



PureConnect®

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See [Change Log](#) for summary of changes.



Altocloud Integration

Technical Reference

Abstract

Genesys Altocloud is a customer journey analytics platform that analyzes all kinds of customer journey behavior and data. Your organization can use it to observe and analyze visitors on your digital properties, such as websites. Genesys Altocloud can predict what it will take for visitors to achieve a desirable business outcome, and then it acts to offer the most appropriate and effective channel to assist them in completing their journey.

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

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

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Overview

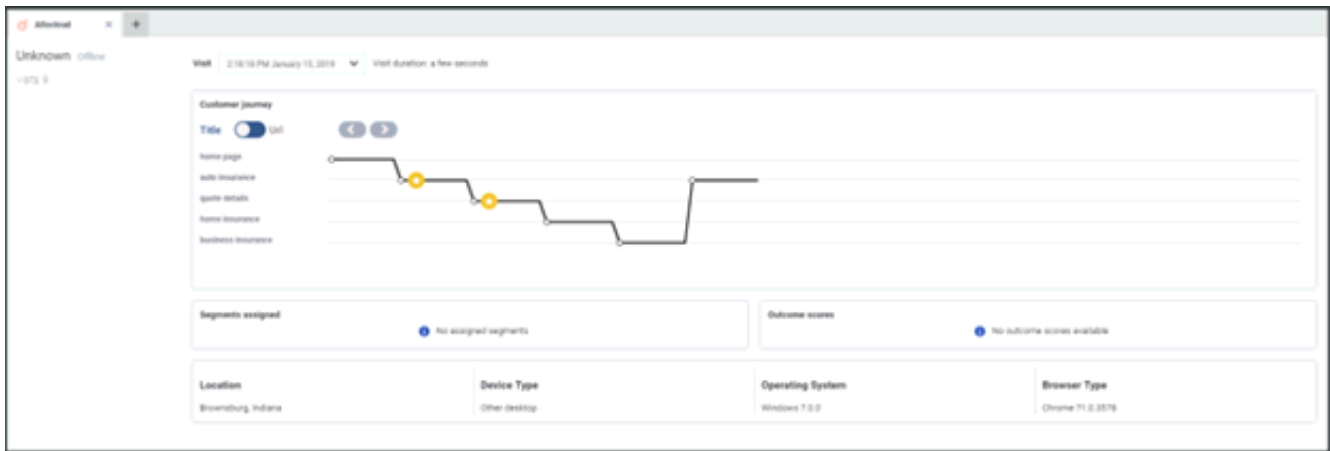
Genesys Altocloud is a customer journey analytics platform that analyzes all kinds of customer journey behavior and data. Your organization can use it to observe and analyze visitors on your digital properties, such as websites. Genesys Altocloud can predict what it will take for visitors to achieve a desirable business outcome, and then it acts to offer the most appropriate and effective channel to assist them in completing their journey.

Altocloud and PureConnect

Altocloud integrates with Interaction Connect, the PureConnect browser-based application where agents handle customer interactions, such as calls, emails, and chats. The integration supports both PureConnect Cloud and PureConnect on-premises customers.

In the integration, a predictive engagement service hosted in on the Genesys Cloud platform determines when to initiate a chat with a website visitor and which workgroup should handle the interaction based on current agent availability. Once Altocloud offers a chat, the chat interaction is created and routed just like any other interaction.

Once a chat is connected to an agent in Interaction Connect, the agent can view a map that outlines the visitor's journey on the website.



For a description of the elements included in the journey map, see [Customer Journey](#) in the Altocloud documentation.

Future versions of the integration will support additional interaction types.

Prerequisites

This document assumes that:

- CIC 2019 R2 patch 3 or higher is installed.
- Your website is Altocloud-enabled.
- The CIC server is configured with the following licenses. To load the license file that contains both licenses, see [Load the Altocloud License File](#).
 - I3_FEATURE_ALTOCLOUD
 - I3_ACCESS_ALTOCLOUD_USER
- A PureCloud organization that is provisioned and linked to the CIC server, with bridges and connectors installed and configured. Your PureCloud organization is created for you and you will receive a welcome email to activate your admin account in PureCloud. The PureCloud organization is provisioned with the following:
 - The base functionality required for your Genesys Cloud integration.
 - An admin console you can use to configure your Genesys Cloud integration.
 - A user with the PureCloud Admin role, which includes default admin permissions, single sign-on, and any integration-specific permissions.
 - A default AI Agent role that provides access to AI services, such as Altocloud.You'll need to have the following information about your organization. See [Access Your Organization in PureCloud](#).
 - Administrator email address
 - Administrator password
 - Organization long name – the name used to create the PureCloud organization
 - Organization short name – the name generated from the organization long name in compliance with DNS restrictions (a-z, 0-9, A-Z)**Note:**

If you are unsure of the organization short name, log in to PureCloud at <https://login.mypurecloud.com> (or other region-based login site) and navigate to **Admin>Account Settings>Organization Settings**. Both the organization long name and short name are listed here.

