

eServices 8.0

# Universal Contact Server Context Services User's GuideWiki Redirect

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Service Basics

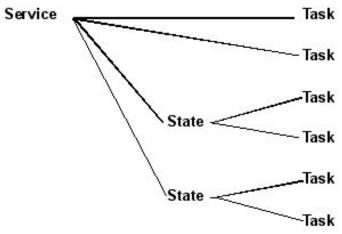
# **Service Basics**



Purpose: Basic information on Services

UCS/CS makes use of a model in which customers are associated with any number of Services. Services are composed of any number of States, and States can in turn be composed of any number of Tasks. This three-level structure provides a flexible vocabulary by which organizations store the history of the services that they provide to customers.

A Service may also be divided directly into tasks:



Services are defined by association to Service Types that you create as Business Attributes in the Configuration Layer. States may be used to represent components of customer service, such as:

- · Customer identification
- Assigning a service agent (automated or live)
- Service identification
- Waiting for a service agent
- Offering another service while waiting for an agent
- · Offering callback
- Waiting for customer input

For more information on this point, see this page in the Context Services Developer's Guide.

Services, States and Tasks exist over some application-defined lifecycle. Upon completion, applications may specify a Disposition. For example, the offering of a new product or service might be recorded as a State of type Offer another service. The Disposition might be set to show whether the customer accepted or declined the offer. Information on past declined or accepted offers could then be used to calculate the likelihood that the customer might be interested in the offer at some point in the future.

**Note:** This Service Model can be used by any component that can access UCS/CS's HTTP interface. It is not limited to use in Conversation Manager.

**Profile Basics** 

# **Profile Basics**



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Purpose: Basic information on profiles

# **Description**

UCS/CS stores contact information in Profiles. Profile data is separated into the following types:

- Core information consists of one or more typed attributes, which are defined by a Schema.
- Extensions consist of one or more typed attributes. Users configure these as needed for their particular organization or customer service application.
- Identification Keys are an attribute or attributes that you specify as the way to identify a customer. These can be attributes of the core information or of associated extensions.

One of the primary features of the Context Services API is the ability to identify customers based on one or more attributes of the customer, known as Identification Keys. Each identification key consists of one or more attributes of the core customer profile, or of any defined extension. An attribute must be specified as an Identification Key to be usable in customer identification.

# **Bulk Import of Profile Data**

You can import large amounts of profile data using a POST method, as described in Bulk Profile Import in the Developer's Guide.

# **Setting up the UCS Database**



Home > Context Services > Context Services User's Guide > Deployment



Purpose: To set up the database or databases that UCS will use.

## **Prerequisites**

RDBMS, either Oracle or Microsoft SQL. See also the eServices 8.0 Deployment Guide. See the Deployment category page for overall prerequisites for deploying UCS.

#### **Procedure**

- 1. Create a database in your RDBMS.
- 2. Locate scripts in \Universal Contact Server\<application-name>\sql\_scripts\<RDBMS-type>.
- 3. Run ucs-<RDBMS-type>.sql for a new installation or choose the proper upgrade script for your RDBMS

For an existing UCS database, run all scripts that cover your existing version, the current version, and all versions in between. For example, to upgrade from 7.6.1 to 8.0.2, you must run

```
1. upgrade_<RDBMS-type>_7.6.1_to_8.0.0.sql
2. upgrade_<RDBMS-type>_8.0.0_to_8.0.1.sql
3. upgrade_<RDBMS-type>_8.0.1_to_8.0.2.sql
```

Genesys supplies upgrade scripts for all releases starting with 7.0.1.

# **Special Information for Oracle RAC**

#### **DAP Configuration**

To connect UCS to an Oracle Real Application Cluster (RAC), configure a DAP for UCS as follows:

- Use the first node's host and port settings on the Server info tab.
- For the host, port, and ONS settings of each additional node, create create options in the settings section, as follows:
  - Name: ONSConfiguration

Value: nodes=node1:node1port,node2:node2port, ... where port is the ONS port, usually 6251

• Name: hostx, where x is a positive integer

Value: host of RAC

• Name: portx, where x is a positive integer matching one of the hostx options

Value: DB port of RAC, usually 1521

Here is an example configuration for three nodes, named rac1, rac2, and rac3. The DB port is 1521 and the ONS port is 6251 for all nodes.

```
<br>[ServerInfo]
<br>host: rac1
<br>ports: default, 1521
<br>[Options > settings]
<br>ONSConfiguration: nodes=rac1:6251,rac2:6251,rac3:6251
```

```
<br>host1: rac2
<br/>br>port1: 1521
<br>host2: rac3
<br>port2: 1521
```

## **UCP Library**

Starting with the 8.1 release, support of Oracle RAC also requires that you deploy the Universal Connection Pool library, which Genesys is not able to deliver with the installation package.

To deploy the UCP library:

- 1. Download the ucp.jar file from the Oracle web site: http://www.oracle.com/technetwork/database/ features/jdbc/index-091264.html
- 2. Copy the jar file to the UCS home folder in ./lib/db/oracle

When connected to an Oracle RAC configuration, the UCS database layer uses this jar file for connection handling.

If UCS is started against an Oracle RAC without ucp.jar, it will fail to start.

# **Next Steps**

Configure a Database Access Point (DAP).

# **Archiving and Pruning the Database**



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Purpose: This page describes maintenance of the UCS database.

#### Overview

To prevent your UCS database from expanding to an unmanageable size, you may wish to perform archiving and pruning.

- · Archiving is the process of removing selected threads from the main database and storing them in the archive
- Pruning (sometimes also called purging) is the process of removing threads from either the main or the archive database.
- Maintenance is a cover term for pruning and archiving.

For both archiving and pruning you have a choice of two processes, as laid out in the following table.

## **Comparison of Maintenance Processes**

Process	Configuration options (section/option)	Speed	Complexity	Availability	Objects accessible
UCS Manager archiving	<pre>cview/enabled = false</pre>	Slower	Simple, can stop midway	All releases of UCS	Interactions only
UCS Manager pruning	cview/enabled = false	Slower	Simple, can stop midway	All releases of UCS	All
Set-based archiving	<pre>cview/enabled = true archiving/use-np = true</pre>	Very fast	Several steps, cannot stop midway	UCS 8.0.2 and later	Interactions only
Prune using options	cview/enabled = true	Fast	Cannot stop midway	UCS 8.1.0 and later	All

# **Using UCS Manager Only**

For all releases of UCS, you can use UCS Manager to configure and run the complete process of maintaining the UCS database, as described in the online Help that is delivered with UCS Manager.

