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Business Edition Premise Provider's Guide

Business Edition Premise 8.1.101

2/15/2022

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Business Edition Premise Provider's Guide

Business Edition Premise, originally known as Genesys One, is an all-in-one pre-installed packaging of Genesys technology onto a set of virtual machines typically run on a single hypervisor server. It includes a SIP Inbound solution, an optional Email solution, and real-time and historical reporting for up to 300 contact center agents.

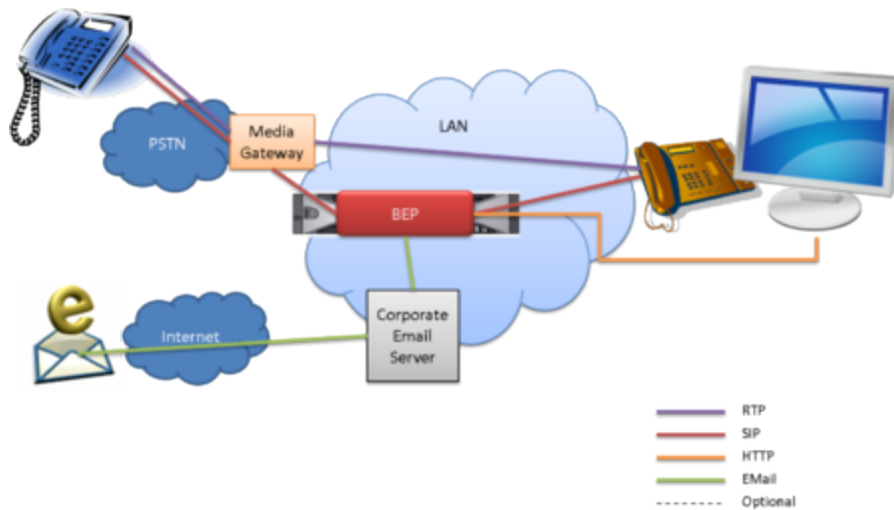
Business Edition Premise installation and initial configuration requires some knowledge of Genesys software. The [Business Edition Premise Guide](#) documents the procedures needed to configure and maintain an existing Business Edition Premise environment.

The "If you are new to Genesys software..." section below clarifies the expected roles of providers and customers.

If you are new to Genesys software...

Business Edition Premise enables you to use the Genesys Administrator Extension interface to set options (parameters) that tailor routing operations. Some of these options, such as declaring an emergency or changing open hours, are easily set even if you have no prior experience configuring Genesys software. Other options, such as auto-attendant (IVR) menus and business targets, are tied to more complex features that must be synchronized with settings in other Genesys applications. We suggest that customers rely on their Business Edition Premise provider to set up these features for them. The provider can then show the customer what options they have customized, such as business reporting categories (Service, Segment, and Department, for example) and announcements. The [Business Edition Premise Guide](#) specifies the tasks that customers can complete without assistance from their provider.

Architecture



Business Edition Premise overview

The Business Edition Premise platform consists of a set of five virtual machines (VMs), installed on a single Dell R720 or Dell R420 server running VMware ESXi 5.1.

After installation and initial configuration, the Business Edition Premise server is a basic Genesys 8 suite, which customers can extend with additional Genesys applications and functionality.

Virtual Machines

The five VMs play specific roles:

- **Core** VM includes core Genesys software components such as Framework, Routing, and SIP Server, as well as the PostgreSQL configuration database
- **DB** VM includes MS SQL Server, Genesys DB Servers, Genesys InfoMart, and RAA
- **GVP** VM includes Voice Platform components such as Media Control Platform and Resource Manager
- **UI** VM includes user interfaces such as Genesys Administrator and Genesys Administrator Extension, IWS, EZPulse, and GI2
- **Aux** VM includes some Genesys Framework components (LCA/GDA), 3rd party components (Apache Tomcat), and room for additional packages such as eServices (required for email functionality)

User interfaces

The table lists the key components used to control settings and reports. The component name links

to its documentation home page.

Component	Role
Genesys Administrator	User and extension configuration
Genesys Administrator Extension	Routing configuration
Interaction Workspace	UI for agents and supervisors
Universal Contact Server Manager	Email contact management
Composer	Email deployment (and potential customization of voice and email routing)
Knowledge Manager	Email configuration
Genesys Interactive Insights	Historical reporting
Pulse (also known as EZPulse)	Real-time reporting

Components

The table below lists the pre-installed components (or included IP Packages) that contribute to the Business Edition Premise solution. To view the supported version numbers (available after the virtual machines are deployed and tuned up), open a browser to <http://Core VM name or IP address>.