 - Region

For more information about provisioning your PureCloud organization, see [Configure Your PureCloud Organization](#).

Documentation Resources

This document ties together the various pieces of the integration, from configuration to agents handling Altocloud chats. You may need to access other documentation resources for more information about specific topics. For example, adding views in Interaction Connect, elements of the customer journey map, or licensing in Interaction Administrator.

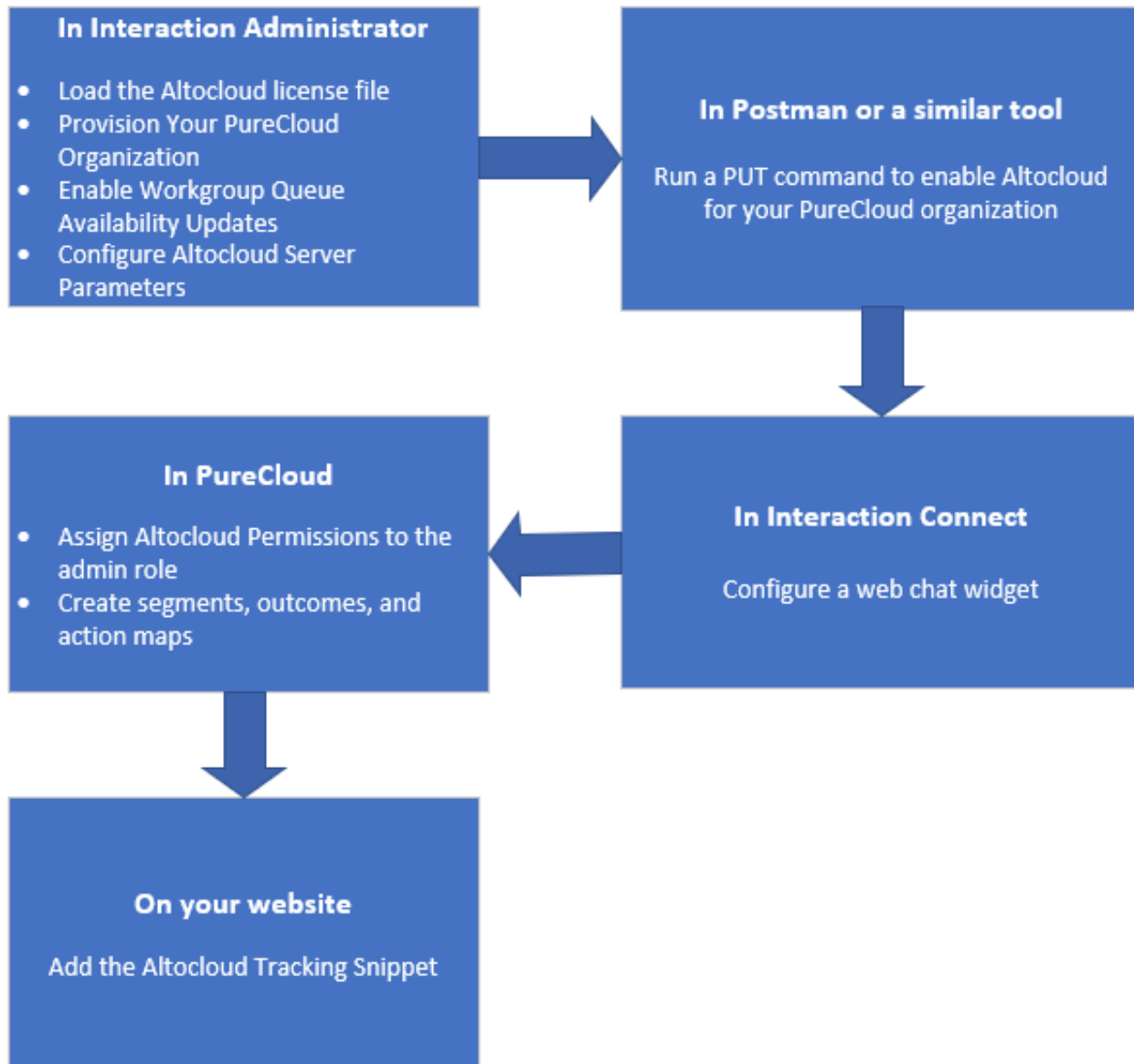
The following is a list of some helpful documentation resources that you may want to consult.

