/> 3.0 -> 4.0 | Yes | 1 of 1 |
| SW-001-3.0-AA07 | CIC 3.0 | Interaction Client Mobile Edition - Add on | <input checked="" type="checkbox"/> 3.0 -> 4.0 | Yes | 4 of 4 |
| SW-001-3.0-AA08 | CIC 3.0 | Unified Messaging add-on | <input checked="" type="checkbox"/> 3.0 -> 4.0 | Yes | 35 of 35 |
| SW-001-3.0-AAF1 | CIC 3.0 | Interaction Client for Outlook Edition Add-on | <input checked="" type="checkbox"/> 3.0 -> 4.0 | Yes | 4 of 4 |
| SW-001-3.0-AL01 | CIC 3.0 | Basic Station | <input checked="" type="checkbox"/> 3.0 -> 4.0 | Yes | 30 of 30 |
| SW-001-3.0-AL02 | CIC 3.0 | Business Client | <input checked="" type="checkbox"/> 3.0 -> 4.0 | Yes | 35 of 35 |
| SW-001-3.0-AL04 | CIC 3.0 | Contact Center Level 1 | <input checked="" type="checkbox"/> 3.0 -> 4.0 | Yes | 9 of 9 |
| SW-001-3.0-IDS1 | CIC 3.0 | Small PureConnect On Premise development system - included w/ Server | <input checked="" type="checkbox"/> 3.0 -> 4.0 | Yes | 1 of 1 |
| SW-001-3.0-PL03 | CIC 3.0 | Basic Session | <input checked="" type="checkbox"/> 3.0 -> 4.0 | Yes | 16 of 16 |

New Activation File tab

The **New Activation File** tab allows you to generate a new activation file. Trial bundle licenses and add-on bundle licenses are not available in the Activation File Management Tool.

Manage Activation Files Activation File Related Question Third-Party Activation File Request HELP

Account Name: Genesys Customer Care Platform GO Support Option: Unknown

Account Summary Software Details Activation File Activity Upgrade Software **New Activation File** Install Sites

Please select a product

Sold To: Genesys Customer Care Platform Install Site: Test Install Site Product: CIC Product Version: CIC 4.0 License Type: Production Go Reset

Machine Details

Host Id *
This value can be retrieved from the IC Setup Assistant. Host Id can also be generated using the GetHostID utility and is available on the Support website.

Machine Name *

System Type
Important Note: The System Type must be accurate or your license may not work as expected. --None--

Mail Connector
Please specify the type of Mail Connector in use. --None--

Select One Valid Server Item

| Part Number | Description | Total | Used | Available | Use |
|---------------------------------------|--|-------|------|-----------|-----------------------|
| <input type="radio"/> SW-001-4.0-IDS2 | Large PureConnect On Premise development system - Included w/ Server | 1 | 0 | 1 | <input type="radio"/> |

Provide Switchover information at another time

Switchover Machine

Host Id
This value can be retrieved from the IC Setup Assistant. Host Id can also be generated using the GetHostID utility and is available on the Support website.

Machine Name

There are no switchover parts available

Generate Activation File Cancel

Install Sites tab

The Install Sites tab allows you to view, edit, create, and deactivate install sites.

Manage Activation Files Activation File Related Question Third-Party Activation File Request HELP

Account Name: Genesys Customer Care Platform GO Support Option: Unknown

Account Summary Software Details Activation File Activity Upgrade Software New Activation File **Install Sites**

Active: -- ALL -- New Install Site Number of Total Results # 1

| Actions | Name | Address | City | State | Country | Postal Code | Active |
|----------------------|-------------------|-------------|-----------|------------|-------------|-------------|--------|
| Edit | Test Install Site | 112 Test St | Test City | Test State | Test County | 88888 | Yes |

New Install Site: Opens the Install Site Details dialog box to allow you to create an install site.

Install Site Details

| | |
|-----------------------|-------------------------------------|
| Name * | <input type="text"/> |
| Address Line 1 | <input type="text"/> |
| Address Line 2 | <input type="text"/> |
| Address Line 3 | <input type="text"/> |
| City | <input type="text"/> |
| State | <input type="text"/> |
| Country | <input type="text"/> |
| Postal Code | <input type="text"/> |
| Active | <input checked="" type="checkbox"/> |

Edit: Opens the **Install Site Details** dialog box in edit mode to allow you to modify an install site. To deactivate an install site, clear the **Active** check box

Install Site Details

| | |
|-----------------------|-------------------------------------|
| Name * | Test Install Site |
| Address Line 1 | 112 Test St |
| Address Line 2 | <input type="text"/> |
| Address Line 3 | <input type="text"/> |
| City | Test City |
| State | Test State |
| Country | Test County |
| Postal Code | 88888 |
| Active | <input checked="" type="checkbox"/> |

New License Generation

Your license defines the product version, Server features, Basic Station and Access license components, more license components, and license quantities that are in your agreement. Before generating and downloading your license to your IC server, ensure that you ordered your CIC product.

Tip: Check the [Activation File Management Tool](#) at least two weeks before installing CIC to confirm that your license information is correct. Having your license on your computer can save you time during the CIC installation process. For more information about opening the Activation File Management Tool, see [Open the Activation File Management Tool](#).

Process overview

1. Genesys processes your order and creates your company account.
2. You generate the license using the Activation File Management Tool.
3. You download your license to the IC server.

Who can generate licenses

Only an individual who holds a current CIC Core Technology Certification for a product can generate a license. You can obtain your license file from the Activation File Management Tool. Certified partner employees can generate an unlimited number of 30-day non-ordered development licenses for any product and any configuration.

License validity

Your new license is valid immediately after you download it. You can download this license as many times as you need.

Tip: Make a backup copy of your downloaded license file.

Open the Activation File Management Tool

Customers and partners with the appropriate logon credentials can use the [Activation File Management Tool](#). The method for opening the tool differs but the functionality is the same.