UCS Manager can also:

- 1. correct certain problems that may exist with data integrity, and
- 2. display statistics about the UCS database.

# **Set-Based Archiving**

Beginning with release 8.0.2 of UCS, you can also use set-based archiving. One way to characterize the difference between the new set-based archiving and the existing archiving via UCS Manager only is that the former moves data table by table while the latter moves it interaction by interaction.

Set-based archiving requires expertise in database management. Therefore it should be performed only by a qualified database administrator.

#### **Prerequisites**

#### Disk Space

Set-based archiving requires temporary space in the main database constituting about 90% of the space occupied by the archivable interactions. For example, if one million interactions, including 350,000 attachments, take up 10.2 GB in the main database, the temporary space needed is 9 GB.

#### User rights

UCS must create and drop tables during the archiving process. These rights must be granted to the UCS user in the main DB during the archiving process. Once this process is completed these rights can be revoked for normal operation of UCS. Consult your RDBMS documentation for directions on granting and revoking these rights.

The user will have to execute special queries to transfer data from temporary table to archive DB. These queries are particular to MS SQL Server and Oracle.

For Oracle, the user must be able to create and drop database links using the following queries:

```
create database link arch using 'ucsarch';
drop database link arch;
```

For MS SQL Server, the user must be able to execute the following stored procedure:

```
EXEC sp_addlinkedserver @server = N'suite801', @srvproduct=N'SQL Server'
EXEC sp_dropserver 'suite801', null;
```

• The queries presented here describe the minimum needed to create the database link between the main and archive UCS databases. Depending on the configuration of your database, you may need to pass more parameters, such as usernames, password, schemas, tablespaces, and so on. Consult your RDBMS documentation for guidance.

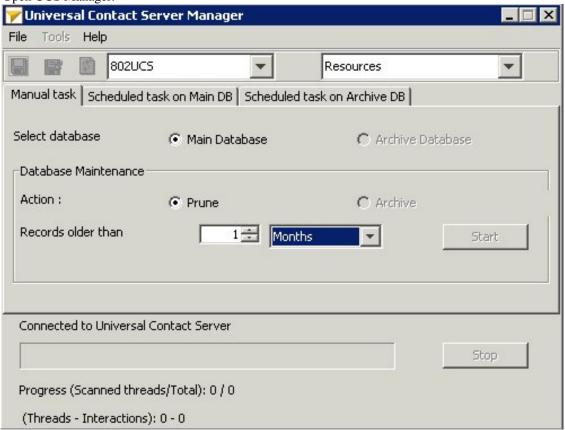
#### Configuration

Open your UCS Application object and:

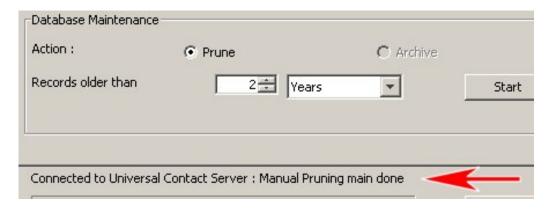
- In the cview section, set the enabled option to true.
- $\bullet \ \ Create \ a \ section \ called \ \texttt{archiving.} \ \ In \ it \ create \ an \ option \ called \ \texttt{use-np} \ \ with \ the \ value \ \texttt{true.}$

#### **Start the Archiving from UCS Manager**

1. Open UCS Manager.



- 2. Select one of the following tabs:
  - Manual task for performing one-time maintenance
  - Scheduled task on Main DB for scheduling periodic maintenance on the main database
  - Scheduled task on Archive DB for scheduling periodic maintenance on the archive database
     If you select either of the scheduled tasks, you must also be able to schedule the execution of the SQL queries described lower down on this page.
- 3. Click Start.
- 4. When UCS Manager displays <task> <database> done, in the area indicated by the red arrow in the screenshot below,
  - For pruning, stop here.
  - For archiving, proceed to the next section below.



#### **Continue The Process**

Continue by issuing the SQL queries described for the two supported RDBMs on these pages:

- Oracle databases
- MicroSoft SQL databases

#### **Failure Recovery**

The steps to recover from a failure depend on whether the failure occurred during the archiving process, or when data was being moved. Both possibilities are described below.

#### **Failure During Archiving**

If a failure occurs during archiving, the archiving process must be restarted from the beginning. To do so,

- 1. Stop UCS Manager and UCS.
- 2. Execute the following queries:

```
drop table docid_temp;
drop table ixnid_temp;
drop table interaction_arch;
drop table emailin_arch;
drop table emailout_arch;
drop table phonecall_arch;
drop table callback_arch;
drop table cobrowseurl_arch;
drop table chat_arch;
drop table attachment_arch;
drop table ixncontent_arch;
drop table ixnContentSentReceived_arch;
drop table document_arch;
```

3. Restart both UCS Manager and UCS, and restart the archiving process.

#### **Failure During Data Movement**

If a failure occurs during data movement, roll back all movement operations. The archiving procedure does not need to be executed again. Just restart the "Transferring Data into UCS DB Archive" procedure, described here for Oracle and here for MS SQL.

#### **Multiple Attachment of a Single Document**

In order to save space, UCS re-uses the same document object in the database if it is attached multiple times to an interaction. This is, for example, the case when using Standard Responses with attachments, either for agent use or for automatic replies. Like archiving using UCS Manager alone, set-based archiving does not remove unused documents from the main database because it would require an SQL operation that could take several hours to execute on large databases.

For the same reason, the archiving mechanism cannot check if a document has already been inserted into the archive database. If a certain document is used multiple times, insertion of the document object in the archive database will fail with a Primary Key Constraint Violation during the execution of the following query:

#### Oracle:

```
insert into document@arch select * from document_arch;
```

#### Microsoft SQL Server:

```
insert into bsgenucsdb.UCSArch.dbo.document select * from document_arch;
```

There are two possible workarounds:

- Skip this operation and avoid copying documents into the archive database.
- Use database-specific commands to merge the data into the archive database. Consult your database documentation for instructions on executing this operation.