See this:	For:
Altocloud documentation site	General information about Genesys Altocloud.
Genesys Altocloud Administrator's Guide	Information about configuration tasks in the Altocloud Admin UI. Keep in mind that it is not PureConnect-specific and not all features described are included in the PureConnect integration with Altocloud.
Genesys Altocloud Agent's Guide	A description of the elements in the customer journey map. Note that not all features described in the Agent's Guide apply to the PureConnect integration.
Interaction Administrator Help	More information about configuring PureConnect workgroups, assigning licenses, and configuring server parameters.
Interaction Connect Help	Adding the Altocloud view in Interaction Connect and learning about widgets.

Configure the Integration

Configuration Overview

There are several items to configure for the integration, in several different locations. Some of the configuration tasks are documented outside of this technical reference. Links are provided to that information.



In Interaction Administrator:

- Enable the Altocloud server and user licenses. See [Load the Altocloud License File](#).
- Configure or create your PureCloud organization.
- Configure the PureCloud bridge and connectors.
- [Enable Workgroup Queue Availability Updates](#).
- [Configure Altocloud Server Parameters in Interaction Administrator](#).

In Postman or a similar API tool:

- Run a PUT command to enable Altocloud for your PureCloud organization. See [Enable Altocloud for the PureCloud Organization](#).

In PureCloud:

- Assign journey permissions to the admin role.
- [Create Altocloud Segments, Business Outcomes, and Action Maps.](#)

In Interaction Connect:

- Configure a web chat widget. See [PureConnect Widgets](#).

On your website:

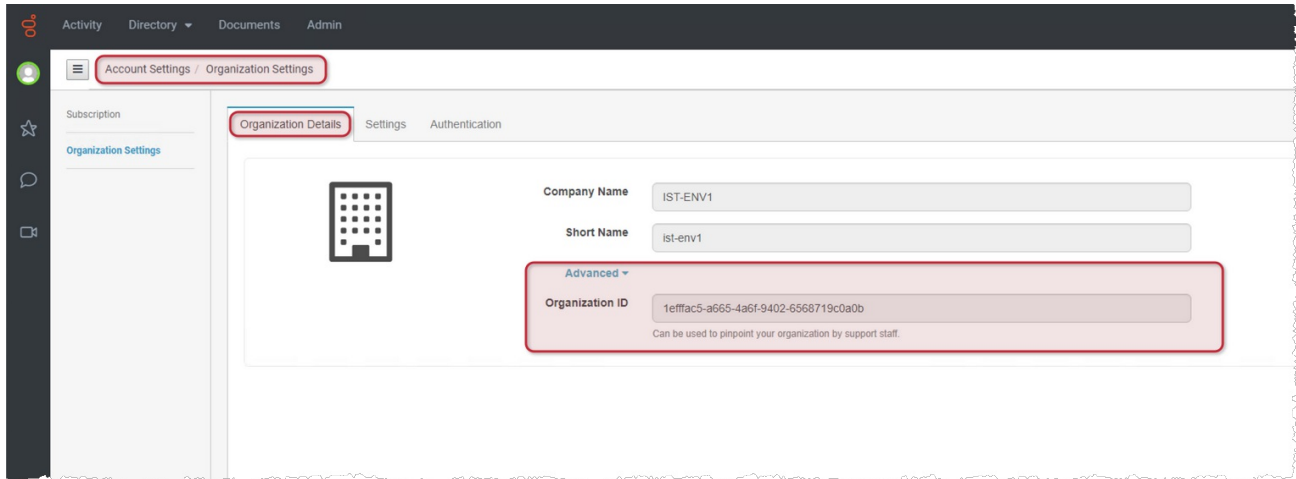
- [Add the Altocloud Tracking Snippet to your Website.](#)

Your PureCloud Organization

Genesys provides you with a PureCloud organization. The organization is configured with default roles and permissions. Contact your Genesys account manager for more information about obtaining your PureCloud organization.

To configure your organization in Interaction Administrator, you'll need some information about it. To find your organization's information:

1. Log in to your PureCloud region using the credentials provided in your Welcome email. For more information about regions, see: <https://developer.mypurecloud.com/api/rest/index.html>
2. In the PureCloud Admin menu, under **Account Settings > Organization Settings**, find your company name and short name, and then click **Advanced** to find your organization ID. You will need this information when you configure your organization in Interaction Administrator. See [Configure Your PureCloud Organization](#).



Default Roles

Your organization includes a PureCloud **Admin** role, which includes the default admin permissions and the journey permissions needed for Altocloud.

The organization also includes a default **AI Agent** role, which provides these permissions and allows agents to access Altocloud.