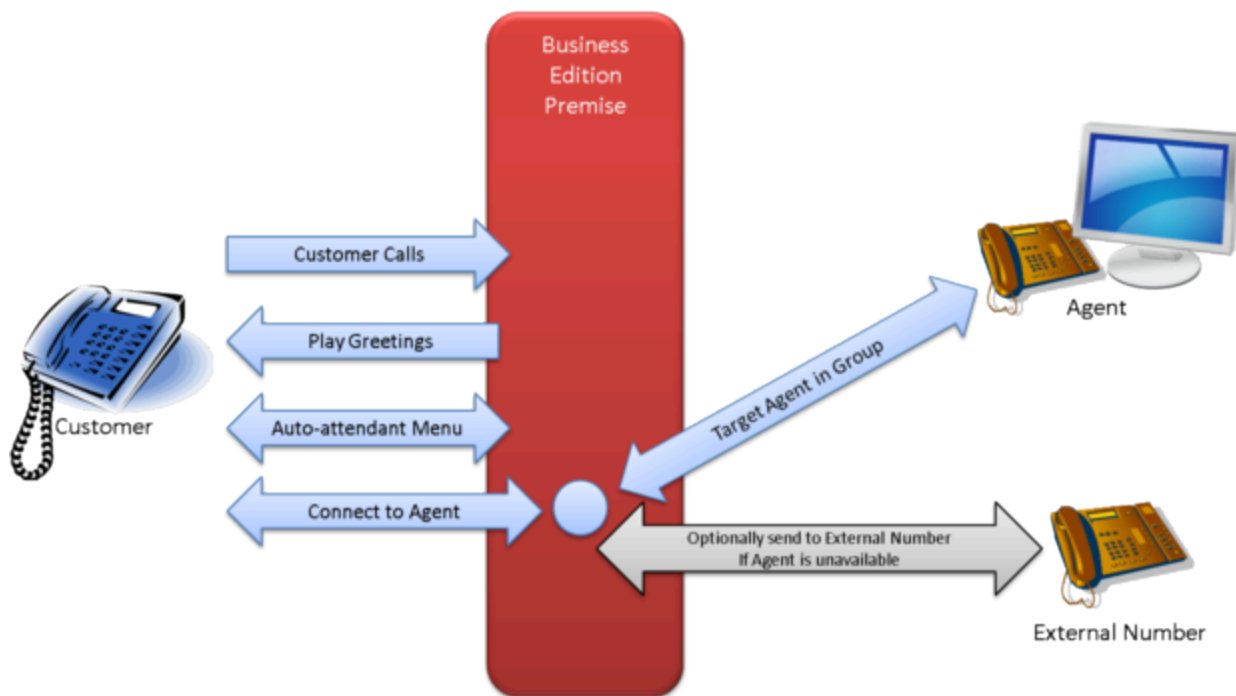
Component Name	Release Note
Composer	Composer 8.1.x Release Note
Configuration Conversion Wizard	Framework 8.1.x Wizard Advisory
Configuration Import Wizard	Framework 8.1.x Wizard Advisory
Configuration Manager	Configuration Manager 8.1.x Release Note
Configuration Server ST	Configuration Server 8.1.x Release Note
DB Server	DB Server 8.1.x Release Note
Genesys Pulse (formerly EZPulse)	Genesys Pulse 8.1.x Release Note
Genesys Pulse Collector (formerly EZPulse Collector)	Genesys Pulse Collector 8.1.x Release Note
eServices MCR Classification Server	Classification Server 8.1.x Release Note
eServices MCR E-Mail Server Java	E-mail Server 8.1.x Release Note
eServices MCR Interaction Server	Interaction Server 8.1.x Release Note
eServices MCR Java Environment and Libraries for eServices and UCS	Java Environment and Libraries for eServices and UCS 8.1.x Release Note
eServices MCR Knowledge Manager	Knowledge Manager 8.1.x Release Note
eServices MCR Universal Contact Server	Universal Contact Server 8.1.x Release Note
eServices MCR Universal Contact Server Manager	Universal Contact Server Manager 8.1.x Release Note
eServices Plugin for GAX	Restricted release; the release documentation is available from the installation package or through ftp.
Flex LM (License Manager)	-
Genesys Administrator	Genesys Administrator 8.1.x Release Note
Genesys Administrator Extension	Genesys Administrator Extension 8.1.x Release Note
Genesys Info Mart	Genesys Info Mart 8.1.x Release Note
Genesys Info Mart Administration Console	Genesys Info Mart Administration Console 8.1.x Release Note
Genesys Interactive Insights	Genesys Interactive Insights 8.1.x Release Note
Genesys Voice Platform Media Control Platform (MCP)	Voice Platform Media Control Platform 8.1.x
Genesys Voice Platform Resource Manager (RM)	Voice Platform Resource Manager 8.1.x
Interaction Concentrator	Interaction Concentrator 8.1.x Release Note

Interaction Workspace	Interaction Workspace 8.1.x
Interaction Workspace SIP Endpoint	Interaction Workspace 8.1.x
Local Control Agent	Local Control Agent 8.1.x
Message Server	Message Server 8.1.x Release Note
Orchestration Server (ORS)	Orchestration Server 8.1.x Release Note
SIP Server	SIP Server 8.1.x
SNMP Master Agent	SNMP Master Agent 8.1.x Release Note
Solution Control Server	Solution Control Server 8.1.x Release Note
Stat Server	Stat Server 8.1.x Release Note
Universal Routing Server	Universal Routing Server 8.1.x

Business Edition Premise and its components use these third-party components:

- Apache Tomcat
- Apache Cassandra
- Eclipse
- Java SE
- MS SQL Server 2008
- MS SQL Server JDBC Driver
- Postgre SQL
- VMware vSphere

Voice routing overview



Inbound routing

The Business Edition Premise voice routing application provides essential inbound call center functions using built-in strategies:

- Entry handling based on contact center status
- Auto-attendant (Interactive Voice Response) menus
- Call distribution based on agent availability and call priority

Entry handling

The application receives the incoming call, retrieves the dialed number (DNIS), and applies status conditions to the call. Is the contact center closed, and if so, why?

- Is it a holiday? If so, the caller hears the Special Day announcement.
- Did the call come in outside of normal operating hours? If so, the caller hears the Closed announcement.
- Is an emergency underway? If so, the caller hears the Emergency announcement.

If the contact center is open, the caller hears an announcement or the auto-attendant menu (if one

exists), or the call passes directly to an agent.

Auto-attendant menus

If you have given the caller a menu of options (“Press 1 for Sales,” and so on), the call passes to the Auto-attendant menu (DTMF) workflow, which specifies the action to be taken depending on the caller’s menu choice. The Auto-attendant flow can cycle up to three times, to accommodate three layers of routing. The Auto-Attendant Menus (DTMF) workflow, diagrammed below, acts as an Interactive Voice Response tree to the customer. It plays a menu announcement configured in the Inbound Template, and assigns a Distribution Parameter Group or an Inbound Parameter Group based on the digit (touch tones) collected. For example: The announcement gives the customer three choices (Press 1 for Customer Service, 2 for Sales, and 3 for Technical Support):

- Touch tone 1 = Customer Service (Distribution Template)
- Touch tone 2 = Sales (Distribution Template)
- Touch tone 3 = Tech Support at Route Point 6001 (the Inbound Template that matches the DNIS for the Technical Support Route Point)

The auto-attendant flow can accommodate up to three cycles during a call. In the example above, Touch tone 2 (Sales) might give the caller a second set of options: for Product A, press 1; for product B, press 2, and so on. To learn how to build your menus, see [Voice routing configuration](#).

Call distribution

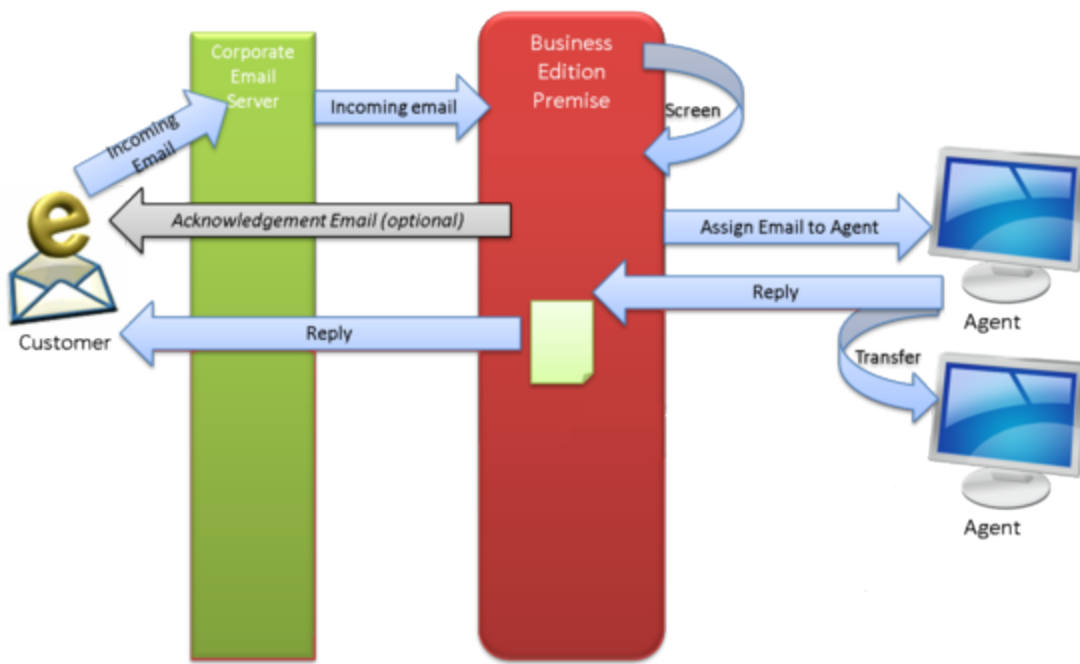
The Distribution call flow distributes the call to an agent:

1. It collects statistics to determine what agents are logged in and available to take the call.
2. It routes the call to an agent from a target agent group: it first tries an agent from Target 1, then, in sequence, tries Targets 2, 3, and 4 if it does not find an agent within the timeout set for that target. Finally, if it does not find an agent from Targets 1-4 within the allotted time, it sends the call to the overflow target, which can be a standard telephone number (such as 415-555-1212) or a routing point (such as 6001). Note that Targets 2-4 are optional; routing skips any undefined targets.

The application plays queue music in a loop until the call is distributed to an agent or abandoned.

Redirect On No Answer (RONA): if the call has already been distributed to an agent who does not answer, the Distribution flow distributes the call as if it had not been previously distributed, and sets to *Not Ready* the status of the agent who did not answer.

Email routing overview



Email routing

The Business Edition Premise email routing application can:

- Screen incoming email subject lines for recognized terms
- Enable supervisor review before the emailer receives an agent response
- Distribute the email to a target agent group
- Send an acknowledgement based on contact center status

Content screening

If you enable screening, the application scans the subject line of the email, looking for terms that match those defined in the screening rules. If it finds a match, it uses the parameter values defined in one of the five Category parameter groups.

For example, if the email subject includes the term "annoyed", and the Category2 screening rule includes the term "annoyed", the application uses the Category2 parameter group values, such as Email supervisor review=True and Email supervisor review percentage=100, meaning that a supervisor will review every response to such an email.

If there is no match or screening is not enabled, the application assigns the default category.

Distribution

The screening rule also determines the target and overflow agent groups. If the email is not handled by an agent from the *Email target agent group* within the *Email target timeout* (default is one hour), the email is routed to the *Email overflow target agent group*. If the email is not handled by an agent from the overflow target agent group within the *Email overflow target timeout* (default is one day), the email returns either to the target agent group or to the overflow agent group, at a higher priority.

Acknowledgements

Like the voice routing application, the email application can send a different acknowledgement email based on the status of the contact center: open, closed, or special day.

Known Issues and Corrections

<tabber>

General=

This tab includes known issues found in or affecting **all** versions of Business Edition Premise 8.1.101. If you are using a localized version of BEP, the issues listed under the tab for your localized version also apply.

To view known issues in BEP components, click the links in the Release Note column of the **Components** topic.

Incoming calls temporarily not routing

In rare cases under heavy load, Orchestration Server (ORS) can terminate unexpectedly, causing BEP to stop processing inbound calls. The issue does not affect existing calls already being processed by an agent, but all incoming calls are abandoned and those currently in queue are stuck on Media Control Platform until the caller releases. (ORS-1393)

Found in: BEP 8.1.101.07

Workaround: None, but ORS restarts automatically.

eServices component shutdown through the eServices Solution can cause voice call routing to stop

If you have deployed the email option in Business Edition Premise, any subsequent stoppage of eServices using the eServices solution shuts down call routing due to the presence of shared components in eServices and voice solutions. (ESHDP-153)

Workaround: Do not use the eServices solution to shut down eServices while voice call routing is ongoing; to shut down eServices, shut down the individual eServices applications.

| - | English=

Latest version: 8.1.101.22

This tab includes known issues found in or affecting English (U.S.) versions of BEP. All issues under the General tab also affect the English localization.

To view known issues in BEP components, click the links in the Release Note column of the **Components** topic.

ORS can quit unexpectedly

ORS can quit unexpectedly when disconnecting from the T-Server. (ORS-1496)

Found in: BEP 8.1.101.07 | **Fixed in:** BEP 8.1.101.22

Workaround: None, but ORS restarts automatically.

Genesys Administrator Extension displays incorrect time zone

The Genesys Administrator Extension application does not indicate the correct time zone for end time of deployed solutions. (GAX-5422)

Found in: BEP 8.1.101.07

Workaround: None.

Special Day auto-response email does not display date

In a localized environment, the auto-response email sent to customers on a special day does not include the correct reopening date. The email instead displays the following error message:

```
$Error: Cannot evaluate method (Date):  
com.genesyslab.icc.util.stencil.expr.EvalException: ParseException (GRA-426)
```

Found in: Genesys Routing Applications 8.1.002.01 | **Fixed in:** Genesys Routing Applications 8.1.002.06

EZPulse Collector service is initially set to start-up type automatic

The EZPulse Collector service is initially set to start-up type automatic instead of manual. As a result, the service is shown as running before tune-up script execution. (GENONE-1025)

Found in: BEP 8.1.100.20 | **Fixed in:** BEP 8.1.101.07

SS_Rep application has two option sections for logging

The SS_Rep application has two option sections, log and Log, while it should have just one. (GENONE-1016)

Found in: BEP 8.1.100.20 | **Fixed in:** BEP 8.1.101.07

32-bit rather than 64-bit versions of MCP and RM installed

The 32-bit versions of the Media Control Platform and Resource Manager applications are installed rather than the 64-bit versions. (GENONE-982)

Found in: BEP 8.1.100.20 | **Fixed in:** BEP 8.1.101.07

ORS not processing interactions received for email

After eServices is deployed in BEP, ORS does not process the interactions it receives for email until it

is restarted. (ORS-1445)

Found in: BEP 8.1.100.20 | **Fixed in:** BEP 8.1.101.07

Duplicate entries for logs created in Genesys Administrator

When creating a new application for Stat Server in Genesys Administrator using the wizard and importing the templates and metadata, duplicate entries (log and Log) are created. (SS-5706)

Found in: BEP 8.1.100.20 | **Fixed in:** BEP 8.1.101.07

| - | French =

Latest version: 8.1.101.22

This tab includes known issues found in or affecting French (France) versions of BEP. All issues under the General tab also affect the French (France) localization.

To view known issues in BEP components, click the links in the Release Note column of the [Components](#) topic.