#### Limitations

Set-based archiving has the following limitations:

- DB2 is not supported.
- The progress indicators in UCS Manager do not function.
- As with archiving using UCS Manager only, set-based archiving does not remove documents from the main database. Use UCS Manager's Data Integrity Correction tool to remove the orphan documents.
- If you stop the archiving from UCS Manager, processing will stop only when the current operation is finished. Depending on the size of the database, this can take from minutes to hours.
- If you stop the archiving process, you must restart the process from the beginning, first ensuring that no temporary tables are left (see Failure During Archiving). Unlike the existing archiving using UCS Manager only, set-based archiving does not support resuming the process from the point that it stopped.
- If an error occurs at any level during archiving process, you must restart the process from the beginning, first removing any temporary tables.
- You must ensure that enough space is available in the main database before starting the process. If there is insufficient space the process will fail and must be started over.
- Pruning is supported on the main database only, not on the archive database.

# **Using Configuration Options to Schedule Service Pruning**

Starting in release 8.1.0, you can use configuration options to schedule pruning (purging) of service records. It is not possible to use UCS Manager for these operations.

- 1. On the Annexes tab of your UCS application, create one or more sections called scheduled-job-XX, where XX is any convenient identifier.
- 2. Create options and assign values to them, as described in the table below.

If you have multiple scheduled-job-XX sections, be careful to keep the scheduled times (specified by the cron-expression option) separate. Only one purging operation can be executed at a given time: if one operation is not finished when a second one has been scheduled, the second one will not start at all.

#### **Service Pruning Options**

These are the options that may be added to a scheduled-job-XX section. You can create multiple scheduled-job-XX sections.

## **Service Pruning Options**

Option Name	Default Value	Valid Values	Value Changes	Description
enabled	false	true, false	Take effect immediately	Enables (false) or disables (true) the effects of these purging options.
action	purge.service.closed	<ul> <li>purge.service.all</li> <li>purge.service.open</li> <li>purge.service.open.anonymous</li> <li>purge.service.closed</li> <li>purge.service.closed.anonymous</li> </ul>	Take effect immediately	Specifies the type of action to be performed when the pruning process runs:  • purge.service.all@Any started or completed services within the given time range are purged.  • purge.service.open.anonymous@Only open anonymous services are purged from database.  • purge.service.open@Only non-completed services are purged from database.  • purge.service.closed'@Only completed services are purged from database.  • purge.service.closed.anonymous'@Only completed anonymous services are purged from database.
period	5	Any positive integer from 1 to 9999	Take effect immediately	Sets the time frame for pruning. For example, with settings of period=6 and period-type=days, the purging process deletes all services older than 6 days. See also the period-type option.
period-type	months	<ul><li>hours</li><li>days</li><li>months</li><li>years</li></ul>	Take effect immediately	Specifies the units to use with the period option:  • hours Purge services older than n hours.  • days Purge services older than n days.  • months (default) Purge services older than n months.  • years Purge services older than n years.  See the period option.
cron-expression	0 0 20 ? * 6L	Any valid Cron expression, as described at Cron Expression [1]	Take effect immediately	Specifies the schedule for pruning. The default value means that pruning takes place at 8 PM on the last Friday of the month; see the diagram in the following section. For additional documentation about Cron, see the Wikipedia entry. [2]

#### **Cron Example**

Here is an analysis of the default value of the cron-expression option:

```
6L
           => Triggers at 8 PM on the last Friday of every month
       └─ year (optional)
         - day of week (0 - 7) (Sunday=0 or 7)
         - month (1 - 12)
         - day of month (1 - 31)
         - hour (0 - 23)
         - \min (0 - 59)
         - sec (0 - 59)
```

#### References

- [1] http://www.docjar.com/docs/api/org/quartz/CronExpression.html
- [2] http://en.wikipedia.org/wiki/Cron

# **Configuration Options**



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Purpose: Lists the configuration options that your application can read.

# **Description**

The tables in the following sections present the UCS configuration options that Context Services can read from the Configuration Layer:

- cview section Options and values specific to Context Services.
- archiving section [Activates set-based archiving.
- authentication section Tenables and configures authentication control.
- business-attributes section Maps Context Service keys to Business Attribute key-value pairs.
- log-filter section Implements security log filtering.
- log-filter-data section[Also relates to security log filtering.

You can modify all these option values in the Configuration Manager. However, the change may not be effective immediately. For some options you have to restart UCS for changes to take effect (see the tables below).

In Configuration Manager and Genesys Administrator, you can see many options other than those described here. They relate to UCS's functioning in eServices (short description here), and are described in the eServices Reference

Also, this page describes options that are displayed on the Options tab of the UCS Application object in Configuration Manager and Genesys Administrator. Some options that can be added to the Annex Tab in Configuration Manager, or to Advanced View (Annex) in Genesys Administrator, are described in Using Configuration Options to Schedule Service Pruning.

# [cview] Section

This section adjusts the overall configuration of Context Services.