Ai Agent	Journey > Actionmap > View
Ai Agent	Journey > Actiontarget > View
Ai Agent	Journey > Customer > All
Ai Agent	Journey > Event > Add, Edit, View
Ai Agent	Journey > Outcome > View
Ai Agent	Journey > Report > View
Ai Agent	Journey > Segment > View
Ai Agent	Journey > Session > View
Ai Agent	Journey > Settings > View
Ai Agent	Journey > Visit > All

In addition to the AI Agent role/permissions, agents must have the PureCloud routing permissions.

Routing permissions for agents

This table lists the PureCloud routing permissions available for agents to work with queues and Altocloud.

This permission	Allows these actions
Routing > Agent > On Queue	Go on queue.
Routing > Queue > Join	Join a queue.
Routing > Queue > Search	Search for brief queue information.
Routing > Queue > View	View queues.

Interaction Administrator Configuration

Load the Altocloud License File

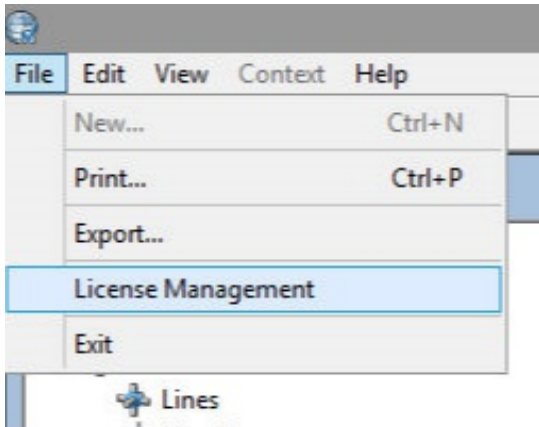
The PureConnect integration with Altocloud requires you to load the license file that Genesys provides you. The file contains these licenses:

The I3_FEATURE_ALTOCLOUD server license turns on the integration for the CIC server.

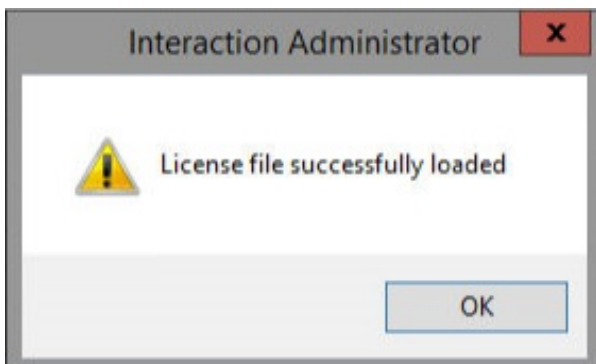
The I3_ACCESS_ALTOCLOUD_USER user license enables an agent to receive interactions initiated by Altocloud.

To load the license file:

1. In Interaction Administrator, open **File > License Management**.



2. Click **Load License**.
3. Browse for the license file, and then click **Open** to load the license.



You must assign the I3_ACCESS_ALTOCLOUD_USER license to each Altocloud user in the Interaction Administrator user configuration on the Licensing tab.

For general information about licensing, see [Licensing Configuration](#) in the Interaction Administrator help or the [PureConnect Licensing Technical Reference](#).