ICON purge job does not complete

In the FRA localization (8.1.101.07), the nightly ICON database purge does not complete, causing the ICON database to grow indefinitely. (GENONE-1074)

Found in: BEP 8.1.101.07 | **Fixed in:** BEP 8.1.101.10

Special Day auto-response email does not display date

In a localized environment, the auto-response email sent to customers on a special day does not include the correct reopening date. The email instead displays the following error message:

```
$Error: Cannot evaluate method (Date):  
com.genesyslab.icc.util.stencil.expr.EvalException: ParseException (GRA-426)
```

Found in: Genesys Routing Applications 8.1.002.01 | **Fixed in:** BEP 8.1.101.10

ORS can quit unexpectedly

ORS can quit unexpectedly when disconnecting from the T-Server. (ORS-1496)

Found in: BEP 8.1.101.10 | **Fixed in:** BEP 8.1.101.22

Workaround: None, but ORS restarts automatically.

Genesys Administrator Extension displays incorrect time zone

The Genesys Administrator Extension application does not indicate the correct time zone for end time

of deployed solutions. (GAX-5422)

Found in: BEP 8.1.101.10

Workaround: None.

MSSQL system databases use different collation than Genesys databases

The MSSQL system databases (master, tempdb) use a different collation than the Genesys databases. (GENONE-1095)

Found in: BEP 8.1.101.10 | **Fixed in:** BEP 8.1.101.22

| - | German =

Latest version: 8.1.101.22

This tab includes known issues found in or affecting German versions of BEP. All issues under the General tab also affect the German localization.

To view known issues in BEP components, click the links in the Release Note column of the **Components** topic.

ORS can quit unexpectedly

ORS can quit unexpectedly when disconnecting from the T-Server. (ORS-1496)

Found in: BEP 8.1.101.09 | **Fixed in:** BEP 8.1.101.22

Workaround: None, but ORS restarts automatically.

Genesys Administrator Extension displays incorrect time zone

The Genesys Administrator Extension application does not indicate the correct time zone for end time of deployed solutions. (GAX-5422)

Found in: BEP 8.1.101.09

Workaround: None.

MSSQL system databases use different collation than Genesys databases

The MSSQL system databases (master, tempdb) use a different collation than the Genesys databases. (GENONE-1095)

Found in: BEP 8.1.101.09 | **Fixed in:** BEP 8.1.101.22

| - | Spanish =

Latest version: 8.1.101.22

This tab includes known issues found in or affecting Spanish versions of BEP. All issues under the General tab also affect the Spanish localization.

To view known issues in BEP components, click the links in the Release Note column of the [Components](#) topic.

ORS can quit unexpectedly

ORS can quit unexpectedly when disconnecting from the T-Server. (ORS-1496)

Found in: BEP 8.1.101.12 | **Fixed in:** BEP 8.1.101.22

Workaround: None, but ORS restarts automatically.

Genesys Administrator Extension displays incorrect time zone

The Genesys Administrator Extension application does not indicate the correct time zone for end time of deployed solutions. (GAX-5422)

Found in: BEP 8.1.101.12

Workaround: None.

| - | Portuguese=

Latest version: 8.1.101.22

This tab includes known issues found in or affecting Portuguese (Brazil) versions of BEP. All issues under the General tab also affect the Portuguese (Brazil) localization.

To view known issues in BEP components, click the links in the Release Note column of the [Components](#) topic.

ORS can quit unexpectedly

ORS can quit unexpectedly when disconnecting from the T-Server. (ORS-1496)

Found in: BEP 8.1.101.13 | **Fixed in:** BEP 8.1.101.22

Workaround: None, but ORS restarts automatically.

Genesys Administrator Extension displays incorrect time zone

The Genesys Administrator Extension application does not indicate the correct time zone for end time of deployed solutions. (GAX-5422)

Found in: BEP 8.1.101.13

Workaround: None.

| - | Japanese =

Latest version: 8.1.101.22

This tab includes known issues found in or affecting Japanese versions of BEP. All issues under the General tab also affect the Japanese localization.

To view known issues in BEP components, click the links in the Release Note column of the **Components** topic.

GI2 Language Pack is available for Japanese locales

The GI2 Language Pack is available at <http://g1-core-p/ips>, in the following file format: `gi2-lp-<version>-<locale>.zip`. To select a Language Pack, login to CMC as an Administrator, go to **Preferences**, and select the appropriate Product Locale. (GENONE-1175)

Interaction Workspace does not support spelling-checks for Japanese

The BEP documentation should mention how to add or create IWS spell-checkers for Japanese and Simplified Chinese locales. (GENONE-1130)

Found in: BEP 8.1.101.22

Workaround: If you are using the Japanese version of BEP, Genesys recommends that you create your own dictionary for IWS spelling-checks. For instructions on how to do this, see the Interaction Workspace documentation, specifically the Spelling tab on the **Handling Interactions** page.

Composer Help must be manually switched to Japanese

After installing BEP for Japanese locales, users must manually switch Composer Help to Japanese.

Found in: BEP 8.1.101.19

Workaround: To switch Composer Help to Japanese, do the following:

1. Launch Composer.
 2. Select **Main Menu > Edit > Preferences**.
 3. Select **Composer > Help**
 4. In the **Online Wiki URL** edit box, enter the following value:
`http://docs.genesys.com/wiki/index.php?title=Special:ComposerHelp&keyword={keyword}&locale=ja-JP&version={version}`
 5. Click **OK**.
-

Genesys Administrator Extension displays incorrect time zone

The Genesys Administrator Extension application does not indicate the correct time zone for end time of deployed solutions. (GAX-5422)

Found in: BEP 8.1.101.19

Workaround: None.

Multibyte Character Sets (MBCS) appear as squares in charts associated with GI2 reports

Multibyte Character Sets in charts associated with GI2 reports can appear as squares. (GENONE-1128)

Found in: BEP 8.1.101.19

Workaround: You can modify the default display font of the report charts by changing the Web Intelligence default view format to **interactive** and then selecting the appropriate font. For more information about Web Intelligence, see the Business Objects documentation.

ORS can quit unexpectedly

ORS can quit unexpectedly when disconnecting from the T-Server. (ORS-1496)

Found in: BEP 8.1.101.19 | **Fixed in:** BEP 8.1.101.22

Workaround: None, but ORS restarts automatically.

ORS runs out of memory after one hour of traffic in a 7x24 environment

The ORS application runs out of memory in a 7x24 environment after one hour of traffic. (ORS-1610)

Found in: BEP 8.1.101.19 | **Fixed in:** BEP 8.1.101.22

| - | Chinese=

Latest version: 8.1.101.22

This tab includes known issues found in or affecting Chinese versions of BEP. All issues under the General tab also affect the Chinese localization.

To view known issues in BEP components, click the links in the Release Note column of the **Components** topic.