## cview Section

Name	Restart UCS <sup>[1]</sup>	Description
enabled	Yes	<ul> <li>true to enable the Context Services functionality in UCS<sup>[2]</sup>.</li> <li>false (default) to disable the Context Services.</li> </ul>
port-http	Yes	The HTTP port used to deploy UCS/CS (defaults to 8080).
port-https	Yes	The HTTPS port used to deploy UCS/CS (defaults to 8083).
base-url	Yes	The base URL used to deploy the Context Services. Based on this configuration, the services are available at the following URL:  [3]  Where:  • \${ip-address} is the IP address configured below.  • \${port} is the port on which the web services are deployed (see above).  • \${base-url} is the base URL used to deploy the Context Services.  For example, if the ip-address is 192.168.1.1, the port 8080, and the base URL cms, the Set Server Mode operation would be available at the following URL:  [4]
ip-address	Yes	IP address used to deploy the Context Services (localhost by default).
data-validation	No	<ul> <li>true to enable data validation, which enforces additional checks on data provided by the connected clients.</li> <li>false to disable data validation.</li> </ul>
keyPassword	Yes	Password for the certificate.
Deprecated since: 8.1.000.xx		No longer available in 8.1. See the Security_and_Authentication page.
keystorePassword Deprecated since: 8.1.000.xx	Yes	Password for the keystore file.  No longer available in 8.1. See the Security_and_Authentication page.
	Yes	Path to standard JKS file.
keystorePath Deprecated since: 8.1.000.xx	res	No longer available in 8.1. See the Security_and_Authentication page.
keystoreType	Yes	JKS or other JSSE-supported type.
Deprecated since: 8.1.000.xx		No longer available in 8.1. See the Security_and_Authentication page.
start-mode	Yes	Start-mode of the server mode:  • maintenance • production
tenant-id	Yes	Defaults to 101. Specifies the numeric tenant ID associated with Context Services: subsequent customer/contact records created through your application are associated with this tenant.
metadata-cache available since: 8.0.3xx.xx	No	<ul> <li>true to enable the caching of metadata in the memory.</li> <li>false to disable the metadata caching. In that case, each access to the metadata triggers a DB query.</li> <li>The cache contains metadata for contact attributes, identification keys, profiles, services, states and tasks extensions.</li> </ul>

<sup>[1]</sup> This column indicates whether you must restart UCS for changes in the option value to take effect.

- [2] Universal Contact Server
- [3] http://\${ip-address}:\${port}/\${base-url}/\${operation}
- [4] http://192.168.1.1:8080/cms/server/mode

# [archiving] Section

This section activates and deactivates set-based archiving. It is not present on the UCS template; you must create it. It contains just one option:

## archiving Section

Name	Restart UCS <sup>[1]</sup>	Description
use-np	Yes	• true to enable set-based archiving.
		• false (default) to disable set-based archiving.

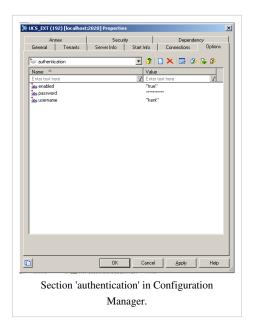
# [authentication] Section

This section configures authentication for clients connecting to UCS. Authentication, available since release 8.0.300.02, applies to UCS/CS only. See also:

- The directly-related Basic Access Authentication page.
- Authentication on the Security and Authentication page.

#### authentication Section

Name	Restart UCS <sup>[1]</sup>	Description
enabled	Yes	<ul><li>false to disable authentication (default).</li><li>true to enable authentication.</li></ul>
mode	Yes	Authentication mode:  • single-user to authenticate using UCS options.  • multi-users to authenticate using Persons from Configuration Server.
password	Yes	Password to check the identity of the specified user. Effective only if mode is set to single-user.
username	Yes	User name allowed to connect to the Context Services API. Effective only if mode is set to single-user.
use-role	Yes	<ul> <li>false to disable the use of roles in authentication (default).</li> <li>true to enable the use of roles in authentication.</li> </ul>



# [business-attributes] Section

This section defines the mapping of the Context Services map with the Business Attributes configured in the Genesys Configuration Server. The Business Attribute values are defined in the Tenant.

## business-attributes Section

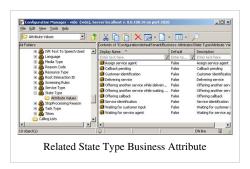
Name	Restart UCS <sup>[1]</sup>	Description
\${resource	No	Associates a Business Attribute key with the name of the Business Attribute configured in the proper
name}.\${field name}		tenant. The option key name follows this syntax:
		\${resource name}.\${field name}
		Possible \${resource name} values are:
		Service
		• State
		• Task
		Possible \${field name} values to map are:
		type (for service type)
		• disposition
		application_type
		resource_type
		media_type
		Such as, for instance: Service.service_type, Task.disposition, State.media_type.
		Notes:
		• if there is no configuration for a given field, the Context Services automatically allows any valid integer value for this field. In this case, your application is responsible for the value's validity.
		A Business Attribute can be mapped to several resource fields. For instance, the Service.media_type
		and Task.media_type string can both point to "MediaType" Business Attributes.
map-names	No	Possible values are:
		• true to return the Names of Business Attribute Values instead of DB IDs in the responses for GET operations.
		false (default) to return the DB IDs of Business Attribute Values in the responses for GET
		operations.

## **Mapping Example**

This first screenshot shows the section in UCS options, with the list of mapped keys, such as, for instance: Service\_service\_type, Task.disposition, State.media\_type.



The following screenshot shows one of the mapped business attributes, the key and the associated values, which your application can retrieve in the result of GET operations by setting to true the map-names UCS options, as stated above.



# [log-filter] Section

This section contains general settings for how or whether user data keys appear in the logs. Its settings can be overridden for specified keys by options in the log-filter-data section.

## log-filter Section

Name	Restart UCS <sup>[1]</sup>	Description
default-filter-type	No	Sets the default for filtering the output of user data keys to the UCS server log. Possible values:  • skip@Does not output key-value pairs.  • hide@Outputs the keys but hides their values.  • copy (default)@Outputs both the keys and their values.  This default filter applies to all user data keys, except that is is overridden by any settings for individual keys in the log-filter-data section.
filter-depth	No	Depth used while filtering nested key-value pairs. The default is 99. Any value greater than this is not checked. Using a high value can result in lower performance in the case of deeply nested key-values.

# [log-filter-data] Section

This section enables you to override the log-filter section's setting for one or more specific data keys. You do this by creating options with the name <keyname> and the value <filtering mode>, where:

- <keyname> is the user data key affected.
- <filtering mode> is skip, hide, or copy, the same as the possible values of default-filter-type in the log-filter section.

# **Configuring a DAP**



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Purpose: To set up the DAP (Database Access Point) that UCS will use.

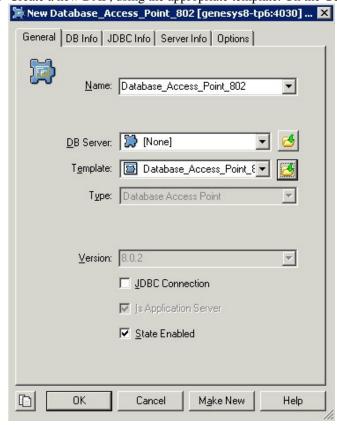
# **Prerequisites**

RDBMS, either Oracle or Microsoft SQL. See also the eServices 8.0 Deployment Guide.