Customers

To open the Activation File Management Tool

1. Open the [My Support Dashboard](#). The **Customer Care Communications Portal Logon** dialog box appears.

Our Customer Care Communications Portal

LOG IN

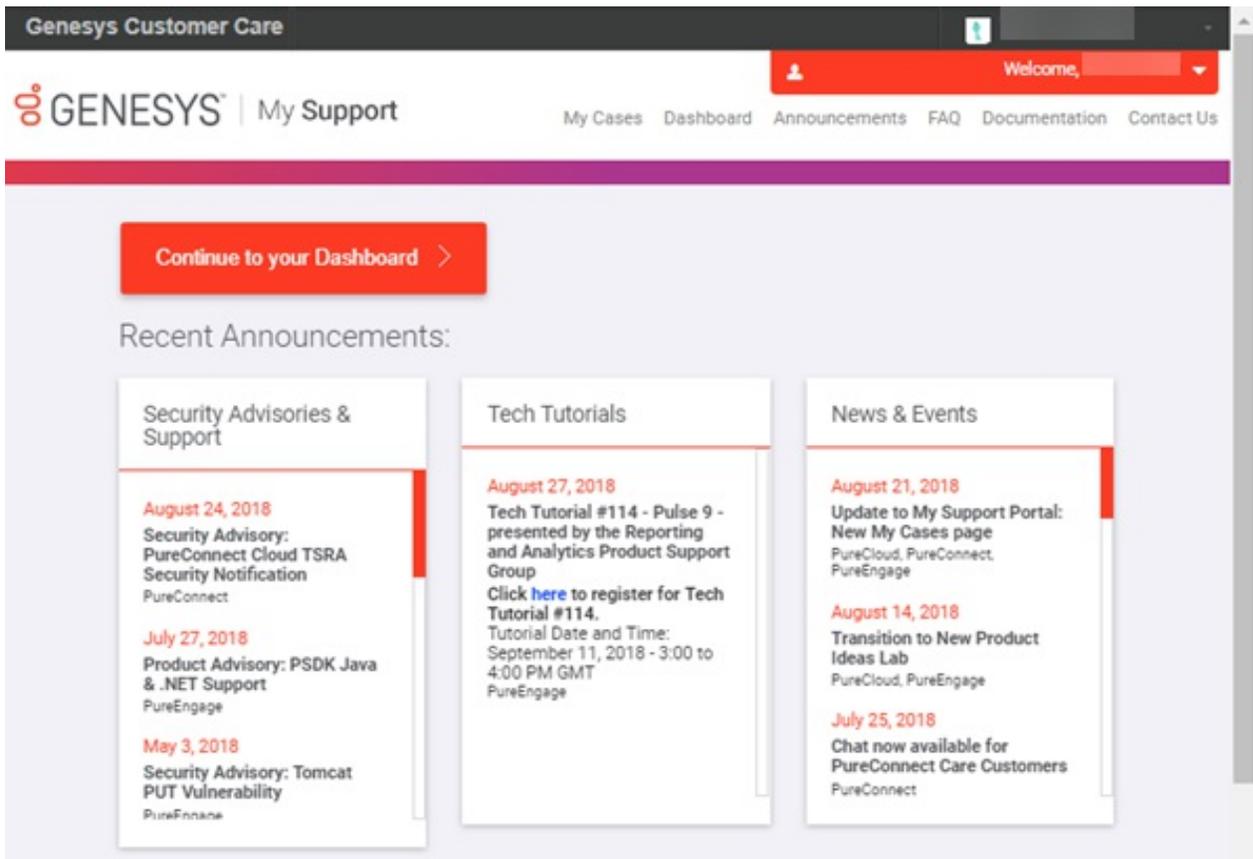
GET STARTED

Login

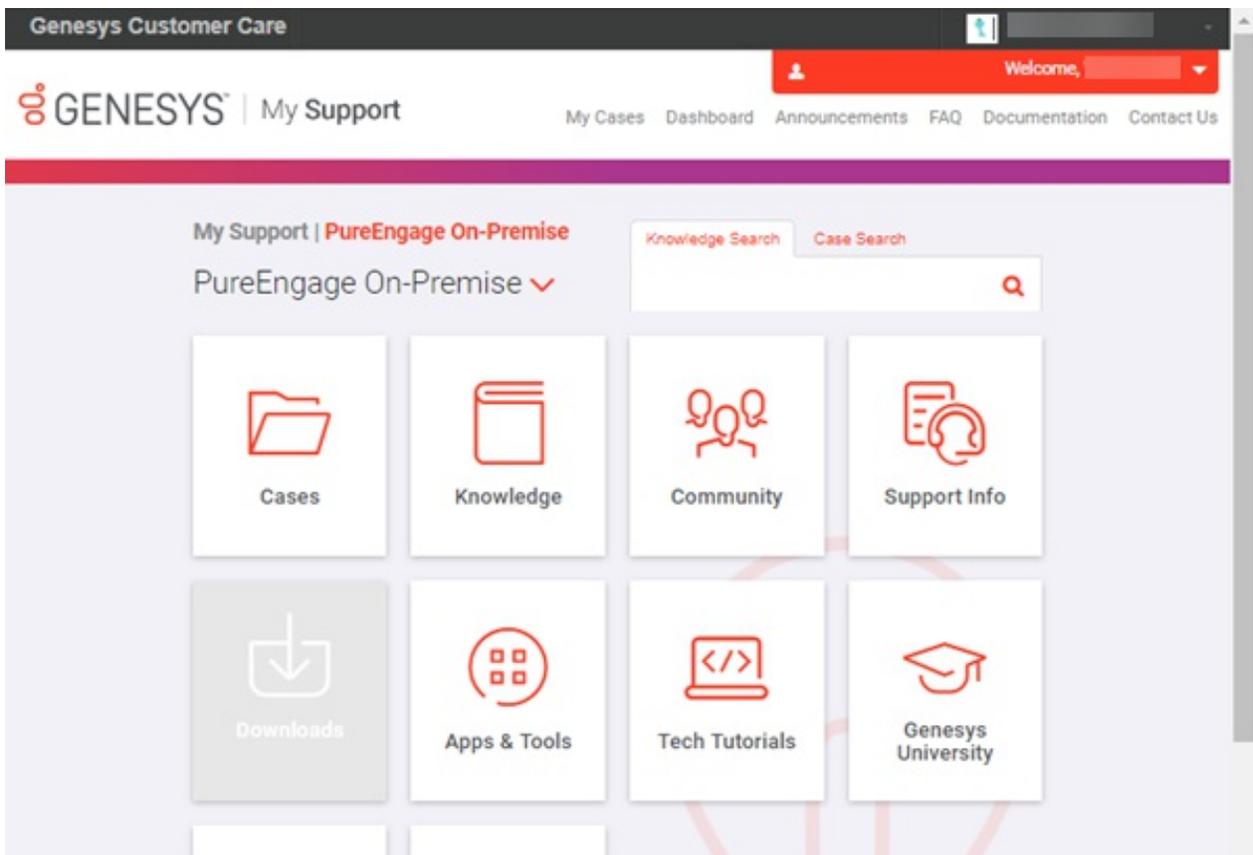
[Forgot Password?](#)

Please Note: All passwords were changed on October 28th, 2017.
If you have not received a new password,
please click on the [Forgot Password](#) link above.

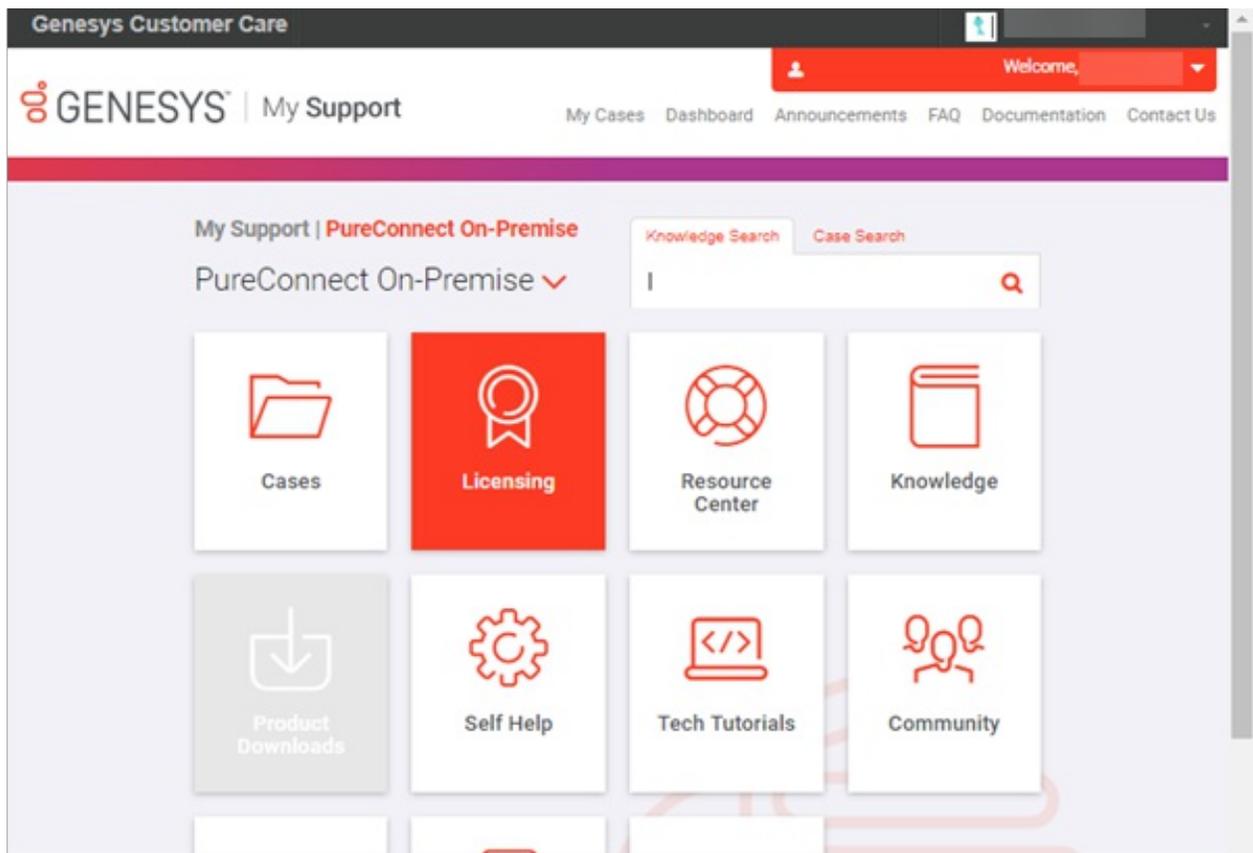
2. Specify your credentials and then click **Login**. The **Recent Announcements** page appears.



3. Click Continue to your Dashboard. Your Dashboard appears.



4. In the PureEngage On-Premise list box, click PureConnect On-Premise. The options for PureConnect On-Premise appear.



5. Click the **Licensing** tile. The **Manage Activation Files** page appears.

Manage Activation Files

Activation File Related Question

Third-Party Activation File Request



Account Name: Genesys Customer Care Platform **GO**

Support Option: Unknown

Account Summary Software Details Activation File Activity Upgrade Software New Activation File Install Sites

Summary

Install Site: Product Category: **Clear Filters** Number of Total Results # 7

All Install Sites -- ALL --

| Part Number | Product Category | Description | Total | Used | Available |
|---|------------------|--|-------|------|-----------|
| SW-001-4.0-AL02 I3_ACCESS_CLIENT (1 assigned, 0 pooled) I3_LICENSE_BASIC_STATION (1 assigned, 0 pooled) | CIC 4.0 | Business Client | 50 | 50 | 0 |
| SW-001-4.0-AL06 | CIC 4.0 | Contact Center Level 3 | 125 | 120 | 5 |
| SW-001-4.0-IDS2 | CIC 4.0 | Large PureConnect On Premise development system - Included w/ Server | 1 | 0 | 1 |
| SW-001-4.0-PL04 | CIC 4.0 | Advanced Session | 101 | 100 | 1 |
| SW-001-4.0-PL06 | CIC 4.0 | Conference Session | 101 | 100 | 1 |
| SW-001-4.0-PL09 | CIC 4.0 | Media Session | 169 | 120 | 49 |
| SW-001-4.0-SL03 | CIC 4.0 | Intermediate Server | 1 | 1 | 0 |

Partners

To access the Activation File Management Tool

1. Open the [Partner Network portal](#). The Partner Network Logon dialog box appears.

GENESYS™ Partner Network

User Name

Password

Log in

Remember User Name

[Forgot your password?](#) [Need to register?](#)

[How to Apply Video Guide](#)

2. Specify your credentials and then click **Login**. The **Partner Network Home** page appears.

Partner Network

Home Genie Deal Registration Performance Events GU Compliance Sales Training Price Lists AppFoundry License Report **Activation File Management**

Partner Information

Partner: Genesys Customer Care Platform

Partner Category:

Tier:

Type:

Partner Offering Type:

ID: 100380

Genesys Acquires Altocloud!
Click Here to view the press release!