GI2 Language Pack is available for Simplified Chinese locales

The GI2 Language Pack is available at <http://g1-core-p/ips>, in the following file format: gi2-lp-<version>-<locale>.zip. To select a Language Pack, login to CMC as an Administrator, go to **Preferences**, and select the appropriate Product Locale. (GENONE-1175)

Interaction Workspace does not support spelling-checks for Simplified Chinese

The BEP documentation should mention how to add or create IWS spell-checkers for Japanese and Simplified Chinese locales. (GENONE-1130)

Found in: BEP 8.1.101.22

Workaround: If you are using the Simplified Chinese version of BEP, Genesys recommends that you create your own dictionary for IWS spelling-checks. For instructions on how to do this, see the Interaction Workspace documentation, specifically the Spelling tab on the [Handling Interactions](#) page.

Genesys Administrator Extension displays incorrect time zone

The Genesys Administrator Extension application does not indicate the correct time zone for end time of deployed solutions. (GAX-5422)

Found in: BEP 8.1.101.19

Workaround: None.

Multibyte Character Sets (MBCS) appear as squares in charts associated with GI2 reports

Multibyte Character Sets in charts associated with GI2 reports can appear as squares. (GENONE-1128)

Found in: BEP 8.1.101.19

Workaround: You can modify the default display font of the report charts by changing the Web Intelligence default view format to **interactive** and then selecting the appropriate font. For more information about Web Intelligence, see the Business Objects documentation.

ORS can quit unexpectedly

ORS can quit unexpectedly when disconnecting from the T-Server. (ORS-1496)

Found in: BEP 8.1.101.19 | **Fixed in:** BEP 8.1.101.22

Workaround: None, but ORS restarts automatically.

ORS runs out of memory after one hour of traffic in a 7x24 environment

The ORS application runs out of memory in a 7x24 environment after one hour of traffic. (ORS-1610)

Found in: BEP 8.1.101.19 | **Fixed in:** BEP 8.1.101.22

Installing Business Edition Premise

Business Edition Premise typically comes pre-installed on a server; if you have already received the server, you can skip these topics and start with [deployment of the routing applications](#). You can, however, procure the required server and install Business Edition Premise on it yourself, as detailed in these topics.

Next: [Off-site installation](#).

Off-site installation

This topic describes the steps required to install Business Edition Premise on a server before it is delivered to the customer site. After you successfully complete these steps, the off-site portion of the Business Edition Premise installation is complete and you can proceed to the **on-site** portion of the installation, to be performed at the customer site.

<multistep> Procure the required hardware=

Hardware requirements

The hardware required to run Business Edition Premise depends on the number of agents in the contact center.

100 to 300 agents

Requirement	Minimum configuration
Server type	Dell PowerEdge R720 or Genesys BEP300
Processor	Intel Xeon E5-2665 2.40 GHz, 20 M Cache, 8.0 GT/s QPI, Turbo, 8 C, 115 W, Max Mem 1600 MHz
Additional processor	Intel Xeon E5-2665 2.40 GHz, 20 M Cache, 8.0 GT/s QPI, Turbo, 8 C, 115 W
Memory (RAM)	96 GB
Controller	PERC H710P 1 GB RAID Controller
Hard drives	7x300 GB 15 K SAS disks: 6 disks for RAID5 + 1 hot spare; 2.5 inch drive chassis
Guest Operating System	Microsoft Windows 2008 Server R2
Hypervisor Operating System	ESXi 5.1

Fewer than 100 agents

Requirement	Minimum configuration
Server type	Dell PowerEdge R420 or Genesys BEP100
Processor	Intel Xeon E5-2470 2.30 GHz, 20 M Cache, 8.0 GT/s QPI, Turbo, 8 C, 95 W, Max Mem 1600 MHz
Additional processor	Intel Xeon E5-2470 2.30 GHz, 20 M Cache, 8.0 GT/s QPI, Turbo, 8 C, 95 W
Memory (RAM)	48 GB
Controller	PERC H710P 1 GB RAID Controller
Hard drives	7x300 GB 15 K SAS disks: 6 disks for RAID5 + 1 hot spare; 2.5 inch drive chassis
Guest Operating System	Microsoft Windows 2008 Server R2
Hypervisor Operating System	ESXi 5.1

|–| Provision the network= Provision the network to include:

- One IP address within a management control subnet for Dell iDRAC setup and configuration.
- One IP address within the same subnet and available on a Windows domain running DNS/DHCP services for ESXi5.1 server.

|–| Set up the server hardware and iDRAC=

1. Perform the initial hardware setup of the server:
 - Connect a network cable to the iDRAC internal management board.
 - Connect a network cable to port 1 of the main Ethernet board (integrated with the motherboard).
 - Connect the power cable.
 - Directly attach a monitor, keyboard, and mouse.
 2. Power-on the server by pressing the power button on the front of the console.
 3. After the Dell Lifecycle Controller completes the system inventory and displays the **Settings - Language and Keyboard** screen, do the following:
 - Select **Next** to accept the defaults for **Language and Keyboard Type** (English/United States).
 - On the **Network Settings** screen, select **DHCP** from the **IP Address Source** drop-down list and click **Finish**.
 4. Configure the server for remote access using the iDRAC management board:
 - Go to **Hardware Configuration > Configuration Wizards > iDRAC settings > Network**.
 - Record the **MAC Address** displayed under **Network Settings** (this is required for an upcoming step).
 - In the **IPv4 Settings** section, set **Enable DHCP** and **Use DHCP to obtain DNS server addresses** to **Enabled**.
 - In the **IPMI Settings** section, set **Enable IPMI Over LAN** to **Enabled**.
 - Click **Back**.
 - Click **Finish** and select **Yes** to save the changes.
 - Click **System Time and Date Configuration**.
 - Set **Time** to the current local time.
 - Click **Finish** and then click **Back** to exit the Configuration Wizard.
 - Go to **System Setup > Advanced Hardware Configuration > System BIOS > System Profile Settings**.
 - From the **System Profile** drop-down menu, select **Performance**.
 - Click **Back**.
 - Click **Finish** and select **Yes** to save the changes.
 5. Update DHCP and DNS for the iDRAC management board:
 - Enter the MAC address you recorded earlier into the DHCP server configuration and restart the DHCP service.
-

- Update the DNS server with the iDRAC hostname and IP address.
- You can access the system using iDRAC by entering the following URL into a browser:
`https://<hostname or ip address>/login.html`

The default iDRAC username and password are as follows:

Username: root

Password: calvin

For more information about iDRAC, see the Dell Owner's Manual for your **R720** or **R420**, particularly the section "iDRAC Settings Utility", and also the iDRAC7 User's Guide available at [Dell product support](#).

|–| Obtain licenses= Obtain the following licenses:

- One Microsoft SQL Server 2008 R2 64-bit license with 50 client access licenses required for internal access of server components.
Important: This license to be applied on the Premise site.
- Three Microsoft Windows Server 2008 R2 64-bit licenses with the appropriate number of client access licenses.
Important: These licenses to be applied on the Premise site.
- One VMware vSphere Server ESXi 5.1 license.
- Alternatively, you can purchase the BEP Operations pack from Genesys, which contains appropriate licenses from Microsoft without the need for client access licenses.
- One Genesys software license for 100 or 300 agents.
Important: The MAC address information required for this license is obtained from the core VM during server configuration.

|–| Configure the server=

Important

The creation of a root password for the ESXi server and the configuration of additional user accounts is at the discretion of the party performing the installation.