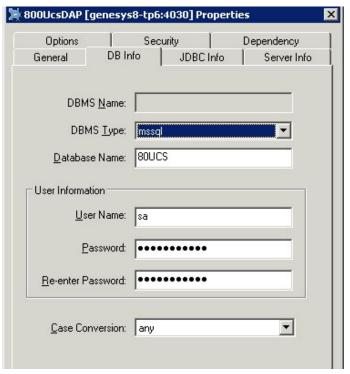
Configuring a DAP

#### **Procedure**

1. Create a new DAP, using the appropriate template. On the General tab:



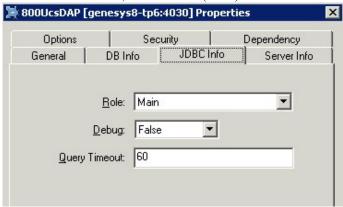
- a. Enter a name for the DAP.
- b. Do not enter anything in the DB Server field.
- c. Select Enable JDBC access.



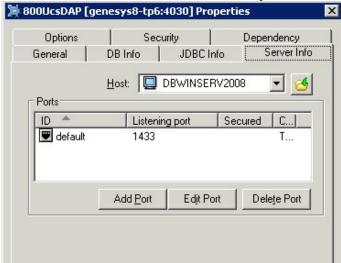
- 2. On the Database Information tab:
  - a. Enter the DBMS type, database name, user name, and password.
  - b. Set Case Conversion to any, and leave the DBMS Name field clear.

Configuring a DAP

3. On the JDBC Info tab, enter the role (Main).



4. On the Server Info tab, enter the host name and port number.



To connect to an Oracle RAC (Real Application Cluster), see this additional information.

# **Next Steps**

Configure a UCS Application object.

# Configuring a UCS Application object



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Purpose: To configure a UCS Application object.

## **Prerequisites**

It is preferable to set up the database and configure a DAP before creating the UCS Application object.

#### **Procedure**

- 1. On the General tab, enter a name.
- 2. On the Server Info tab, enter a host name and port number.
- 3. On the Start Info tab, enter an arbitrary character. The real values will be entered during installation.
- 4. On the Connections tab, add connections to the UCS DAP, Message Server, and Stat Server.

The underscore character ( \_ ) is not supported for host names that UCS connects to. Having this character in a host name can result in unstable behavior, such as inability to connect to the target host. Note that RFC 1123, section 2.1 "Host Names and Numbers" limits host names to letters, digits, and hyphen. If a host that UCS connects to contains underscore in its name, Genesys recommends that you create an alias and change the host name in the Configuration Layer.

- 5. On the Options tab, in the cview section:
  - 1. Set enabled to true.
  - 2. Set port to the port on which the web services will be deployed (the default is 8080).
  - 3. Set tenant-id to the identifier of the tenant with which UCS will be associated.
  - 4. Set other configuration options as needed. All options are described on the Configuration Options page.

## **Next Steps**

- 1. Optionally, configure UCS to use HTTPS.
- 2. Optionally, configure role privileges for UCS.
- 3. Install UCS. Installing UCS is a simple matter of launching the installation entering Configuration Server login information.

Contact Identification 19

# **Contact Identification**



**Purpose:** Provides a high-level description of UCS/CS's method of identifying customers, and contrasts it with the way that UCS (without CS) does so.

If either method produces a unique match for the incoming customer data, there is of course no problem. The differences become relevant when there are multiple matches or when there is no match.

# **Multiple Matches Found**

If UCS tries to identify a customer, and receives more than one match in return:

- In UCS, there are various possibilities depending on the entity that requested the identification. For example, UCS selects the first customer in the returned list if it is responding to E-mail Server. A description of all possible scenarios can be found in the "Contact Identification and Creation" chapter of the eServices 8.0 User's Guide.
- In UCS/CS, you define arbitrary identification keys (such as e-mail address, last\_name + first\_name, and so on). If you attempt to identify by e-mail address, for example, and this maps to more than one customer, the application receives complete profiles for all matched customers. This gives the application the opportunity to disambiguate.

For example, the SCXML application may send the matched profiles to the IVR, which might prompt for the customer's name (with the grammar formed by taking the names from the matched profiles). More generally, the application will prompt for additional information and use other identification keys to further isolate the customer's identity. Once a given identity is assumed, the application will often use additional information (such as the customer's ZIP code) to validate the customer's identity. In this sense, UCS/ allows for the application to distinguish between assumed and validated customer identities.

#### **No Matches Found**

- In UCS, if a customer is not found on lookup, a new contact record is created. Again, this may or may not be correct.
- In UCS/CS, the application again has the opportunity to collect additional information and attempt to identify the customer using some other identification key. In the end, the application or the agent may separately decide to create a new customer/contact profile, but the decision to do this is completely application-specific.

The preceding statements about how UCS (without Context Services) identifies and creates contacts apply only to the default behavior of UCS. The "Contact Identification and Creation" chapter of the eServices 8.0 User's Guide describes ways that you can customize this default behavior. However, what you can customize is limited to 1) the contact attributes that UCS checks and the order it checks them in, and 2) whether UCS creates a new contact in the event of no match, or if it does, a minimum set of attributes that must match. In neither case does it allow the application to expand the attributes that it checks, unlike UCS/CS.

Using HTTPS 20

# **Using HTTPS**



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Purpose: To configure UCS to use secure HTTPS connections.

#### Overview

This page describes using configiration options and the keytool utility to configure UCS to use secure HTTPS

- · Keytool is a key and certificate management utility included in JDK or JRE installations. For instance, when you install Java Environment and Libraries for eServices and UCS, keytool is placed in the \jre\bin directory.
- In release 8.1.0 and later, the options are located in new sections that you create on the Annex tab in Configuration Manager or the Advanced View (Annex) in Genesys Administrator. Prior to release 8.1.0, you add the options to the cview section.