Hello Work Test80!

Welcome to the Genesys Partner Portal, the single source for all you need to power your success.

From access to sales tools, training courses, performance management, and training courses, the Partner Portal simplifies your entire partner engagement with Genesys.

See the Future of Customer Experience at CX18

THE FUTURE OF CX IS HERE

Portal User

Work Test80
CX Monstera
work.test80@shaw.ca
Work Phone :
Cell Phone :

Channel Manager

Maria Preobrazhenskaya
Director, Business Process Analysis
maria.preobrazhenskaya@genesys.com
Work Phone : 1 850 466-1029
Cell Phone : 1 415 279-3545

Regional Channel Manager

Denise Govoni
VP, Customer Success
denise.govoni@genesys.com
Work Phone : 1 803 809-6700
Cell Phone : 1 803 809-5700

Quick Links

Partner Marketing Central
Genesys Knowledge Network
Partner Directory
G-DEMO
RFP Tool(to request access, contact
PartnerRFPToolHelp@genesys.com
Genesys Technical Docs
Genesys Corporate Website
Customer Care - My Support
Technical training & Certification
AppFoundry Application
AppFoundry Homepage
DevFoundry

3. Click the Activation File Management tile. The Manage Activation Files page appears.

Partner Network

Home Genie Deal Registration Performance Events GU Compliance Sales Training Price Lists AppFoundry License Report **Activation File Management**

Manage Activation Files

Account Name: Genesys Customer Care Platform GO Support Option: Unknown

Account Summary Software Details Activation File Activity Upgrade Software New Activation File Install Sites

Summary

Install Site: All Install Sites Product Category: --ALL-- Clear Filters

| Part Number | Product Category | Description | Number of Total Results # 7 | | |
|-----------------|------------------|--|-----------------------------|------|-----------|
| | | | Total | Used | Available |
| SW-001-4.0-AL02 | CIC 4.0 | Business Client | 50 | 50 | 0 |
| SW-001-4.0-AL06 | CIC 4.0 | Contact Center Level 3 | 125 | 120 | 5 |
| SW-001-4.0-DS2 | CIC 4.0 | Large PureConnect On Premise development system - Included w/ Server | 1 | 0 | 1 |
| SW-001-4.0-PL04 | CIC 4.0 | Advanced Session | 101 | 100 | 1 |
| SW-001-4.0-PL06 | CIC 4.0 | Conference Session | 101 | 100 | 1 |
| SW-001-4.0-PL09 | CIC 4.0 | Media Session | 169 | 120 | 49 |
| SW-001-4.0-SL03 | CIC 4.0 | Intermediate Server | 1 | 1 | 0 |

Generate a Production License

CIC 4.0 Production licenses include information for both IC servers in a switchover pair. You can apply this single license file to both computers.

To generate and download a new license file to your IC server

1. Ensure that you placed an order for a CIC production license with Sales, Genesys processed the order, and Genesys created your company account.
2. In the Activation File Management Tool, click the **Account Summary** tab.

Manage Activation Files
Activation File Related Question
Third-Party Activation File Request

Support Option: Unknown

Account Name: Genesys Customer Care Platform
GO

Account Summary
Software Details
Activation File Activity
Upgrade Software
New Activation File
Install Sites

Summary

Install Site: All Install Sites Product Category: -- ALL -- Clear Filters Number of Total Results # 7

| Part Number | Product Category | Description | Total | Used | Available |
|---|------------------|--|-------|------|-----------|
| SW-001-4.0-AL02 I3_ACCESS_CLIENT (1 assigned, 0 pooled) I3_LICENSE_BASIC_STATION (1 assigned, 0 pooled) | CIC 4.0 | Business Client | 50 | 50 | 0 |
| SW-001-4.0-AL06 | CIC 4.0 | Contact Center Level 3 | 125 | 120 | 5 |
| SW-001-4.0-IDS2 | CIC 4.0 | Large PureConnect On Premise development system - Included w/ Server | 1 | 0 | 1 |
| SW-001-4.0-PL04 | CIC 4.0 | Advanced Session | 101 | 100 | 1 |
| SW-001-4.0-PL06 | CIC 4.0 | Conference Session | 101 | 100 | 1 |
| SW-001-4.0-PL09 | CIC 4.0 | Media Session | 169 | 120 | 49 |
| SW-001-4.0-SL03 | CIC 4.0 | Intermediate Server | 1 | 1 | 0 |

3. In the Account Name list box, select the account to view. A summary of all ordered products that are available to license for the selected account appears.
4. Click the New Activation File tab.

Manage Activation Files
Activation File Related Question
Third-Party Activation File Request

Support Option: Unknown

Account Name: Genesys Customer Care Platform
GO

Account Summary
Software Details
Activation File Activity
Upgrade Software
New Activation File
Install Sites

Please select a product

Sold To: Genesys Customer Care Platform
Install Site: All Install Sites
Product: -- SELECT --
Product Version: -- SELECT --
License Type: -- SELECT --

Go
Reset

5. From the list boxes, select an Install Site, Product, Product Version, and License Type and then click Go.

Manage Activation Files Activation File Related Question Third-Party Activation File Request HELP

Account Name: Genesys Customer Care Platform Support Option: Unknown

Account Summary Software Details Activation File Activity Upgrade Software **New Activation File** Install Sites

Please select a product

| Sold To | Install Site | Product | Product Version | License Type |
|--------------------------------|-------------------|---------|-----------------|--------------|
| Genesys Customer Care Platform | Test Install Site | CIC | CIC 4.0 | Production |

Machine Details

Host Id *
This value can be retrieved from the IC Setup Assistant. Host Id can also be generated using the GetHostID utility and is available on the Support website.

Machine Name *

System Type
Important Note: The System Type must be accurate or your license may not work as expected. --None--

Mail Connector
Please specify the type of Mail Connector in use. --None--

Select One Valid Server Item

| Part Number | Description | Total | Used | Available | Use |
|-----------------|--|-------|------|-----------|-----------------------|
| SW-001-4.0-IDS2 | Large PureConnect On Premise development system - Included w/ Server | 1 | 0 | 1 | <input type="radio"/> |

Provide Switchover information at another time

Switchover Machine

Host Id
This value can be retrieved from the IC Setup Assistant. Host Id can also be generated using the GetHostID utility and is available on the Support website.

Machine Name

There are no switchover parts available

6. In the **Machine Details** section, do the following:
 - a. In the **Host Id** box, type the host ID of your IC server.

Notes:

- Starting in 2020 R2, subscription customers with the I3_FEATURE_VIRTUAL_CLOUD license and a Genesys Cloud hybrid connection don't need the host ID.
- PureConnect Licensing is based on a host ID for the IC server and media server, instead of the MAC address. (The host ID is the code that uniquely identifies a server and locks a license to that server.) Use the GetHostID utility program to generate the host ID before installation. Download the program from the CIC 4.0 iso or from the [PureConnect Product Downloads page](#).

- b. In the **Machine Name** box, type the name of the IC server to which to download the license file.
 - c. In the **System Type** list box, click **Media Server Based**.
 - d. In the **Mail Connector** list box, click the type of mail connector in use.
7. In the **Select One Valid Server Item** section, select the server type for which to generate and download a license.
8. If you have licensing for a switchover server, do one of the following:
 - If you aren't ready to provide information about the switchover server, select the **Provide Switchover information at another time** check box. The system hides the **Switchover Machine** section. You can return to the Activation File Management Tool later to generate a new license that includes both servers.
 - If you are ready to provide information about the switchover server, clear the **Provide Switchover information at another time** check box.
9. To provide information about the switchover server, in the **Switchover Machine** section, do the following:
 - a. In the **Host ID** box, type the host ID for the MAC address of the network card on the second IC server in the switchover pair.

Note: Starting in 2020 R2, subscription customers with the I3_FEATURE_VIRTUAL_CLOUD license and a Genesys Cloud hybrid connection don't need the host ID.

- a. In the **Machine Name** box, type the name of the second IC server in the switchover pair.
 - b. In the **Select One Valid Switchover Server Item** section, select the switchover server type for the second server in the pair.
9. In the **Select Any Add-on Items** section, select the add-on items to associate to this server license.
 10. Click **Generate Activation File**. The license file generates and is ready for download.

Note: Trial bundle licenses and add-on bundle licenses are not available in the Activation File Management Tool.

PureConnect Licensing Technical Reference

Download the License File

After generating and viewing the license, download the activation file to the IC server or a location accessible from the IC server.

To download the license file

1. In the Activation File Management Tool, click the **Activation File Activity** tab.

Manage Activation Files

Account Name: Genesys Customer Care Platform Support Option: Unknown

Activation File Activity

Apply Filters Clear Filters Number of Total Results # 1

| Generated Date | Expiration Date | Active | Install Site | Generated By | Machine | Product | Type | Sold To | Actions |
|----------------|-----------------|--------|-------------------|--------------|---------|---------|------------|--------------------------------|---------|
| 08/30/2018 | 01/01/2100 | Yes | Test Install Site | Work Test80 | testing | CIC 4.0 | Production | Genesys Customer Care Platform | |

3. In the Actions column, click the Download icon . The file downloads to your default download location (for example, your Downloads folder) with a file name extension of "I3Lic."