Configure the Dell or Genesys server by completing the following steps:

1. Configure the RAID array:
 - Press **<CTRL> + <R>** during POST to enter the RAID Configuration Utility.
 - Confirm that RAID is configured as RAID 5 with a single hot spare drive.
 - Enable RAID controller caching.
 - Under the **Advanced Settings** menu for the virtual disk, set the write policy to **write-back** and the read policy to **read-through**.
2. Modify the boot sequence for the server:
 - Press **F2** during POST to enter the system BIOS.

- From the BIOS menu, select **System Setup Main Menu > System BIOS > Boot Settings > Bios Boot Settings > Hard-Disk Drive Sequence**.
 - Move **Integrated RAID Controller 1:PERC H710P Mini(bus 01 dev 00)** to the top of the list.
3. Install VMware vSphere 5.1 Standard ESXi Server, using the license you procured. Give the server a unique name such as `bep_location`.
See [VMware vSphere ESXi and vCenter Server 5.1 Documentation](#) (open in a new window or tab).
4. If you are installing the VMs off-site, you must perform the following steps, which you will need to repeat at the customer site (see [On-site installation](#)):
- Power on the ESXi server and retrieve its MAC address (for setup in a DHCP server to assign an IP address and in a DNS server so the host name of the ESXi server can be associated to the assigned IP address when first connected to the network):
 - Open the ESXi console for your ESXi server and go to **<F2> Customize System/View Logs > Configure Management Network > Network Adapters/<D> View Details**.
 - Copy the MAC address.
 - Log into the DHCP server.
 - In the Command window, configure the MAC address with the assigned IP address for the ESXi server.
 - Restart the DHCP server.

|–| Obtain the templates= Obtain the five OVA VM templates for importing into the ESXi Server (from either a network drive on the same subnet as the ESXi Server or from a Genesys-supplied hard drive).
 |–| Install a VMware vSphere 5.1 Client= Install a VMware vSphere 5.1 Client on any Windows workstation that has network connectivity to the ESXi Server.

Important

The ESXi server must be powered on.

1. Open a browser and enter the IP address assigned to the ESXi server.
The **VMware ESXi Welcome** page appears.
2. Click the download link for the VMware Sphere client to download and install.

For more information, see the [VMware vSphere ESXi and vCenter Server 5.1 Documentation](#) (open in a new window or tab). |–| Deploy the VMs=

1. To deploy the VMs onto the ESXi server, log in to the vSphere Client workstation as a user with ESXi administrator rights.
2. Open the vSphere client and deploy the five VMs: aux, core, db, gvp, ui.
The VM names use the format *VM role-platform-product version-language code*; for example, `g1-core-p-win2008r2std_sp1-8110020-enus`. **Important:** Do not change the format.

Dell R420 or Genesys BEP100 memory allocation: The default memory allocation for each VM applies to the Dell R720 or Genesys BEP300 and its 96GB of total memory. If you are installing the VMs on a Dell R420 or Genesys BEP100, you must open each VM Properties window and adjust the memory and processor allocation for each VM:

VM	Memory	Processors
Aux	4 GB	4
Core	6 GB	4
DB	6 GB	4
GVP	4 GB	4
UI	4 GB	4

[-] Enable VM restoration= To enable restoration of the VMs in case problems arise, you can take a snapshot of each VM in its current state. To take a snapshot, do the following for each deployed VM:

1. Right-click on the VM and select **Snapshot**.
2. From the Snapshot menu, select **Take Snapshot**.
3. In the Take Virtual Machine Snapshot window, enter a name and description for the snapshot.
4. Click **Ok**.

For more information about snapshots, see Using Snapshots To Manage Virtual Machines in the VMware in [VMware vSphere ESXi and vCenter Server 5.1 Documentation](#) (open in a new window or tab). [-] Confirm that the VMs start= Power on each VM and confirm that the VM starts by opening its Console window and verifying that the **Set Up Windows** screen is visible. Once confirmed, power off the VM.

Important: Do not proceed with the Set Up Windows steps unless the server is located at the customer site.

Tip

Although the tune-up script starts automatically on the VM after you log in, you can select to postpone the tune-up procedure until the next restart of the VM. To do so, select No when the script asks "Would you like to do the tune-up now?" The script automatically starts when the VM restarts at the customer site, and continues to run during each restart until it completes successfully.

[-] Off-site verification checklist= This step confirms that the off-site portion of the installation is complete and that the server is ready for delivery to the Premise site.

1. Login to iDRAC and confirm the following:
 - Verify a RAID 5 configuration (6 disks plus 1 hot spare).
 - Verify that the storage controller card is model H710P.
 - Confirm that disk sizes are 300 GB, 15K, SAS.
2. Connect to the ESXi server with a vSphere client and confirm that all five VMs are deployed and able to start.
 - Verify that the ESXi server has all CPUs (≥ 16 CPUs) and RAM (96 GB)
 - Verify that the five VMS are present (aux, core, db, gvp, ui), with snapshots for each.

-
- The MAC address for the g1-core-p VM is obtainable (used for ordering appropriate Genesys licenses).
 - If your deployment is a Dell 420 or BEP 100 (100 agents), the memory and CPU for VMs must be adjusted according to the table shown in the step for deploying the VMs.
 - Verify that all VMs are the same version. If you deployed the VMs according to the steps described in this documentation, the version is included in the name of the VM.

</multistep> Next: [On-site installation](#).

On-site installation

Important

The following steps must occur *at the customer site*, as they require specific customer network information.

<multistep> Required licenses=

Important

You require the following licenses before installing Business Edition Premise. If you do not have all required licenses, do not proceed with the installation steps.

- Three Windows Server 2008 license keys for activating Windows when starting each VM.
- One Genesys software license for either 100 or 300 agents.
- One Business Objects Enterprise (BOE) version 3.1 license key.
- One Microsoft SQL Server 2008 R2 64-bit license with 50 client access.

| - | Provision the network= Provision the network to include:

- Five IP addresses within a single subnet and available on the Windows domain running DNS/DHCP services for the Virtual Machines (VMs); you also need to assign five hostnames for the VMs for entry into a DNS server
- One IP address within a management control subnet for Dell iDRAC configuration, to enable hardware alarming via email (the address must be able to access the customer corporate email server)
- One IP address within the same subnet and available on a Windows domain running DNS/DHCP services for ESXi 5.1 server.

| - | Set up hardware monitoring= Your Dell server includes an Integrated Dell Remote Access Controller (iDRAC) that monitors the server hardware and can send email notifications to help you avoid the data loss that *will* occur if two drives in the RAID array fail.