#### **Procedure**

This procedure makes use of keytool, which is a key and certificate management utility included in JDK or JRE installations. For instance, when you install Java Environment and Libraries for eServices and UCS, keytool is placed in the \jre\bin directory.

1. Generate a key-pair for the certificate. The following is an example command line:

```
keytool -genkey -v -alias hostname.example.com
-dname "CN=hostname.example.com,OU=IT,O=ourcompany,C=FR" -keypass theKeyPassword
-keystore certificate.jks -storepass the Keystore Password -keyalg "RSA" -sigalg "SHAlwith RSA"
-keysize 2048 -validity 3650
```

- 2. Set configuration options in your UCS Application object.
  - In release 810 and later:
  - 1. Go to the Advanced View (Annex) in Genesys Administrator or the Annex tab in Configuration Manager.
  - 2. Create sections called http.tls.keystore and http.tls.key.
  - 3. Add options to the new sections, as described in the HTTPS section of the Security and Authentication page.
  - Prior to release 810, add the following options to the cview section. See the Configuration Options page for full descriptions.
    - keyPassword, keystorePassword, keystorePath, keystoreType—Set values according to the values used in the command line.
    - port-https—Choose a value that is appropriate for your environment. You can also configure the port-http option, but it is not required.
- 3. Export the certificate from UCS. Following is an example command line:

```
keytool -export -v -alias hostname.example.com -file certificate.cer
-keystore certificate.jks -storepass theKeystorePassword
```

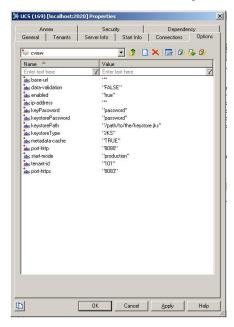
4. Import the certificate on all clients of UCS. Following is an example command line:

```
keytool -import -alias hostname.example.com -file certificate.cer
-keystore .keystore -storepass anotherPassword
```

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# **Example**

This screenshot shows UCS configured to listen on both HTTP and HTTPS ports.



# **Conversation Manager**



Home > Context Services > Context Services User's Guide > UCS and Conversation Manager



Purpose: Provides a general description of Conversation Manager.

Genesys Conversation Manager takes Genesys' core capability of routing and extends it, generalizes it, and integrates it more tightly with other Genesys products. Rather than the call (T-Server) or the interaction (eServices/Multimedia), Conversation Manager takes the service as the basic entity. It "orchestrates" the service process across channels and over time, using dynamic data and business rules to make decisions about operations.

#### For example,

A bank customer calls a toll-free number inquiring about mortgage preapproval. An IVR prompts him to enter his account number, then transfers him to an agent, who fills in an application form for him and asks him to fax some supporting documents. After he faxes the documents, he receives an SMS message thanking him and informing him that he will receive a response within 48 hours. The next day he receives an e-mail congratulating him on the approval of his application.

This example involves voice, IVR, fax, SMS, and e-mail channels. Conversation Manager is able to treat the entire sequence as a single service.

Conversation Manager 22

#### **Orchestration Server**

Orchestration Server has a function in Conversation Manager similar to the function of Universal Routing Server (URS) in Genesys voice and multimedia solutions. One of the main differences is that it operates based on business processes developed in State Chart XML (SCXML) rather than routing strategies written in IRL (Intelligent Routing Language, a Genesys proprietary language).

## **SCXML** applications

SCXML applications can be written directly using any XML or plain text editor, or with Genesys Composer, an Eclipse-based development environment. They are published on an application server such as JBoss or another Java-based application server, and are executed on Orchestration Server.

## **Genesys Composer**

Composer also provides a set of function blocks that allow access to Context Services. These out-of-the box function blocks on the workflow diagram palette allow the developer to create applications that perform various actions, such as:

- Identify customers and update their profiles.
- Extend customer profiles with user-defined information.
- Query a customer's profile.
- Create, start, complete, and query customer services.
- Query customers' active services.
- Enter, complete, and query service states.

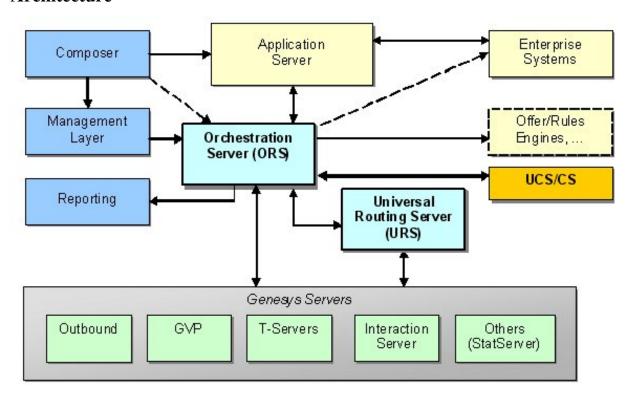
## **Service**

Conversation Manager adds to Genesys the concept of service, which may be defined as follows:

- It represents a business process, which in turn may be seen as a communication or series of communications between a customer and an enterprise, and possibly also between various parts of the enterprise.
- It can span multiple interactions.
- It may include interactions in various media.
- It has a temporal beginning and end.
- It may be subdivided into states, which in turn may be subdivided into tasks (see also the diagram in Service Basics).
- This term state does not have the same meaning as "SCXML state."

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## Architecture



# Messaging, Modes, and Migration



Purpose: More on the basic operation of UCS/CS

# Messaging

Clients connect to UCS/CS and send requests, to which UCS responds. Clients communicate with UCS via RESTful web services, using HTTP request methods that are based on the GET, POST, PUT, and DELETE methods.

Clients of UCS/CS may include Orchestration Server, Genesys Voice Portal (GVP), agent desktops, or any third party application that makes use of real-time customer service information.

#### **Modes**

UCS/CS has two modes of operation. Each message can be sent in only one mode.

- Production—The normal operating mode. UCS accepts incoming requests for querying/updating customer profiles and service-related data.
- Maintenance—For configuring the database and other operations; normally to be used only at times of low traffic.
  Use this mode to create extensions to the customer profile model, or to define identification keys. While in
  maintenance mode, the system does not process incoming requests for querying or updating customer profiles or
  service history.

# **Migration and Transition**

For migration from versions 7.0 through 8.0.0 of UCS, see the Genesys Migration Guide.