Configure Your PureCloud Organization

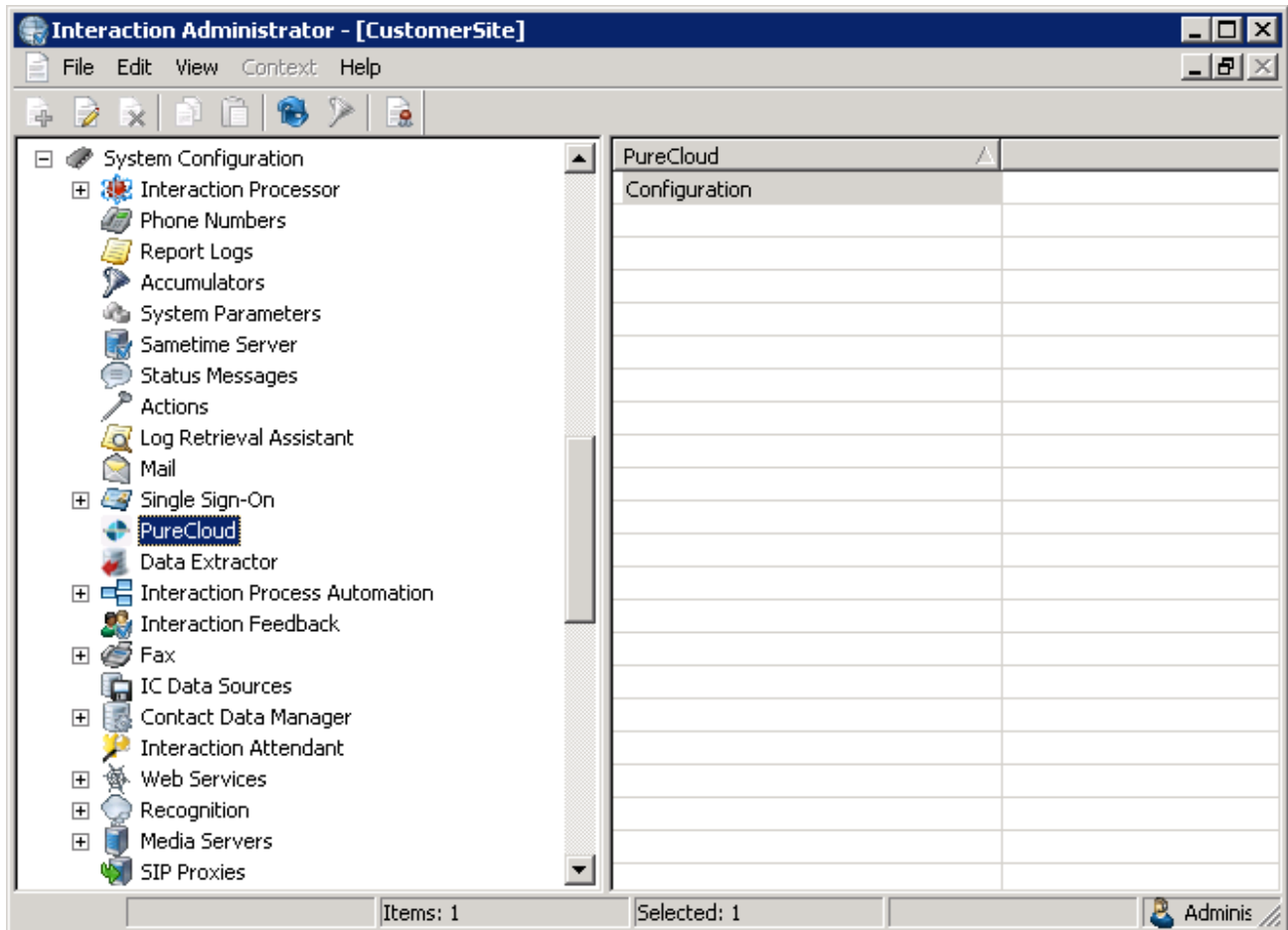
In Interaction Administrator, you must provision your PureCloud organization to integrate with PureConnect. Provisioning involves:

- Enabling the integration.
- Entering your organization's information and region.
- Entering PureCloud admin credentials.
- Specifying the PureCloud bridge location.

Once you provision your PureCloud organization, Interaction Administrator syncs all PureConnect users to PureCloud. Note that synced users do not have default roles assigned in PureCloud. You will need to assign them.

Note: This provisioning procedure will be replaced in a future version of the integration and you may need to migrate to the other version.

1. In Interaction Administrator, under **System Configuration**, click **PureCloud**.



2. In the right-hand view, double-click **Configuration**.
3. On the **PureCloud Configuration** tab, select the **Enable PureCloud Integration** check box.
A message box prompts you to confirm that you understand that PureConnect user information will be synced in a paired PureCloud organization.
4. Click **Yes** in the message box to proceed. The configuration fields in the **PureCloud Configuration** tab are enabled.

5. Enter the PureCloud admin credentials, PureCloud organization name, and region.

PureCloud Configuration

PureCloud Browser Client Applications | PureCloud Dial Groups | Custom Attributes | History

PureCloud Configuration | PureCloud Web Page | Bridge Status

☒ Enable PureCloud Integration Remove Configuration

Administrator Email: t_services@broad.com

Password:

Confirm Password:

Organization Name: Bacabon

Region: North America

Bridge Location: Edit <None Selected>

Test PureCloud Connection

☐ Enable CIC web-based phone Configure CIC web-based phone

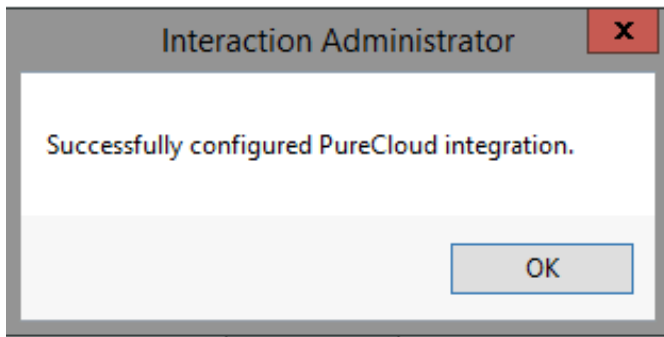
OK Cancel Apply

6. In the **Administrator Email** box, type the administrator email address for the organization.
7. In the **Administrator Password** box, type the PureCloud administrator password.
8. In the **Confirm Password** box, retype the PureCloud administrator password.
9. In the **Organization Name** box, type the organization short name. If you are unsure of the organization short name, log in to PureCloud and navigate to **Admin>Account Settings>Organization Settings**.
10. In the **Region** list, select the closest region to your organization's location. The default is **North America**. All data traffic for this PureConnect installation is routed to the location of the Amazon data center for this region.
11. Click **Edit** next to **Bridge Location** to open the **Bridge Install Location** dialog box.
12. Select the appropriate bridge location, either **Manual Off-Host Install** or **Automatic Local Install**.

We recommend a local bridge for small and medium implementations. PureCloud Bridge will be installed automatically on the CIC server. A local install provides for a better integration experience and allows the CIC server to control the bridge and connectors better during a switchover.

We recommend that large implementations start with a local bridge. After the CIC server runs for a while with a local bridge, you may determine the need for an off-server bridge. You can install an off-server bridge at any time. For more information, see [Bridge Setup Utility](#) in the [PureCloud for CIC Administrator's Guide](#).

13. On the **PureCloud Configuration** tab, click **Apply**.
A message box confirms that the PureCloud organization was successfully configured.



14. Click **OK**. The **Test Connection** button is enabled.
15. Click **Test Connection** to verify that single sign-on works and that the Internet connection to your PureCloud organization is healthy. A message box confirms the successful connection to PureCloud.
16. On the **PureCloud Browser Client Applications** tab, type the URL for the browser application. That is, `https://apps.mypurecloud.com/journey`. And then click **Add**. This authorizes PureConnect to use the PureCloud API. Without it, the Altocloud journey view cannot be displayed in Interaction Connect.
17. Click **OK**.

Enable Workgroup Queue Availability Updates

Before offering a chat to a website visitor, Altocloud first determines if there are agents available to handle the chat. To determine if there are available agents, PureConnect sends estimated wait time (EWT) updates to Altocloud for the available queues. You must enable a workgroup to include it in the updates.

In the workgroup configuration in Interaction Administrator, select **Enable Altocloud queue availability updates** on the **Options** tab. For more information about workgroup configuration options, see [Workgroup Options](#) in the Interaction Administrator help.

Note: PureConnect only sends availability updates for a workgroup when at least one member of the workgroup is licensed for Altocloud and logged in. If no Altocloud-licensed users are logged in, PureConnect does not send updates to Altocloud for that workgroup.

For information about server parameters that affect the behavior of the updates, see [Configure Altocloud Server Parameters in Interaction Administrator](#).

Configure Optional Altocloud Server Parameters in Interaction Administrator

Optional server parameters are available to configure in Interaction Administrator to control the availability updates.

Availability Update Parameters

You can use these server parameters to disable updates or change the rate at which updates are sent:

- **AltocloudPacingRateOverrideMilliseconds** – Without this server parameter in use, PureConnect sends availability updates every five seconds. This parameter allows you to change the rate at which updates are sent. The value assigned to this parameter must be in milliseconds. For example, use 5000 for 5 seconds. 3000 (3 seconds) is the minimum (slowest) value you can assign. There is not a maximum value.
- **AltocloudPacingDisabledUpdates** – If set to yes or 1, the availability updates are turned off.

For more information about availability updates, see [Enable Workgroup Queue Availability Updates](#).

PureCloud Configuration

Access Your Organization in PureCloud

To configure your gather information about your organization in PureCloud, do the following:

1. In PureCloud, click **Admin**.
2. Under **Account Settings**, click **Organization Settings**.
3. On the **Organization Details** tab, click **Advanced** to display the organization ID..
4. If you are configuring your organization for the first time, then copy the **Company Name**, **Short Name** and **Organization ID**. You will need these values to complete your account configuration.

Assign Altocloud Permissions in PureCloud

The Journey permissions in PureCloud are required for the following:

- To send availability updates to Altocloud
- For PureConnect users to load and use the Altocloud journey view in Interaction Connect

To assign the permissions to the admin role::

1. In PureCloud, click **Admin**.
2. Under **People and Permissions**, click **Roles/Permissions**.
3. In the list of roles, click the admin role. If you ran the PUT request in [Enable Altocloud for the PureCloud Organization](#), then you should see Altocloud in the License column.
4. Click the **Permissions** tab.
5. In the search field, type `journey`.
6. Select **journey > All Permissions**.
7. On the Permissions tab, assign all journey permissions to the admin.