IC Setup Assistant and other installations such as Language Packs require this license file. The system requests it when you install the CIC server software.

Copyright and trademark

Request a License File

Customers and partners can submit PureConnect license file requests through the Genesys Activation File Request Tool. You can also use this tool to communicate with the Genesys Licensing Team about licensing-related issues.

Note: If you need Subscription or Mixed Estate activation files, you must submit a request using this tool because only Genesys Licensing can generate these types of activation files.

To request a license file

1. [Open the Activation File Management Tool](#) and then, on the **Manage Activation Files** page, click **Non Perpetual Activation File Request**. The **Welcome to the Genesys Activation File Request Tool** page appears.

Note: To access the Genesys Activation File Request Tool using a direct link that doesn't require logon credentials, open <https://genesys.secure.force.com/activationfile> in your browser.

Welcome to the Genesys Activation File Request Tool

Please use this tool to communicate with the Genesys Licensing Team about licensing-related issues.

Step 1 – Complete Request Details

Enter contact details, account details and choose to submit either a 'Question' or an 'Activation File Request.'

If choosing an Activation File Request, select a 'Category':

- Genesys Environment
- Third-Party Products
- Pay-Per-Use or Hosted Environments

You can then choose the 'File Type' you need (ie. New Deployment, Evaluation, etc.). Based on your selections, the system will guide you to complete the important details the Licensing Team will need to process your request.

Step 2 – Add Attachments

The system will suggest you include certain attachments based on the Request Details you have entered.

Tip! Enter the **Genesys Account Reference Number (GARN)** and as much detail as possible in the form to allow for the quickest turnaround time. Your End User GARN can be found on your Software Fulfillment Notice, on your Genesys Sales or Maintenance Renewal Quote, or you can contact your Sales or Genesys Care representative.

Note: You will require a corporate email to submit the request.

Continue

2. Click **Continue**. The **Step 1 – Complete Request Details** page appears. If you accessed the tool from the "My Support Dashboard" or the "Partner Network" portal, the system might populate some of the boxes.

Step 1 – Complete Request Details

Request Summary

| | |
|---|--|
| First Name <input type="text"/> | Corporate Email <input type="text"/> |
| Last Name <input type="text"/> | Confirm Corporate Email <input type="text"/> |
| End User Account <input type="text"/> | Additional Email Recipients <input type="text"/> |
| Sold To Account <input type="text"/> | Work Phone <input type="text"/> |
| End User GARN <input type="text"/> | Employer <input type="text"/> |
| Request Type --None-- | |
| Subject <input type="text"/> | |
| Description <div style="border: 1px solid #ccc; height: 40px; width: 100%;"></div> | |
| Date Needed <input type="text" value="3/20/2019"/> | |
| Date Reasoning <div style="border: 1px solid #ccc; height: 40px; width: 100%;"></div> | |

First Name: Contact person's first name.

Last Name: Contact person's last name.

End User Account: End user account for this request.

Sold to Account: Partner or direct customer account that received the Genesys invoice.

End User GARN: Your Genesys Account Reference Number. You can find this number on your Software Fulfillment Notice or your Genesys Sales or Maintenance Renewal Quote. You can also contact your Sales or Genesys Care representative for assistance.

Request Type

Question: Indicates that you have a question for Genesys Licensing.

Activation File Request: Indicates that you are requesting a license file.

Activation File Category: If you selected "Question" as the request type, this list box isn't available.

Genesys Activation File: Indicates that you are requesting a license file for a Genesys product.

Third Party Activation File: Indicates that you are requesting a license file for a third-party product.

Pay Per Use/Hosted Activation File: Indicates that you are requesting a pay-per-use, hosted, or subscription license file.

Activation File Type: Type of license file, such as New Deployment or Upgrade. If you selected "Question" as the request type, this list box isn't available.

Subject: Short description of your request or question.

Description: Details regarding your license file request or the question that you are asking.

Urgent: If selected, your request is urgent and requires immediate attention. If you selected "Question" as the request type, this check box isn't available.

Date Needed: Date that you need the license file or answer to your question.

Date Reasoning: Reason that you need the license file or answer by the date specified.

Corporate Email: Your corporate email address.

Confirm Corporate Email: Your corporate email address, to ensure that you typed it correctly.

Additional Email Recipients: Email addresses of others to include in responses to this request.

Work Phone: Your work phone number.

Employer: Name of your employer.

3. Complete the information in the **Request Summary** section. For an Activation File Request, another section appears on the page based on the **Activation file Category** and **Activation File Type** that you selected, requesting one or more of the following:

Primary MAC ID or Host ID: Unique code that identifies the IC server or the host ID for the PureConnect production server.

Backup MAC ID or Host ID: Unique code that identifies the IC server or the host ID for the PureConnect switchover server.

Deployment Type: Type of deployment for which you are requesting a license file. For example, production, lab, test, disaster recovery cold standby, or disaster recovery hot standby.

Environment Type: Not applicable to PureConnect.

Expiration Date: Not applicable to PureConnect.

Expiration Date of the Hosting Contract: Not applicable to PureConnect.

Implementation Type: Type of implementation for which you are requesting a license file. For example, add-on, migration, new deployment, reallocation, temporary, or upgrade.

IVR Configuration: Not applicable to PureConnect.

MAC ID or Host ID: Unique code that identifies the IC server.

Max Number of Estimated Ports: Not applicable to PureConnect.

New Extension Date Requested: Not applicable to PureConnect.

O/S: Not applicable to PureConnect.

PBX/SIP: Not applicable to PureConnect.

Please clarify your request: More information regarding your request.

Port Type: Not applicable to PureConnect.

Primary MAC ID BC DR: Not applicable to PureConnect.

Backup MAC ID BC DR: Not applicable to PureConnect.

SO# or PO#: Product sales or purchase order number.

Third Party Activation File Type: Type of third-party license file that you are requesting. For example, Nuance or Zoom.

4. If another section appears on the page, complete the information and then click **Submit and Continue**. The system assigns an Activation File Request (AFR) number to the request and displays the **Step 2 - Add Attachments** page.

GENESYS

Step 2 – Add Attachments

AFR-0039604

Request Type Activation File Request

Subject Test

Request Attachments

Please upload your **Original Activation File** (if applicable) and any other files that may be helpful in the processing of your request.

File No file chosen

5. To attach files to the request, do the following:
 - a. Click **Browse...**
 - b. In the **Open** dialog box, click the file to attach and then click **Open**.
 - c. On the **Step 2 - Add Attachments** page, click **Upload Attachment**.
 - d. Attach more files as necessary.
6. Click **Done**. The system sends a confirmation email to the email addresses that you provided. You can reply to the confirmation email to provide updates to the Genesys Licensing team. A Genesys Licensing Analyst will contact you to provide the requested file, provide a response to your question, or to request more information.
7. Close your browser.

Request a License File

Customers and partners can submit PureConnect license file requests through the Genesys Activation File Request Tool. You can also use this tool to communicate with the Genesys Licensing Team about licensing-related issues.

Note: If you need Subscription or Mixed Estate activation files, you must submit a request using this tool because only Genesys Licensing can generate these types of activation files.

To request a license file

1. [Open the Activation File Management Tool](#) and then, on the **Manage Activation Files** page, click **Non Perpetual Activation File Request**. The **Welcome to the Genesys Activation File Request Tool** page appears.

Note: To access the Genesys Activation File Request Tool using a direct link that doesn't require logon credentials, open <https://genesys.secure.force.com/activationfile> in your browser.

Welcome to the Genesys Activation File Request Tool

Please use this tool to communicate with the Genesys Licensing Team about licensing-related issues.

Step 1 – Complete Request Details

Enter contact details, account details and choose to submit either a 'Question' or an 'Activation File Request.'

If choosing an Activation File Request, select a 'Category':

- Genesys Environment
- Third-Party Products
- Pay-Per-Use or Hosted Environments

You can then choose the 'File Type' you need (ie. New Deployment, Evaluation, etc.). Based on your selections, the system will guide you to complete the important details the Licensing Team will need to process your request.

Step 2 – Add Attachments

The system will suggest you include certain attachments based on the Request Details you have entered.

Tip! Enter the **Genesys Account Reference Number (GARN)** and as much detail as possible in the form to allow for the quickest turnaround time. Your End User GARN can be found on your Software Fulfillment Notice, on your Genesys Sales or Maintenance Renewal Quote, or you can contact your Sales or Genesys Care representative.

Note: You will require a corporate email to submit the request.

Continue

2. Click **Continue**. The **Step 1 – Complete Request Details** page appears. If you accessed the tool from the "My Support Dashboard" or the "Partner Network" portal, the system might populate some of the boxes.

Step 1 – Complete Request Details

Request Summary

| | |
|---|--|
| First Name <input type="text"/> | Corporate Email <input type="text"/> |
| Last Name <input type="text"/> | Confirm Corporate Email <input type="text"/> |
| End User Account <input type="text"/> | Additional Email Recipients <input type="text"/> |
| Sold To Account <input type="text"/> | Work Phone <input type="text"/> |
| End User GARN <input type="text"/> | Employer <input type="text"/> |
| Request Type --None-- | |
| Subject <input type="text"/> | |
| Description <div style="border: 1px solid #ccc; height: 40px; width: 100%;"></div> | |
| Date Needed <input type="text" value="3/20/2019"/> | |
| Date Reasoning <div style="border: 1px solid #ccc; height: 40px; width: 100%;"></div> | |

First Name: Contact person's first name.