Warning

Failure to monitor the health of your RAID array can result in loss of data. Ensure that you set up Dell hardware monitoring with email notification.

To configure the iDRAC to send email notifications:

1. Ensure that you have configured your iDRAC. See the section "iDRAC Settings Utility" in the Dell Owner's Manual for your **R720** or **R420**.
2. Use a browser to log into the Dell iDRAC at `https://IP address/login.html`, where *IP address* is the management interface IP address or DNS entry name. Enter the username and password that you specified when configuring the iDRAC.
3. Navigate to **Alerts > Alerts Filter**. Ensure that *only* **System Health, Storage, Warning, and Critical** are checked. Uncheck the other five items. Click **Apply**.
4. Under **Alerts and Remote System Log Configuration**, check the **Email** box in the heading for *each* of the 8 pages.
5. Select the **SNMP and E-Mail Settings** tab. Under **Destination E-mail Addresses**, add up to four addresses to receive alert emails. Check **State** for each address. Click **Apply**.
6. Under **SMTP (E-Mail) Server Address Settings**, enter the IP address or FQDN/DNS name of the corporate email server (authentication is optional). Click **Apply**.
7. Under **Destination E-mail Addresses**, click **Send** to send an email alert to each of the configured accounts.
8. Verify that each account received the test email.
9. Return to the **Alerts** tab. Enable alerts and click **Apply**.

| - | Configure the server=

1. Configure the external interfaces:
 - Media Gateway/SBC: add network bandwidth and provision the network infrastructure
 - Agent phones: add network bandwidth and provision the network and phones
 - Organization email (if the customer selects the email option): provision the network
 - Organization backend servers (optional): provision the network and security information
 - Organization Network Management System (optional): provision the network and security information
2. For the optional email package, set up an account for the ESJ server to connect with the corporate email server to pick up incoming email.
 - Meet network voice requirements:
 - 50ms between particular endpoints
 - MOS > 4
 - R factor > 70
 - network jitter < 40ms
 - RTP packet loss 0
3. The customer is responsible for the following:
 - Completing a backup of the system after installation
 - Updating Genesys One credentials after installation
 - Installing anti-virus software consistent with corporate guidelines (Genesys does not recommend anti-virus software running on hosts with SIP RTP messaging as it can affect voice quality)

- Enabling security policies/firewall per corporate guidelines
- Installing updates
- Being aware that FTC regulations may require that Outbound Contact Server (OCS) audit logs be stored for up to 24 months. Due to storage limitations, the log zip utility on the Core VM is configured to only retain these logs for a maximum of 60 days. Customers must move these logs to external storage before the 60-day expiration.

|–| Update DHCP and DNS servers for ESXi= Power on the ESXi server (if needed) and retrieve its MAC address (for setup in a DHCP server to assign an IP address and in a DNS server so the host name of the ESXi server can be associated to the assigned IP address when first connected to the network):

1. Open the ESXi console for your ESXi server and go to **<F2> Customize System/View Logs > Configure Management Network > Network Adapters/<D> View Details**. Copy the MAC address.
2. Log into the customer DHCP server. In the Command window, replace the existing MAC address for the ESXi server.
3. Restart the DHCP server.
4. Update the customer DNS server with new host name of the ESXi server and the IP address assigned from the customer pool of addresses and given out by their DHCP server.

|–| Update DHCP and DNS servers for VMs= Before you power on the VMs, retrieve their MAC addresses (from VM properties) to populate the DHCP server and update the DNS server:

1. In the vSphere Client inventory, right-click each virtual machine and select **Edit Settings > Network adapter 1** to view its MAC address. Copy each address.
2. Log into the DHCP server. In the Command window, replace the existing MAC address for each VM.
3. Restart the DHCP server.
4. Update the customer DNS server with the new host names of the VM servers and the IP addresses assigned from the customer pool of addresses and given out by their DHCP server.

|–| Configure NTP to synchronize VMs= Configure an NTP (network time) daemon to synchronize the customer VMs.

1. In the vSphere Client, select the ESXi server, and then select the **Configuration** tab.
2. From the **Software** menu, click **Time Configuration** and select **Properties**.
3. Select **NTP Client Enabled** and then click **Options**. The **NTP Daemon (ntpd) Options** window opens.
4. In the **NTP Daemon Options** window, do the following steps:
 - Under **General**, select **Start and stop with host**.
 - Under **NTP Settings**, add an NTP Server in the customer time zone (the **NTP Server website** lists available NTP servers) and select **Restart NTP service to apply changes**.
 - Click **OK**.
5. Click **OK** again to close the **Time Configuration** window.

|–| Power on the Core VM=

1. Power on the Core VM (this step must take place before you power on any of the other VMs).
2. In Windows setup, enter the locale and product key, accept the license terms, and change the password. (For localized versions, you must first select a language before proceeding with Windows setup.)
3. Confirm that the dialog for changing the user password at the first login appears. The Windows desktop loads and the tuneup script automatically runs.

|–| Configure the VM using the tuneup script=

1. After the tuneup script launches automatically, enter values when prompted:
 - Host naming scheme:
 - Select 1 to use default host names (g1-core-p, g1-ui-p, g1-db-p, g1-aux-p, g1-gvp-p). Use this option for environments that you do not plan to extend and if the default naming convention suits your needs.
 - Select 2 to use default host names with custom suffixes (such as g1-core-p-env1). The script prompts you for the suffix. Use this option if default names with suffixes agree with your host naming convention. **Important:** The suffix can contain no more than 4 characters.
 - Select 3 to use custom names for each host (such as newyork-core and newyork-ui). The script prompts you for each name, which should identify the role of the host (core, ui, db, aux, or gvp). Use this option if you need to conform to a customer naming convention. **Important:** Each host name can contain no more than 15 characters.
 - Domain configuration (this setting defines how the FQDN of the hosts is presented in Genesys Configuration; Genesys software uses these names when establishing network connections):
 - Select 1 to have the tuneup script use the domain name that it detects automatically.
 - Select 2 (Other domain name) to enter the domain name manually. When prompted, enter the domain name.
 - Select 3 if your environment does not require a domain name.
 - Rename? Yes
 - Reboot? Yes

Important: Ensure that the Core VM fully restarts before you proceed.

To verify that the IP address is correct, run the Windows command `ipconfig/all`. If the host received proper IP configuration from your DHCP Server, the values will match your network settings.

To verify that the server can reach the remote host, ping an external server (such as a server you plan to use for your agent desktops) by running the command `ping remote host name or IP address`. The remote host must be reachable via ping and the output of the ping command looks similar to this example (note the shortened output and sample IP addresses; ping times may vary):

Pinging agent-desktop.domain.com [1.2.3.4] with 32 bytes of data:

Reply from 1.2.3.4: bytes=32 time<1ms TTL=128

Reply from 1.2.3.4: bytes=32 time<1ms TTL=128

Reply from 1.2.3.4: bytes=32 time<1ms TTL=128

Reply from 1.2.3.4: bytes=32 time<1ms TTL=128

Ping statistics for 1.2.3.4:

Packets: Sent = 4, Received = 4, Lost = 0 (0% loss)

Approximate round trip times in milli-seconds:

Minimum = 0ms, Maximum = 0ms, Average = 0ms

From the remote host you just pinged, open the console window and issue the following command:

ping *Core VM name or IP address*

The Core VM host must be reachable and the output of ping command must look similar to the example in the previous substep.