For versions previous to 7.0, there is no complete migration, but you can convert most of the UCS (then called Contact Server) database. The procedure is described in the "Transitioning to eServices from ICS 6.x" chapter in the eServices 8.0 User's Guide.

# **Security and Authentication**



Home > Context Services > Context Services User's Guide > Deployment



Purpose: Gathers together topics relating to security, encryption, authentication, and the like.

# **Database Encryption**

For database encryption, Genesys recommends:

- Oracle 110Tablespace encryption; see http://www.oracle-base.com/articles/11g/ TablespaceEncryption\_11gR1.php.
- MSSQL Server 2008 [TDE (transparent data encryption); see http://msdn.microsoft.com/en-us/library/ cc278098(SQL.100).aspx.

Do not use column-level encryption.

# **Security Log Filtering**

You can use configuration options in the log-filter and log-filter-data sections to control how or whether user data keys appear in the logs.

## **HTTPS**

#### 8.1.0 and Later

Starting in release 8.1.0, you can configure UCS to use secure HTTPS connections by adding sections to the Annex Tab in Configuration Manager or the Advanced View (Annex) in Genesys Administrator.

These sections, which specify certificate options for TLS support with the HTTP or ESP protocols, have names of the following forms:

- col>.tls.keystore
- col>.tls.key

Here can be either esp or http, making a total of four possible sections.

## col>.tls.keystore section

Option	Default	Valid	Value	Description
Name	Value	Values	Changes	
type	JKS	JKS,	Take effect	The type of keystore that the path option points to. Not required.
		PKCS12	upon restart	
path	./certificate.jks	Any valid	Take effect	The path to the keystore holding the certificate key-pair information for HTTPS web
		pathname	upon restart	services. Required if an HTTPS port or ESP TLS port is set. Examples:
				c:\mypath\to\mykeystore (Windows),/opt/keystore/mykeystoreJava
				(Unix), ./folder/keystore (Unix, relative path).
password		Any string	Take effect	The password that secures the keystore that the path option points to. Required if the
			upon restart	path option is present. Note that the default value is an empty string. Not to be confused
				with the option of the same name in the <pre> <pre>protocol&gt;.tls.key</pre> section.</pre>

## 

Option Name	Default Value	Valid Values	Value Changes	Description
password		Any	Take effect	The password used to secure the private key from the keystore that the
		string	upon restart	<pre><pre><pre><pre><pre><pre><pre><pre></pre></pre></pre></pre></pre></pre></pre></pre>
				be confused with the option of the same name in the <pre> <pre>protocol&gt;.tls.keystore section.</pre></pre>

#### **Before 8.1.0**

Prior to release 8.1.0, use of HTTPS is configured as described in Using HTTPS.

#### Authentication

When clients connect to UCS, there are two possible modes of authentication, specified by configuration options in the authentication section.

- Single-user@Clients connect using the user name and password specified by the UCS options username and password. This means all UCS clients must use the same credentials. To enable single-user authentication, give the mode option a value of single-user.
- Multi-User Clients are configured as Persons in the Configuration Layer, and connect to UCS using the user name and password specified by their Person object. This means that each client can have its own credentials. To enable multi-user authentication, give the mode option a value of multi-users.

These and all other UCS/CS options are described on the Configuration Options page.

## **Role-Based Access Control**

Role-based access control is available in UCS/CS starting in release 8.1.0. See

- UCS Role Privileges in this User's Guide.
- Role-based Access Control in CS in the Context Services Developer's Guide.

# **Set-based Archiving with MSSQL**



Purpose: This page presents the SQL queries used for set-based maintenance of the UCS database on an MS SQL RDBMS.

# **Prerequisites**

See Archiving and Pruning the Database for prerequisites.

In particular, before using these queries you must first run archiving from UCS Manager.

# **Creating the Database Link**

- 1. Be sure that the DNS name resolves properly to the archive database server. If not, you can add it to the host file; on Windows, for example, this is located at C:\WINDOWS\system32\drivers\etc\hosts.
- 2. To create the DB link execute the following command. Note that the command will return no error, even if a parameter is wrong or the destination host does not resolve correctly.

```
EXEC sp_addlinkedserver @server = N'bsgenucsdbarch', @srvproduct=N'SQL Server'
```

- ① The queries presented here describe the minimum needed to create the database link between the main and archive UCS databases. Depending on the configuration of your database, you may need to pass more parameters, such as usernames, password, schemas, tablespaces, and so on. Consult your RDBMS documentation for guidance.
- 3. To test if creation was successful, execute the following command:

```
select count(*) from bsgenucsdbarch.UCSARCH.dbo.interaction;
```

In this example,

- bsgenucsdbarch is the destination host.
- UCSARCH is the database.
- dbo is the schema.

Edit these names to match your configuration. Do the same in the queries provided in Moving the Data to the Archive Database below.

4. To drop the link, execute the following command:

```
EXEC sp_dropserver 'bsgenucsdbarch', null;
```

The link can be kept permanently and will not affect UCS operations. But when the link is no longer used, you may wish to drop it for security concerns.

# Moving the Data to the Archive Database

1. Use the following commands:

```
insert into bsgenucsdb.UCSArch.dbo.interaction select * from interaction_arch;
insert into bsgenucsdb.UCSArch.dbo.emailin select * from emailin_arch;
insert into bsgenucsdb.UCSArch.dbo.emailout select * from emailout_arch;
insert into bsgenucsdb.UCSArch.dbo.phonecall select * from phonecall_arch;
insert into bsgenucsdb.UCSArch.dbo.callback select * from callback_arch;
insert into bsgenucsdb.UCSArch.dbo.chat select * from chat_arch;
insert into bsgenucsdb.UCSArch.dbo.ixncontent select * from ixncontent_arch;
```

```
insert into bsgenucsdb.UCSArch.dbo.ixnContentSentReceived select * from ixnContentSentReceived_arch;
insert into bsgenucsdb.UCSArch.dbo.document select * from document_arch;
insert into bsgenucsdb.UCSArch.dbo.cobrowseurl select * from cobrowseurl_arch;
insert into bsgenucsdb.UCSArch.dbo.attachment select * from attachment_arch;
```

2. If the move is successful, the temporary tables can be dropped:

```
drop table interaction_arch;
drop table emailin_arch;
drop table emailout_arch;
drop table phonecall_arch;
drop table callback_arch;
drop table cobrowseurl_arch;
drop table chat_arch;
drop table attachment_arch;
drop table ixncontent_arch;
drop table ixnContentSentReceived_arch;
drop table document_arch;
```

#### End

Archiving is now complete. Return to Archiving and Pruning the Database for descriptions of limitations and failure recovery methods.