Last Name: Contact person's last name.

End User Account: End user account for this request.

Sold to Account: Partner or direct customer account that received the Genesys invoice.

End User GARN: Your Genesys Account Reference Number. You can find this number on your Software Fulfillment Notice or your Genesys Sales or Maintenance Renewal Quote. You can also contact your Sales or Genesys Care representative for assistance.

Request Type

Question: Indicates that you have a question for Genesys Licensing.

Activation File Request: Indicates that you are requesting a license file.

Activation File Category: If you selected "Question" as the request type, this list box isn't available.

Genesys Activation File: Indicates that you are requesting a license file for a Genesys product.

Third Party Activation File: Indicates that you are requesting a license file for a third-party product.

Pay Per Use/Hosted Activation File: Indicates that you are requesting a pay-per-use, hosted, or subscription license file.

Activation File Type: Type of license file, such as New Deployment or Upgrade. If you selected "Question" as the request type, this list box isn't available.

Subject: Short description of your request or question.

Description: Details regarding your license file request or the question that you are asking.

Urgent: If selected, your request is urgent and requires immediate attention. If you selected "Question" as the request type, this check box isn't available.

Date Needed: Date that you need the license file or answer to your question.

Date Reasoning: Reason that you need the license file or answer by the date specified.

Corporate Email: Your corporate email address.

Confirm Corporate Email: Your corporate email address, to ensure that you typed it correctly.

Additional Email Recipients: Email addresses of others to include in responses to this request.

Work Phone: Your work phone number.

Employer: Name of your employer.

3. Complete the information in the **Request Summary** section. For an Activation File Request, another section appears on the page based on the **Activation file Category** and **Activation File Type** that you selected, requesting one or more of the following:

Primary MAC ID or Host ID: Unique code that identifies the IC server or the host ID for the PureConnect production server.

Backup MAC ID or Host ID: Unique code that identifies the IC server or the host ID for the PureConnect switchover server.

Deployment Type: Type of deployment for which you are requesting a license file. For example, production, lab, test, disaster recovery cold standby, or disaster recovery hot standby.

Environment Type: Not applicable to PureConnect.

Expiration Date: Not applicable to PureConnect.

Expiration Date of the Hosting Contract: Not applicable to PureConnect.

Implementation Type: Type of implementation for which you are requesting a license file. For example, add-on, migration, new deployment, reallocation, temporary, or upgrade.

IVR Configuration: Not applicable to PureConnect.

MAC ID or Host ID: Unique code that identifies the IC server.

Max Number of Estimated Ports: Not applicable to PureConnect.

New Extension Date Requested: Not applicable to PureConnect.

O/S: Not applicable to PureConnect.

PBX/SIP: Not applicable to PureConnect.

Please clarify your request: More information regarding your request.

Port Type: Not applicable to PureConnect.

Primary MAC ID BC DR: Not applicable to PureConnect.

Backup MAC ID BC DR: Not applicable to PureConnect.

SO# or PO#: Product sales or purchase order number.

Third Party Activation File Type: Type of third-party license file that you are requesting. For example, Nuance or Zoom.

4. If another section appears on the page, complete the information and then click **Submit and Continue**. The system assigns an Activation File Request (AFR) number to the request and displays the **Step 2 - Add Attachments** page.

GENESYS

Step 2 – Add Attachments

AFR-0039604

Request Type: Activation File Request

Subject: Test

Request Attachments

Please upload your **Original Activation File** (if applicable) and any other files that may be helpful in the processing of your request.

File: No file chosen

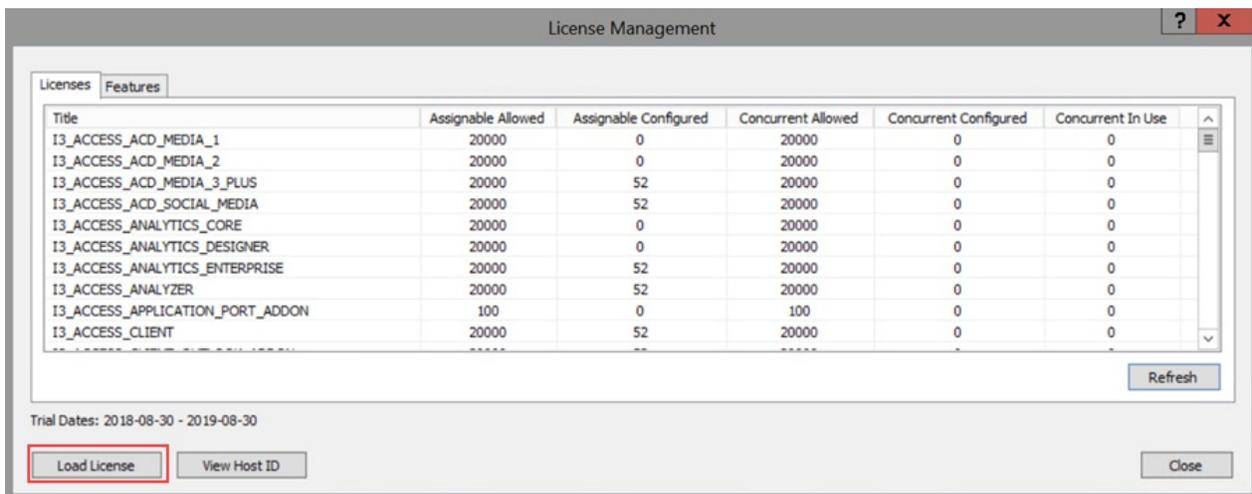
5. To attach files to the request, do the following:
 - a. Click **Browse...**
 - b. In the **Open** dialog box, click the file to attach and then click **Open**.
 - c. On the **Step 2 - Add Attachments** page, click **Upload Attachment**.
 - d. Attach more files as necessary.
6. Click **Done**. The system sends a confirmation email to the email addresses that you provided. You can reply to the confirmation email to provide updates to the Genesys Licensing team. A Genesys Licensing Analyst will contact you to provide the requested file, provide a response to your question, or to request more information.
7. Close your browser.

Load the License File

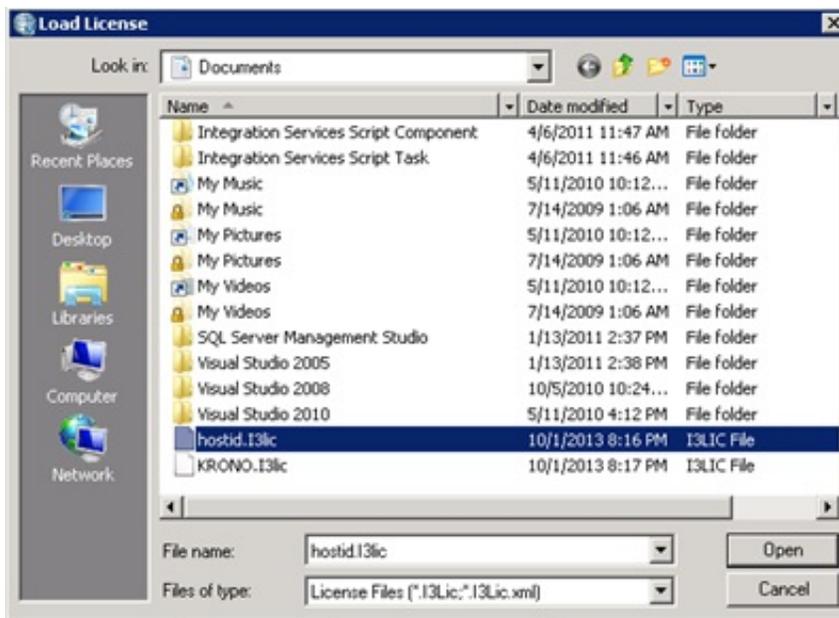
After you [update your existing license](#), you are ready to load the license file.

To load the license file

1. In Interaction Administrator, on the **File** menu, click **License Management**. The **License Management** dialog box appears.



2. Click **Load License**. The **Load License** dialog box appears.



3. In the **File Name** list box, click the name of the license file that you downloaded and then click **Open**. When the license file loads, a confirmation message appears.
4. Click **OK**. The updated license information appears in the **License Management** dialog box.

Note: The switchover subsystem determines that the license file that you created is a switchover bundled license and contains the information for both servers. It replicates the license to the backup server automatically. If any errors occur, check the Windows Application Event log on the primary and backup IC servers to confirm whether the license applied correctly.

Sales Orders and Billing

How sales orders are related to licenses

The Genesys sales order process is based on part numbers. Genesys maps these part numbers internally to the appropriate PureConnect licenses to ensure that all appropriate capabilities and features are enabled for use.

