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Framework Deployment Guide

Deploying the Rest of Your Framework

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Deploying the Rest of Your Framework

Now that you deployed the Configuration Layer and, if required, the Management Layer, you can deploy the rest of the Framework components and the contact center environment.

Recommended Order

Manual deployment of the other Framework components and contact center environment objects involves:

- Configuring the components using Genesys Administrator. Refer to *Genesys Administrator 8.1 Help* for more information.
- Manually installing the configured components.

Before you proceed, make sure that the **Configuration Layer** and **Management Layer** components are installed, configured, and running. To help you prepare accurate configuration information and become familiar with the configuration process, review **Deployment Planning** for help with object-configuration information.

Follow this order for the manual deployment of the other Framework components and contact center environment objects:

1. Media Layer:

- T-Server
- HA Proxy for a specific type of T-Server (if applicable)

Important

Deployment instructions for T-Server and HA Proxy (if applicable) are located in the latest version of the Framework T-Server Deployment Guide for your specific T-Server.

2. Telephony Objects:

- Switching Offices
- Switches
- Agent Logins
- DNS

Important

Configuration instructions for telephony objects are located in the latest version of the Framework T-Server Deployment Guide for your specific T-Server.

3. Contact Center Objects:

- Access Groups
- Skills
- Persons
- Agent Groups
- Places
- Place Groups

4. Services Layer:

- Stat Server

Genesys recommends registering only those entities that you plan to use in the current configuration. The more data in the Configuration Database, the longer it takes for your system to start up, and the longer it takes to process configuration data. Remember that adding configuration objects to the Genesys Configuration Database does not cause any interruption in the contact center operation.

Depending on how much work it is to configure all applications and objects, consider registering more User objects first, with a set of privileges that lets them perform configuration tasks.

Warning

When configuring redundant applications, do not select the redundancy type Not Specified unless using a switchover mechanism other than that provided by the Management Layer. It is acceptable, however, to leave the redundancy type Not Specified for non-redundant applications (that is, applications that do not have backup servers associated with them).

Media Layer

Component (T-Server and HA Proxy, if applicable) configuration and installation for the Media Layer is covered in the latest version of the Framework T-Server Deployment Guide for your specific T-Server. Also covered in that Guide is information about deploying components for redundant and multi-site configurations.

Telephony Objects

The configuration of Configuration Database objects for the telephony equipment used in the contact center is described in the latest version of the Framework T-Server Deployment Guide for your specific T-Server.

Contact Center Objects

Configure Configuration Database objects for the contact center personnel and related entities.

Access Groups

Before deciding what kind of Access Groups you must configure, look at the default Access Groups the Configuration Layer supports and the default access control settings in general.

The default security system may cover all of your needs. If a more complex access control system makes sense for your contact center, Genesys recommends managing it through Access Groups and folders rather than at the level of individuals and objects.

To define an Access Group and its permissions:

1. Identify groups of people that are handling specific activities in the customer interaction network.
2. Create the required Access Group objects.
3. Set Access Group privileges with respect to the object types, using the folders' **Permissions** and **Roles** tabs.

In addition, to simplify the security settings, make sure that permissions are set and changed recursively using the permission propagation mechanism.

Skills

Define agent skills that might be considered as criteria for interaction processing. Skills are configured as independent configuration objects; any Agent can be associated with more than one configured Skill. Therefore, it may be more practical to register Skills before the Agents are configured.

Persons

Persons are more commonly referred to as *Users*, of which there are two major categories: Agents and Non-agents. The latter category includes all Users other than agents that need access to the CTI applications; for example, Center Administrators, Data Network and Telephony Network personnel, designers of interaction-processing algorithms, and Supervisors.

The characteristics of your business environment and your current priorities completely determine the order of registering Persons. Most often, you will want to first configure a few registered Non-agents with a high level of access to help you set up the Configuration Database.

Each user is assigned a unique Username and Password to log in to Genesys software. A valid Username can consist of any characters except \ (backslash) or ? (question mark). For example, a common Username is the User's corporate email address, such as <first name>.<last name>@<company name>.com. Refer to the "User Passwords" section of the *Genesys Security Deployment Guide* for detailed information about user passwords.

Assigning Agent Logins and Skills Registering Agents

Important

You create Agent Logins when you are configuring the **Switch** object. Refer to the latest version of the Framework T-Server Deployment Guide for your specific T-Server for instructions.

If a few agents have a certain skill of the same level, consider using a wizard that adds the skill to multiple User objects after you create them. To launch the wizard, select two or more User objects that have the **Is Agent** check box selected, right-click, and select **Manage Skills**. Refer to *Genesys Administrator 8.1 Help* for more information.

Remember that the Configuration Layer requires that you assign a unique user name to each User, including agents. Consider using employee IDs configured in User objects as default user names and passwords.

New Users by default are not automatically assigned to any access group, by default. They must be assigned to one or more Access Groups explicitly. If you want new users to be added automatically to predefined Access Groups, you must manually disable this feature using the configuration option **no-default-access**. Refer to the section "No Default Access for New Users" in the *Genesys Security Deployment Guide* for more information about this feature, and how to use or disable it.

Some GUI applications also use Ranks to determine what functionality is made available to the User currently logged in. Unless Agents are required to use rank-dependent applications in their work, you do not have to assign any specific Ranks to them.

Ranks and access privileges are more important when registering non-agents. When registering non-agents, consider the role they have in the customer interaction business. Do these Users need to monitor agents' performance? Will they need to configure the telephony resources? Are they going to design routing strategies? Having answers to these questions makes it easier to correctly set up the access privileges with respect to configuration objects, and Ranks with respect to different applications objects.

Remember that Ranks with respect to applications are not the same as access privileges with respect to the configuration objects. You must explicitly define Ranks. Access privileges are assigned by default, according to whether the User is an agent or not.

Genesys does not recommend changing the default access-control setting unless absolutely necessary. Remember, the more complex the security system implemented, the more difficult it becomes to administer the database, and the more it affects the performance of the Configuration Layer software.

Agent Groups

Agent Groups are an indispensable element of almost every contact center. Remember that you can assign an agent to more than one group at a time. If you create agent groups based on Skills, use the **Find** command or the **Dependency** tab of a Skill to quickly identify all the agents that have the Skill in question.

Places

If you use Genesys CTI applications to distribute calls to individual agents or agent groups that are not limited by the switch ACD configuration, set up Places and assign individual DNs to them. Because a typical Place consists of more than one DN, prepare the actual layout of the numbering plan to correctly configure the Places, and assign DNs to them.

Place Groups

Define Place Groups and assign individual Places to them only if they will be used for distributing calls to groups of Places and, therefore, you will need to collect availability information and real-time statistics for such groups.

Services Layer

Genesys recommends that you configure and install components of the Services Layer when you deploy the solution they will serve.

Stat Server

The configuration and installation procedures for Stat Server are described in the documentation for Stat Server.