# **Set-based Archiving with Oracle**



Purpose: This page presents the SQL queries used for set-based maintenance of the UCS database on an Oracle RDBMS.

# **Prerequisites**

See Archiving and Pruning the Database for prerequisites.

In particular, before using these queries you must first run archiving from UCS Manager.

# **Creating the Database Link**

1. The tnsname.ora file must refer to the destination database host in order to enable database link creation. The file must do this even if the destination database is on the same server as the main database. Below is an example tnsname file:

```
# tnsnames.ora Network Configuration File: D:\app\Administrator\product\11.1.0\db_1\network\admin\tnsnames.ora
# Generated by Oracle configuration tools.

UCS =

(DESCRIPTION =

(ADDRESS = (PROTOCOL = TCP)(HOST = bsgenuscdb.emea.lucent.com)(PORT = 1521))

(CONNECT_DATA =

(SERVER = DEDICATED)

(SERVICE_NAME = UCS)
```

```
(DESCRIPTION =
    (ADDRESS = (PROTOCOL = TCP) (HOST = bsgenuscdbarch.emea.lucent.com) (PORT = 1521))
    (CONNECT_DATA =
        (SERVER = DEDICATED)
        (SERVICE_NAME = UCSArch)
)
)
```

In this example, the UCS entry is for the main database and UCSARCH is for the archive database. Note the following: (1) These names must match the names of the databases used. (2) Because is no need for a link from archive to main, you do not have to modify the tnsnames.ora on the archive database machine.

- 2. Ensure that the destination host is reachable from the main machine by pinging the destination host from the main machine.
- 3. Once the tnsname file is properly configured, the execution of the following SQL command will create the DB Link. Note that you will receive no error message even if the tnsnames.ora file or the parameters of ucsarch are incorrect.

```
create database link arch using 'ucsarch';
```

Replace ucsarch with the name that you configured in the thisnames.ora file. ① The queries presented here describe the minimum needed to create the database link between the main and archive UCS databases. Depending on the configuration of your database, you may need to pass more parameters, such as usernames, password, schemas, tablespaces, and so on. Consult your RDBMS documentation for guidance.

4. To test the link, execute the following command, which lists the structure of the interaction table in the archive database:

```
desc interaction@arch;
```

5. To drop the link, execute the following command:

```
drop database link arch;
```

Database links persist through restarts.

# Moving the Data to the Archive Database

1. Use the following commands:

```
create database link arch using 'ucsarch';
insert into interaction@arch select * from interaction_arch;
insert into emailin@arch select * from emailin_arch;
insert into emailout@arch select * from emailout_arch;
insert into phonecall@arch select * from phonecall_arch;
insert into callback@arch select * from callback_arch;
insert into chat@arch select * from chat_arch;
insert into ixncontent@arch select * from ixncontent_arch;
insert into ixnContentSentReceived@arch select * from ixnContentSentReceived_arch;
insert into document@arch select * from document_arch;
```

```
insert into cobrowseurl@arch select * from cobrowseurl_arch;
insert into attachment@arch select * from attachment_arch;
drop database link arch;
```

2. If the move is successful, the temporary tables can be dropped:

```
drop table interaction_arch;
drop table emailin_arch;
drop table emailout_arch;
drop table phonecall_arch;
drop table callback_arch;
drop table cobrowseurl_arch;
drop table chat_arch;
drop table attachment_arch;
drop table ixncontent_arch;
drop table ixnContentSentReceived_arch;
drop table document_arch;
```

#### End

Archiving is now complete. Return to Archiving and Pruning the Database for descriptions of limitations and failure recovery methods.

# **UCS Role Privileges**



Home > Context Services > Context Services User's Guide > Deployment



Purpose: Describes the role privileges that are specific to UCS.

# **Description**

Roles determine what actions a specified user may perform on a specified object. In UCS/CS, the user is most commonly an application; for further explanation, see Role-based Access Control in CS in the Context Services Developer's Guide. Privileges are assigned as configuration options in the Role Privileges tab of the Role object in Genesys Administrator.

To enable the use of roles, the use-role option must have the value true.

Framework 8.0 Genesys Administrator Help and the Genesys Security Guide provide general information on how to use Genesys Administrator and Management Framework to configure access permissions.

UCS Role Privileges 30

# **Privilege Groups**

The following tables place privileges in related groups, as they appear in Genesys Administrator.

# **Customer related**

Privilege
Create Customer Profile
Create Customer Profile Extension
Delete Customer Profile Extension
Read Customer Profile
Read Customer Profile Extension
Update Customer Profile
Update Customer Profile Extension

# **Service related**

Privilege
Create Service Extension
Delete Service Extension
Read Service
Read Service Extension
Start Service
Stop Service
Update Service Extension

## **State related**

Privilege
Create State Extension
Delete State Extension
Read State
Read State Extension
Start State
Stop State
Update State Extension

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# Task related

Privilege
Create State Extension
Delete State Extension
Read State
Read State Extension
Start State
Stop State
Update State Extension
Create Task Extension
Delete Task Extension
Read Task
Read Task Extension
Start Task
Stop Task
Update Task Extension

# Schema management related

Privilege
Create Id Keys
Create Profile Extension Schema
Create Service Extension Schema
Create States Extension Schema
Create Tasks Extension Schema
Read Business Attributes
Read Genesys Administrator Roles
Read Id Keys
Read Profile Extension Schema
Read Service Extension Schema
Read States Extension Schema
Read Tasks Extension Schema

UCS Role Privileges 32

# System management related

# Privilege

Change server mode

Get content from interaction

Read server information

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Profile Basics Source: http://developerzone.genesyslab.com/wiki/index.php?oldid=4065 Contributors: Dsolnit, WikiSysop

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