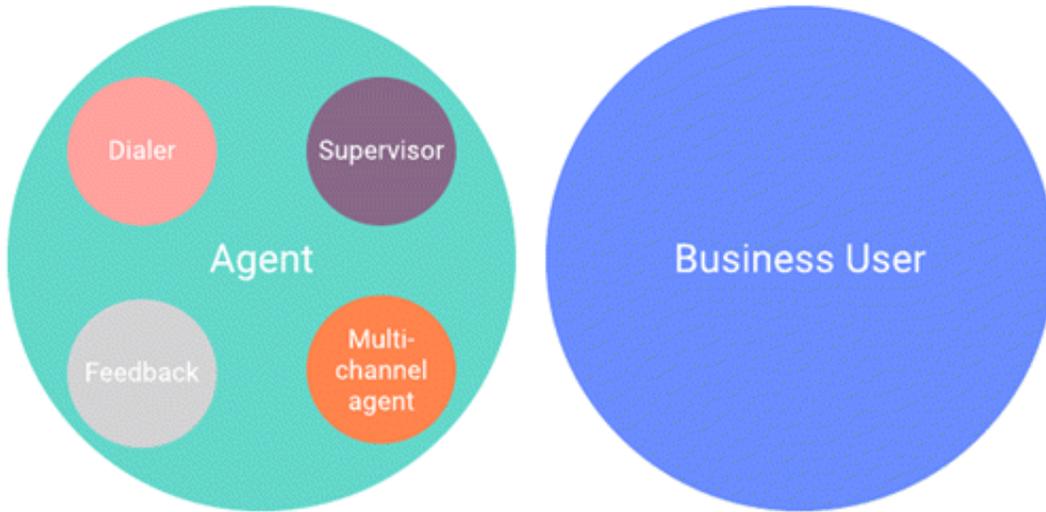
The following table provides examples of keys in the license file that apply to a user or station.

| Access Licenses | | | | |
|------------------------|-----------------------------|---------------------------|-------------------------------|---|
| 4.0 Part Number | Number of Assigned Licenses | Number of Pooled Licenses | Description | 4.0 Key |
| SW-001-4.0-AL01 | 0 | 25 | Basic Station | I3_LICENSE_BASIC_STATION (1) |
| SW-001-4.0-AL02 | 5 | 0 | Business Client | I3_LICENSE_BASIC_STATION (1) I3_ACCESS_CLIENT (1) |
| SW-001-4.0-AL03 | 5 | 25 | Phone-only Call Center | I3_LICENSE_BASIC_STATION (1) I3_ACCESS_ACD_MEDIA_1 (1) |
| SW-001-4.0-AL04 | 5 | 25 | Contact Center Level 1 | I3_LICENSE_BASIC_STATION (30) I3_ACCESS_CLIENT (5) I3_ACCESS_ACD_MEDIA_1 (5) I3_ACCESS_CLIENT_CONCURRENT (25) I3_ACCESS_ACD_MEDIA_1_CONCURRENT (25) |
| Access Add-on Licenses | | | | |
| SW-001-4.0-AA01 | 2 | 0 | Interaction Supervisor Add-on | I3_ACCESS_DIALER_SUPERVISOR_PLUGIN (1) I3_ACCESS_WORKGROUP_SUPERVISOR_PLUGIN (1) I3_ACCESS_HISTORICAL_REPORT_SUPERVISOR_PLUGIN (1) |
| SW-001-4.0-AA02 | 1 | 1 | Interaction Scriptor Add-on | I3_ACCESS_INTERACTION_SCRIPTER_ADDON (1) |
| SW-001-4.0-AA17 | 2 | 2 | Interaction Report Assistant | I3_ACCESS_REPORT_ASSISTANT_SUPERVISOR_PLUGIN (1) |

How license assignment impacts billing

Users and add-ons

License usage for PureConnect has two main categories: **Agent** and **Business User**. These categories are mutually exclusive in that a particular user cannot count as both an agent and a business user. A user's assigned licenses establish the user as either an Agent or Business User. PureConnect considers all other license usage categories as add-ons for Agents only. If PureConnect counts a user for any particular agent add-on, PureConnect cannot count that user as a business user.



Usage calculation examples

- User Tina logs on and has the `I3_CLIENT_ACCESS` license (and nothing else). Tina's license category for her active session is BUSINESS USER.
- User Sam logs on and has the `I3_CLIENT_ACCESS` and `I3_ACCESS_ACD_MEDIA_1` licenses. Sam's license category for his active session is AGENT.
- User Jane logs on and has the `I3_CLIENT_ACCESS`, `I3_ACCESS_ACD_MEDIA_1`, `I3_ACCESS_ACD_MEDIA_3_PLUS`, and `I3_ACCESS_FEEDBACK` licenses. Jane's license categories for her active session are AGENT, MULTI-CHANNEL, and FEEDBACK.

Categories and licenses

Agent and Business User categories

| Category | Licenses |
|---------------|---|
| Business User | <code>I3_CLIENT_ACCESS</code> (and none of the following licenses) |
| Agent | <code>I3_ACCESS_ACD_MEDIA_1</code> or any add-on license Example add-on licenses: <ul style="list-style-type: none"> • <code>I3_ACCESS_ACD_MEDIA_3_PLUS</code> • <code>I3_ACCESS_FEEDBACK</code> • <code>I3_ACCESS_DIALER_ADDON</code> • <code>I3_ACCESS_RECORDER_QUALITYMONITORING</code> • <code>I3_ACCESS_RECORDER_QUALITYMONITORING_AGENT</code> • ALL SUPERVISOR LICENSES |

Agent add-on categories

Each license that you assign to a user impacts your monthly bill. We recommend that you only assign the licenses that the users needs.

Important!

Genesys updates these mappings for every release; therefore, the following list is not a definitive legal statement of exactly what Genesys does. Once a new license appears in MyCloud, that's when it impacts your bill. For more information about accessing and using MyCloud, see the [MyCloud Self-service](#) documentation.

| Add-on Category | Licenses |
|-----------------------|---|
| Analyzer | I3_ACCESS_ANALYZER |
| CX Insights | I3_ACCESS_ANALYTICS_CORE |
| Dialer | I3_ACCESS_DIALER_ADDON |
| Feedback | I3_ACCESS_FEEDBACK |
| Multi Channel | I3_ACCESS_ACD_MEDIA_3_PLUS |
| Quality Manager | I3_ACCESS_RECORDER_QUALITYMONITORING I3_ACCESS_RECORDER_QUALITYMONITORING_AGENT |
| Recorder | I3_ACCESS_RECORDER |
| Salesforce Agent | I3_LICENSE_SALESFORCE, I3_LICENSE_SALESFORCE_BUSINESSUSER |
| Social Media ACD | I3_ACCESS_ACD_SOCIAL_MEDIA |
| Supervisor | I3_ACCESS_WORKGROUP_SUPERVISOR_PLUGIN I3_ACCESS_DIALER_SUPERVISOR_PLUS I3_ACCESS_HISTORICAL_REPORT_SUPERVISOR_PLUGIN I3_ACCESS_REPORT_ASSISTANT_SUPERVISOR_PLUGIN I3_ACCESS_SYSTEM_STATUS_SUPERVISOR_PLUGIN |
| Web Portal Agent | I3_ACCESS_IWP_USER_AGENT |
| Web Portal Supervisor | I3_ACCESS_IWP_USER_ENTERPRISE |

Events and concurrent use

All usage tracking is based on watching for events - specifically logon and logoff events. The system doesn't take the logged-on application or status into account in determining usage, just the applied licenses. When an event occurs, PureConnect looks at all the licenses that are active for a particular user and stores that in memory. For example, if an agent logs on to Interaction Connect, the system may find that they also have a supervisor license, a dialer license, or any other number of applied licenses. The system tracks concurrent use by determining whether the user is logged on to any application at a given time.

Important!

The system doesn't care what application the user logged on to. It only cares about the licenses applied to the user and the time frames in which the user was logged on.

For example, the following table shows that John Smith was logged on with an active session from 8am to 4:30pm with I3_CLIENT_ACCESS, I3_ACCESS_ACD_MEDIA_1, and I3_ACCESS_RECORDER licenses. Active sessions apply towards the billing count.

| Time | Event | Application | Applied Licenses | User Session Counter | Status is... | Active Session? |
|-----------|---------|-------------|---|----------------------|----------------|-----------------|
| 8 a.m. | Log on | ICBM | I3_CLIENT_ACCESS I3_ACCESS_ACD_MEDIA_1 I3_ACCESS_RECORDER | 1 | Gone home | Yes |
| 8:30 a.m. | Log on | Connect | I3_CLIENT_ACCESS I3_ACCESS_ACD_MEDIA_1 I3_ACCESS_RECORDER | 2 | Available | Yes |
| 3 p.m. | Log off | ICBM | I3_CLIENT_ACCESS I3_ACCESS_ACD_MEDIA_1 I3_ACCESS_RECORDER | 1 | Away from desk | Yes |
| 3:30 p.m. | Log on | Desktop | I3_CLIENT_ACCESS I3_ACCESS_ACD_MEDIA_1 I3_ACCESS_RECORDER | 2 | Available | Yes |
| 4 p.m. | Log off | Connect | I3_CLIENT_ACCESS I3_ACCESS_ACD_MEDIA_1 I3_ACCESS_RECORDER | 1 | Gone home | Yes |
| 4:30 p.m. | Log off | Desktop | I3_CLIENT_ACCESS I3_ACCESS_ACD_MEDIA_1 I3_ACCESS_RECORDER | 0 | Gone home | No |

Usage tracking

MyCloud is a self-service web portal that allows PureConnect customers to view and administer their PureConnect Cloud service. You can complete several common move, add, and change (MAC) administrative tasks from the MyCloud interface, and you can complete others using a Terminal Service Remote Access (TSRA) session.

For more information about accessing and using MyCloud, see the [MyCloud Self-service](#) documentation.