The screenshot shows the PureCloud Admin interface. The top navigation bar includes 'Activity', 'Directory', 'Documents', and 'Admin'. The left sidebar has 'People', 'Roles / Permissions', 'Authorized Organizations', and 'Divisions'. The main content area is titled 'People & Permissions / Roles / Permissions / admin'. The 'Permissions' tab is selected. The 'Show:' filter is set to 'All Permissions'. A search bar contains the text 'journey'. Below the search bar, a table lists permissions. The first row, 'journey > All Permissions', is highlighted. The table has columns for 'Permission', 'Description', 'License', and 'Conditions'. The 'License' column for all listed permissions is 'Altocloud'.

Permission	Description	License	Conditions
☒ journey > All Permissions	Assigns all journey permissions, including any future permissions	Altocloud	
☒ journey > actionmap > All Permissions	Assigns all actionmap permissions, including any future permissions	Altocloud	
☒ journey > actionmap > Add	Add Action Map	Altocloud	
☒ journey > actionmap > Delete	Delete Action Map	Altocloud	
☒ journey > actionmap > Edit	Edit Action Map	Altocloud	
☒ journey > actionmap > View	View Action Map	Altocloud	
☒ journey > actiontarget > All Permissions	Assigns all actiontarget permissions, including any future permissions	Altocloud	
☒ journey > actiontarget > Add	Add Action Target	Altocloud	
☒ journey > actiontarget > Delete	Delete Action Target	Altocloud	
☒ journey > actiontarget > Edit	Edit Action Target	Altocloud	
☒ journey > actiontarget > View	View Action Target	Altocloud	

Page < 1 of 3 25 records per page

Create Altocloud Segments, Business Outcomes, and Action Maps

In the Altocloud Admin UI:

- Create *segments* (optional), which let you identify visitors with shared characteristics or behaviors. For more information about segments, see [Segments](#) in the Genesys Altocloud documentation.
- Create *business outcomes* (optional). Altocloud uses your outcomes to analyze which website visitors achieve your business goals and to score progress of future visitors. For more information about business outcomes, see [Outcomes](#) in the Genesys Altocloud documentation.
- Create *action maps* (required). Action maps represent the steps that Altocloud will take when a customer satisfied the criteria you specify. The action map configuration identifies the customer activity that triggers the action and the action that results. For more information about action maps, see [Action Maps](#) in the Genesys Altocloud documentation.

For more information about the Altocloud Admin UI, see [Get Started](#) in the Altocloud documentation.

Add the Altocloud Tracking Snippet to your Website

An Altocloud tracking snippet enables your organization to track website visitors. You need to deploy the snippet on your website.

See [Tracking Snippet](#) in the Altocloud documentation.

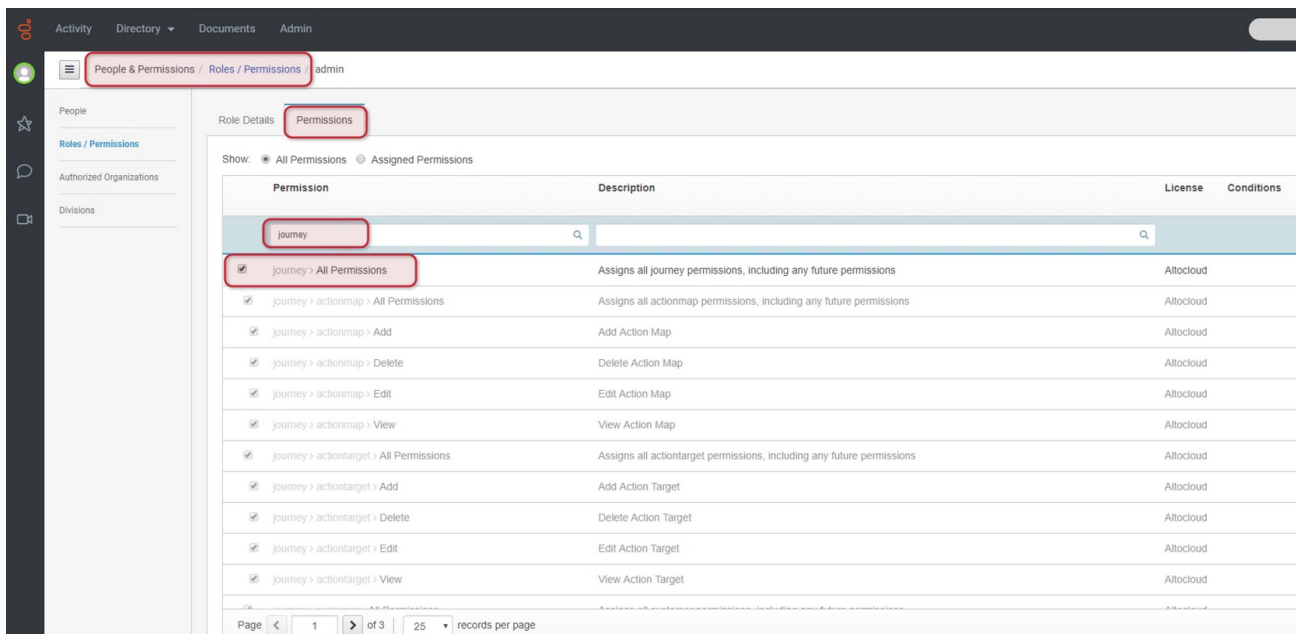
Assign Altocloud Permissions in PureCloud