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License Management in PureConnect Applications

Licensing in IC Setup Assistant

During CIC installation, IC Setup Assistant requires the valid CIC 4.0 license file that you generated and downloaded from the Activation File Management Tool, as described in [Generate a Production License](#) and [Download the License File](#). By default, IC Setup Assistant looks in the \3\IC directory for your license file (xxx.I3Lic).

You must have an appropriate license for your version of CIC. Your license defines what version, server components, and quantities are in your agreement. For more information about selecting your license file, see [Select the license file](#) in the *IC Setup Assistant help*.

If you have any questions about your license or to resolve any licensing issues, contact your reseller.

[PureConnect Licensing Technical Reference](#)

Licensing in Interaction Administrator

In Interaction Administrator, you can view and allocate your available licenses without interrupting service or restarting the system. You don't need to schedule downtime to add a feature, just allocate the appropriate license.

Basic Station license allocation

You allocate the Basic Station license to stations only; one station at a time or multiple stations at once. For more information, see [Station Licensing Settings](#) and [License Configuration](#) in the *Interaction Administrator help*.

Access license allocation

You license features by user, station, or both. For more information, see [License Configuration](#) in the *Interaction Administrator help*.

Remote station licensing

CIC supports two types of remote stations:

- Configured (static) Remote stations are Remote station types with a single remote phone number for all calls to the remote user's extension. These stations use a Basic Station license. If the Remote station is using a trunk, however, it does not require a session.
- Dynamic Remote stations allow traveling users to connect to the IC server and place or receive calls from any remote location. The system looks for an available Basic Station license to process Dynamic Remote station logons. If there are no available Basic Station licenses, the system rejects the logon attempt.

For more information, see [Station Licensing Settings](#) in the *Interaction Administrator help*.

ACD workgroup queues

You license ACD users based on how many media can be in the workgroup queue in which that user is participating.

The following license rules apply:

- **Media 1** - You can only choose one type of interaction to queue to a user. Users can only participate in workgroup queues that have one object type (for example, phone calls) in the queue. Do not put a user in a workgroup that has a queue with more than one object type routing through that workgroup queue.
- **Media 2** - You can select two types of interactions to queue to a user. Users can only participate in workgroup queues that have one or two objects in the queue. Do not put a user in a workgroup that has a queue with more than two objects routing through that workgroup queue.
- **Media 3** - You can select more than two types of interactions to queue to a user. Users can be members of any workgroup queue.

For more information, see [Station Licensing Settings](#) and [Licensing](#) in the *Interaction Administrator help*.

Notes:

- CIC incorporates licensing for Contact Center 1, 2, and 3 licenses. Ensure in advance that you licensed your users correctly for the number of media types they handle. If not licensed appropriately, they cannot pick up the interactions they see in the queue.
- If you configure a user with a Media 1 level ACD Access license and the user is a member of a workgroup queue that supports other media types, when the user logs on to the client, the system determines this user doesn't have sufficient licensing to receive all the media types available in the workgroup. A warning message appears, stating that the system limits the ACD interaction types that the user receives until you resolve the licensing problem.
- A warning message appears, for example, when an ACD Media Level 1 user has licensing for emails only, and the user's assigned workgroup requires only calls.
- Users can only process workgroup interactions for their configured interaction types, through IA licensing configuration. For example, if all the interaction types of the workgroups that the user is a member of are not available in the Level 1 or Level 2 user licensing configuration, a warning message appears to an ACD Media Level 2 user.

For more information about ACD routing, see the [CIC ACD Processing Technical Reference](#).

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Troubleshooting

Examples of issues that you may encounter include:

- You confirmed that you are using the correct license file, whether it is an original license or an upgrade license, and the install doesn't continue.
- You cannot locate your license file because the install did not copy it to the i3IC directory.

For more information about licensing issues during installation, see the [PureConnect Installation and Configuration Guide](#).

If you have questions concerning the terms of your agreement, contact your reseller.

If you need assistance generating a license, or have a license-related question, click **Activation File Related Question** in the Activation File Management Tool. For more information, see [Activation File Management Tool](#).

The screenshot shows the Genesys My Support interface. At the top, there is a navigation bar with 'My Cases', 'Dashboard', 'Announcements', 'FAQ', 'Documentation', and 'Contact Us'. A red arrow points to the 'Activation File Related Question' button in the top navigation area. Below this, there is a 'Manage Activation Files' section with a 'GO' button and a 'Support Option: Unknown' indicator. The main content area has tabs for 'Account Summary', 'Software Details', 'Activation File Activity', 'Upgrade Software', 'New Activation File', and 'Install Sites'. The 'Account Summary' tab is active, showing a table of installation sites. The table has columns for 'Part Number', 'Product Category', 'Description', 'Total', 'Used', and 'Available'. There are 7 total results.

| Part Number | Product Category | Description | Total | Used | Available |
|---|------------------|--|-------|------|-----------|
| SW-001-4.0-AL02 I3_ACCESS_CLIENT (1 assigned, 0 pooled) I3_LICENSE_BASIC_STATION (1 assigned, 0 pooled) | CIC 4.0 | Business Client | 50 | 50 | 0 |
| SW-001-4.0-AL06 | CIC 4.0 | Contact Center Level 3 | 125 | 120 | 5 |
| SW-001-4.0-IDS2 | CIC 4.0 | Large PureConnect On Premise development system - Included w/ Server | 1 | 0 | 1 |
| SW-001-4.0-PL04 | CIC 4.0 | Advanced Session | 101 | 100 | 1 |
| SW-001-4.0-PL06 | CIC 4.0 | Conference Session | 101 | 100 | 1 |
| SW-001-4.0-PL09 | CIC 4.0 | Media Session | 169 | 120 | 49 |
| SW-001-4.0-SL03 | CIC 4.0 | Intermediate Server | 1 | 1 | 0 |

Appendix A: Subscription Billing Usage Data

Overview

Starting with PureConnect 2018 R2 Patch 2, subscription billing is available to new on-premises customers. PureConnect collects usage data for subscribers in encrypted files and uploads the data automatically, for billing purposes. Billing data for subscribers appears in MyCloud. Subscription customers must have a subscription agreement with Genesys.

Starting with PureConnect 2020 R2, a virtual cloud licensing option is available for customers who want to use licensing that doesn't associate to a physical computer. This option requires a Genesys Cloud organization and a connection between PureConnect and Genesys Cloud. Virtual cloud licensing requires the use of the automated upload option.

Usage subsystem

A usage subsystem for subscription billing installs as part of the PureConnect install. It creates encrypted usage (.usg) data files daily. The usage files are in the "i3\ic\work\usage" directory.

Required disk space

The amount of disk space needed for the usage files varies depending on the number of logons per user per day. For most customers, the file is less than 3 MB per day, while the largest customers may see files as large as 10 MB per day.

PureConnect creates one usage file each day for each PureConnect server and creates more usage files when a server restarts.

License keys

For automated uploads, the license file must include one of the following license keys:

- **I3_FEATURE_USAGE_TRACKING_UPLOAD** for the traditional subscription billing method.
- **I3_FEATURE_VIRTUAL_CLOUD** for the virtual cloud method.

Usage tracking upload license

A traditional usage tracking upload license contains a server host ID and associates to a single computer. If you have this type of license, you can use the automated upload method .

Usage tracking upload licensing requires:

- A subscription agreement with Genesys.
- The following license key:
 - **I3_FEATURE_USAGE_TRACKING**
- A connection to the Genesys Amazon S3 location, **us-east-2**.

Virtual cloud license

Genesys introduced virtual cloud licensing in PureConnect 2020 R2 to allow subscription billing customers to use a license that doesn't associate to a physical computer. Virtual cloud licensing requires the automated upload method for uploading your usage data to Genesys Cloud.

Virtual cloud licensing also requires:

- A subscription agreement with Genesys.
- The virtual cloud license key, **I3_FEATURE_VIRTUAL_CLOUD**.
- A connection to the Genesys Amazon S3 location, **us-east-1**.
- A Genesys Cloud organization, which Genesys creates for you.
- A connection between PureConnect and Genesys Cloud. For more information, see the [Genesys Cloud for PureConnect Administrator's Guide](#).

Important!

If you have a Media Server that uses virtual cloud licensing, your CIC server must also use virtual cloud licensing.

The traditional usage tracking upload license option requires the license to contain a host ID and association to a single server.

Automated upload method

The usage files in the `i3\ic\work\usage` directory can upload automatically each day to the Genesys PureConnect Amazon S3 location. Subscription customers must configure firewall rules to allow sending of these files on port 443.

- If you use traditional usage tracking upload licensing, the Amazon S3 location is **us-east-2**.
- If you use virtual cloud licensing, the Amazon S3 location is **us-east-1**.

Because some enterprises block port 443, the automated upload method requires you to verify that your site can access the AWS billing service and no firewalls block the connection. The verification process depends on whether you're using the traditional usage tracking upload licensing or virtual cloud licensing.

AWS billing service access verification for usage tracking upload licensing

To verify access to the AWS billing service when using the usage tracking upload license key, browse to the following FQDNs from your PureConnect servers:

- pureconnectusage.s3.amazonaws.com
- pureconnectusage.s3-us-east-2.amazonaws.com

If successful, the following message appears:

This XML file does not appear to have any style information associated with it. The document tree is shown below.

```
<?xml version="1.0" encoding="UTF-8" ?>
<Error>
  <Code>AccessDenied</Code>
  <Message>Access Denied</Message>
  <RequestId>566E120C558ED4C5</RequestId>
  <HostId>
    yyCMco8gBUZlsHSsG9EIjLOHjhV/AuVsgC2FjNkAhUOH6DF3ziDKuTnJQ53po2fS+muLKRIiQDU=
  </HostId>
</Error>
```

If you see a time-out error instead, try browsing to the following AWS FQDNs:

- s3.us-east-2.amazonaws.com
- s3-us-east-2.amazonaws.com
- s3.dualstack.us-east-2.amazonaws.com
- s3.amazonaws.com

If still not successful, see "Troubleshooting."