The Journey permissions in PureCloud are required for the following:

- To send availability updates to Altocloud
- For PureConnect users to load and use the Altocloud journey view in Interaction Connect

To assign the permissions to the admin role::

1. In PureCloud, click **Admin**.
2. Under **People and Permissions**, click **Roles/Permissions**.
3. In the list of roles, click the admin role. If you ran the PUT request in [Enable Altocloud for the PureCloud Organization](#), then you should see Altocloud in the License column.
4. Click the **Permissions** tab.
5. In the search field, type `journey`.
6. Select **journey > All Permissions**.
7. On the Permissions tab, assign all journey permissions to the admin.



Altocloud in Interaction Connect

Altocloud View in Interaction Connect

Interaction Connect is the PureConnect browser-based application where agents handle customer interactions, such as calls, emails, and chats. Chats initiated by Altocloud appear in the Interaction Connect **Current Interaction** view, just like PureConnect chats.

The customer journey map in Interaction Connect appears in an **Altocloud** view that agents can add.

The screenshot displays the Interaction Connect interface. At the top, there's a header bar with 'Interaction Connect' and various status icons. Below this is a tabbed interface with 'My Interactions', 'Widgets', and 'Company Directory'. The 'My Interactions' tab is active, showing a table with columns: Name, Details, Duration, State, and Queue. A single row is visible for 'John Doe' with details like 'Last updated by the Sy...', '00:00:54', 'ACD - Assign...', and 'workgroup1'. Below the table is a toolbar with icons for actions like Pickup, Hold, Mute, Transfer, Voicemail, Disconnect, Join, Listen, Coach, Record, Pause, Secure Paste, and Private. The main area shows the 'Altocloud' view for a customer. It includes fields for Name (Unknown), Status (Online now), and Visits (1). A 'Visit Journey' section shows a timeline with nodes for 'Home Page', 'Auto Insurance', and 'Home Insurance'. Below this are sections for 'Searches performed' (No searches performed), 'Segments assigned' (all), and 'Outcome scores' (No outcome scores available). At the bottom, there's a table with customer details: Location (Saint Augustine, Florida), Device Type (Apple desktop), Operating System (Mac OS X 10.14.3), and Browser Type (Chrome 74.0.3729.131).

The customer journey map might, for example, provide information about the sequence of pages a visitor saw and the actions they took.

To add the **Altocloud** view in Interaction Connect, see [Views and Dialog Boxes](#) in the Interaction Connect help.

For a description of the elements that appear in the customer journey map, see [Customer Journey](#) in the Altocloud documentation.

PureConnect Widgets

Widgets in Interaction Connect are elements that you can add to a website to support activities like chatting with an agent. The widgets are Javascript-based, cloud-hosted, and cloud-configured extensions that implement the Genesys Widgets API.

Interaction Connect supports the configuration of Genesys widgets. These widgets are easy to configure and deploy by means of code snippets you include in your website.

A widget must be embedded on your organization's website, along with one created in [Add the Altocloud Tracking Snippet to your Website](#). When configured, the widget knows which CIC server and ICWS endpoint to use to initiate a chat.

After configuring the widget, click **Copy Script** and then deploy the resulting widget script on your website.

After configuring the widget, click **Copy Script** and then deploy the resulting widget script on your website.

For more information about widgets in Interaction Connect, see [Widgets](#) in the Interaction Connect help.

Change Log

The following changes have been made to the *PureConnect Integration with Altocloud Technical Reference*.

Change Log Date	Changed...
13-February-2019	Initial release
14-May-2019	Minor updates for 2019 R2
12-June-2019	Updated configuration procedures to reflect move to PureCloud in 2019 R2 Patch 3.