AWS billing service access verification for virtual cloud licensing

To verify access to the AWS billing service when using the virtual cloud license key, browse to the following FQDNs from your PureConnect servers:

- genesys-premise-billing.s3.amazonaws.com
- genesys-premise-billing.s3.us-east-1.amazonaws.com

If successful, the following message appears:

This XML file does not appear to have any style information associated with it. The document tree is shown below.

```
<?xml version="1.0" encoding="UTF-8" standalone="yes" ?>
<Error>
  <Code>AccessDenied</Code>
  <Message>Access Denied</Message>
  <RequestId>566E120C558ED4C5</RequestId>
  <HostId>
    yyCMco8gBUZ1sHSsG9EIjLOHjhV/AuVsgC2FjNkAhUOM6DF3ziDKuTnJQ53po2fS+muLKRIiQDU=
  </HostId>
</Error>
```

If you see a time-out error instead, try browsing to the following AWS FQDNs:

- s3.us-east-1.amazonaws.com
- s3-us-east-1.amazonaws.com
- s3.dualstack.us-east-1.amazonaws.com
- s3.amazonaws.com

If still not successful, see "Troubleshooting."

Troubleshooting

FQDN

If you cannot browse to the additional FQDNs, ensure that they are DNS resolvable. Resolve any DNS errors locally and then repeat the access verification steps.

If you still see a time-out error, use the information at this site to whitelist the service in your firewall: <https://docs.aws.amazon.com/general/latest/gr/aws-ip-ranges.html>. The site provides a downloadable XML file that contains public IP addresses. After you whitelist the service, repeat the access verification steps.

Proxy server

If your environment requires a Proxy server for outbound traffic, define the optional server parameter "Forward Proxy Uri" for the Usage service to use as a proxy server.

Appendix B: Virtual Cloud Enforcement

The presence of the virtual cloud license key `I3_FEATURE_VIRTUAL_CLOUD` in a PureConnect license file triggers a requirement on a connection to Genesys Cloud.

A PureConnect server subsystem attempts to connect to Genesys Cloud through the Genesys Cloud Public API at 12 hour intervals. If the connection is successful, Genesys Cloud responds to the PureConnect subsystem with a message indicating that it's in "good standing." On startup and switchover, a PureConnect server subsystem checks to see whether there was a recent successful "good standing" response from Genesys Cloud. If there wasn't, the PureConnect server begins to generate warnings and eventually degrades the PureConnect server's functionality.

Note: If you don't have Genesys Cloud configured in Interaction Administrator, attempts to check the system fail.

Important values

The following values are critical to cloud connection enforcement:

- **Ramp Date** - Date in the license file that determines when enforcement starts. No cloud connection enforcement rules process until the ramp date expires. Ensure that your system is installed, running, and uploading usage data daily before the ramp date expires.
- **Grace Period** - Number of days your system can run before cloud connection enforcement rules start to impact the server. PureConnect uses the grace period to determine the length of time that your system stays in the current stage. If no system check-ins occur, your system advances to the next stage.

Enforcement stages

The following table lists the cloud connection enforcement stages that your system could encounter based on your system's current state, the ramp date, and the grace period.

| Stage | Occurs when... |
|--|--|
| Fully functional. | Your system meets the enforcement rules or the ramp date hasn't expired. |
| Non-obtrusive warning displays in the status bar in Interaction Administrator. | Your system doesn't meet the enforcement rules, the ramp date has expired, and the initial grace period has expired. |
| Obtrusive warning displays in Interaction Administrator. | Your system doesn't meet the enforcement rules and the first grace period extension has expired. |
| Interaction Supervisor is disabled. | Your system doesn't meet the enforcement rules and the second grace period extension has expired. |
| System is limited to 20% of licensed call ports. | Your system doesn't meet the enforcement rules and the third grace period extension has expired. |
| System is disabled and the server reverts to an unlicensed state; only two call ports are available. | Your system doesn't meet the enforcement rules and the final grace period extension has expired. |

To return your system to the fully functional stage, ensure that your system is in "good standing" by verifying that your server is connected to the network and Internet. When the system can complete a successful check to Genesys Cloud, the system resets the grace period.

Enforcement example

The following is an example only. Your dates and grace period may vary.

License issue date: 05/01/2020

Ramp date: 06/01/2020

Grace period: 7 days

The customer has from May 1st to May 31st to install their PureConnect server and get it running. Enforcement rules don't process during this period. The system is at the fully functional stage.

- On June 1st, the ramp date expires and the grace period starts.
- On June 8th, if the system doesn't meet the enforcement rules by the end of the grace period, it moves to stage two enforcement and shows a non-obtrusive warning in Interaction Administrator's status bar.
- On June 15th, if the system doesn't meet the enforcement rules by the end of the grace period, it moves to stage three enforcement and shows an obtrusive warning in Interaction Administrator.
- On June 22nd, if the system doesn't meet the enforcement rules by the end of the grace period, it moves to stage four enforcement and disables Interaction Supervisor.
- On June 29th, if the system doesn't meet the enforcement rules by the end of the grace period, it moves to stage five enforcement and limits the system to 20% of licensed call ports.
- On July 6th, if the system doesn't meet the enforcement rules by the end of the grace period, it moves to stage six enforcement and reverts the system to an unlicensed state. Only two call ports are available.

During the enforcement process, if the customer remedies the issue and their server check-ins, enforcement resets and the seven-day grace period starts over. If the customer does not remedy the issue and their server doesn't "check in," every seven days the system advances to the next stage until the system becomes disabled.

Copyright and trademark

Change Log

The following table lists the changes to the *PureConnect Licensing Technical Reference* since CIC 4.0 product availability.

| Date | Changes |
|-------------------|---|
| 12-March-2012 | Added a reference to the CIC 4.0 License Upgrade Guide |
| 27-June-2012 | General edits for UI controls |
| 25-February-2013 | Updated Copyright and Trademarks |
| 11-November-2013 | Added new content for license types (non-ordered small development, non-ordered large development, ordered small development, ordered large-development). Updated screenshots. Updated formatting and wording as per new template and Acrolinx. |
| 23-April-2014 | Minor updates to fix typos |
| 29-July-2014 | Updated documentation to reflect changes required in the transition from version 4.0 SU# to CIC 2015 R1, such as updates to product version numbers, system requirements, installation procedures, references to the Product Information site URLs, and copyright and trademark information. |
| 24-September-2014 | Updated licensing information for 2015 R1. |
| 12-January-2015 | Add table of add-on licenses and descriptions. Updated copyright and trademark information. |
| 03-March-2015 | Updated Virtualized Interaction Media server section. Updated copyright and trademark page. |
| 21-August-2015 | Updated documentation to reflect the addition of two CIC client applications, Interaction Desktop and Interaction Connect. Updated cover page and screen shots for rebranding. |
| 11-April-2017 | Removed reference to Interaction Client .Net Edition and Interaction Client Web Edition. |
| 28-April-2017 | Removed reference to Interaction Client Mobile Edition. |
| 15-March-2018 | <ul style="list-style-type: none"> • Rebranded to Genesys. • Added link to "CIC 4.0 License Upgrade Guide" to the "New and discontinued licenses" section. |
| 06-September-2018 | <ul style="list-style-type: none"> • Genesys replaced the License Management System with the Activation File Management Tool. Updated procedures and graphics accordingly. • The anniversary date and re-registration process is no longer applicable because PureConnect now uses perpetual software licenses with an expiration date of 1/1/2100. Removed the "Anniversary date and licensing behavior" and the "Appendix A: License warnings and behavior" sections accordingly. |
| 03-April-2019 | Added instructions for requesting an activation file. |
| 24-April-2019 | Reorganized the content only, which included combining some topics and deleting others that just had an introductory sentence such as, "In this section..." |
| 07-May-2019 | Removed "New CIC Distribution Model and the CIC license" as the model is no longer new. |
| 25-June-2019 | <p>Removed the note about physical processor chips on the IC server with different CPUID values from Generate a Production License. Genesys licensing no longer supports adding multiple Host IDs at a physical level for a specific server.</p> <p>For information about this capability at a virtual level, see "Hosts with mismatched CPUs, MAC addresses, and licensing" in the CIC Virtualization Technical Reference.</p> |
| 07-October-2019 | Updated Access License Key Examples to include examples for Concurrent licenses for part #: SW-001- 4.0-AL04. |

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| 14-May-2020 | Updated the following: <ul style="list-style-type: none">• Rearranged and removed outdated content• Added information about subscription licensing and billing. For more information, see Sales Orders and Billing and Appendix A: Subscription Billing Usage Data.• Added information about virtual cloud enforcement. For more information, see Appendix B: Unlicensed Server Behavior. |
| 10-June-2020 | Corrected the name of the I3_FEATURE_VIRTUAL_CLOUD license key in Appendix A: Subscription Billing Usage Data . |
| 22-June-2020 | Added troubleshooting information for the Proxy server to Appendix A: Subscription Billing Usage Data . |