Tip

If you enter incorrect information during the tuneup script configuration, Genesys recommends that you redeploy the Core VM and begin the tuneup script configuration again. If you made a snapshot of the Core VM prior to entering any data for the tuneup configuration script, you can revert to that snapshot. This approach can also be applied to the other VMs; however, if you redeploy the Core VM (or revert to a snapshot), you must also redeploy the other VMs.

| - | Apply licenses and configuration changes= **WATCH:** To view a short demonstration of the license



application, click the Genesys icon below:

In the **Initial Configuration Tasks** window in the vSphere client on the Core VM:

1. Set the time zone in the format *Continent/City or Region*. For a list of time zones, see the TZ column in [List of tz database time zones](#).
2. Set up Genesys License Manager by placing the Flex LM license file (acquired earlier) in the **GCTI\flexlm** folder.

Important

Altering the Windows Operating System Regional settings (other than time zone) may result in a failure when attempting to apply the MS SQL Server 2008 license key at the completion of the BEP installation.

3. To add the Microsoft SQL Server 2008 R2 64-bit license:

- Go to **Start > All Programs > Microsoft SQL Server 2008 R2 > Configuration Tools > SQL Server Installation Center (64-bit)**
- Select **Maintenance**.
- Select **Edition Upgrade**, and click **OK** to begin the setup.
- Click **Next** through the Setup Support Rules.
- Enter the Product Key, and click **Next**.
- Accept the license terms, and click **Next**.
- Select the Instance, and click **Next**.
- Click Upgrade.

4. If your environment uses a domain, you can add it by doing the following:

- Click **Provide computer name and domain**.
- In the **System Properties** window, click **Change**.
- In the **Computer Name/Domain Changes** window, select **Domain** and enter the domain name.
- Click **OK**.

5. Reboot the VM.

| - | Verify the Genesys services=

1. Click **Start**.
2. To verify this step, enter Services in the **Search programs and files** dialog box.
3. Select **Services** and locate groups of services with names starting with Genesys in the list of local services.
4. Check the status and startup type of these services. All Genesys services are in status *Started*, with startup type *Automatic*.

| - | Enter Configuration Manager details=

1. On the console of the Core VM, click **Start** and select **All programs > Genesys Solutions > Start Configuration Manager**.
2. In the dialog box, enter:
 - User name: default
 - Password: password
 - Application: default
 - Host name: localhost
 - Port: 8888

Before proceeding to the next step, ensure that Configuration Manager starts and its main window displays Environment and Resources objects. | - | Configure db, aux, and gvp VMs=

1. Configure the db, aux, and gvp VMs, beginning with the **db** VM (do not configure the **ui** VM until the next step):
 - Power on each VM. In Windows setup, set the locale and the product key, accept the license terms, and change the password. (For localized versions, you must first select a language before proceeding with Windows setup.) To verify, use the same criteria as for the core server.
 - The tuneup script automatically launches. When prompted:
 - Enter the Primary Core Host IP address (do not use the host name).
 - Enter Yes to rename and restart the VM. Ensure that each VM fully restarts before you proceed.
2. Configure the time zone settings:
 - **For DB VM only:** The time zone is configured as part of the tuneup script. Set the time zone for GIM in the format *Continent/City or Region*. For a list of time zones, see the TZ column in [List of tz database time zones](#).
 - **For all VMs:** In the **Initial Configuration Tasks** window, click **Set time zone**. Configure the time zone in the format *Continent/City or Region*. For a list of time zones, see the TZ column in [List of tz database time zones](#).
3. If your environment uses a domain, select **Provide computer name and domain > Change** and enter the domain name.
4. In the Windows security window, enter the administrator ID and password.
5. Restart the VM.

|–| Configure ui VM=

1. Power on the **ui** VM. In Windows setup, set the locale and the product key, accept the license terms, and change the password. To verify, use the same criteria as for the core server.
2. The UI tuneup script automatically launches. When prompted:
 - Enter the Primary Core Host IP address.
 - Enter Yes to rename and restart the VM.
3. The **tuneup_boe.bat** script launches automatically. Enter the BOE license code (which Genesys does not provide).
4. Wait for the BOE tuneup script to finish and close (the script can take 30 minutes or more to complete).
5. In the **Initial Configuration Tasks** window, set the time zone in the format *Continent/City or Region*. For a list of time zones, see the TZ column in [List of tz database time zones](#).
6. If your environment uses a domain, select **Provide computer name and domain > Change** and enter the domain name.
7. In the Windows security window, enter the administrator ID and password.
8. Restart the VM.

|–| Configure BOE for GI2=

Important

This step is only required for Business Edition Premise version 8.1.100.20. If you have a later version, you can skip this step.

1. To configure BOE for GI2, open the ui VM after the ui VM fully restarts for the second time.
2. Open Business Objects Universe Designer and log in with these credentials:
 - System: *your ui host name*:6400
 - User: administrator
 - Password: G3n35y5
 - Authentication: Enterprise
3. Create a connection, **MSSQL 2008 > JDBC**, that uses these values:
 - Connection name: GI2-JDBC
 - Username: sa
 - Password: G3n35y5!
 - Server host: *your db host name*:1433
 - Database: gim_etl
4. Import Universe from the folder **Interactive Insights > 8.1.1**.
5. In the Universe Parameters window, specify the new GI2-JDBC connection.
6. Export the Universe.

|–| Backup the VMs= Genesys recommends that you backup the VMs by exporting them to an external location or device.

1. Open the vSphere Client.
2. For each VM, do the following:
 - Power off the VM.
 - In the vSphere client, highlight the target VM and select **File > Export > Export OVF Template**.
 - For the file format, select Single File (OVA).
 - Specify the output file name and location.
 - Export the file.

</multistep>

Next: [Deploy the routing applications](#).

Deploying the routing applications

To deploy the Business Edition Premise routing applications, you deploy the voice solution definition and, optionally, the email solution definition in Genesys Administrator Extension (GAX). Solution definitions are also known as solution package definitions, or SPDs.

The email routing application also requires you to deploy eServices applications, import Knowledge Manager templates, and deploy the email strategy.

To deploy the routing applications, follow the procedures in [Deploying the voice routing application](#) and, if applicable, [Deploying the email routing application](#).

Deploying the voice routing application

Important

You do not need to perform these steps if you are using Business Edition Premise version 8.1.101.19 or later.

<multistep> Add Trusted Sites to Internet Explorer= To use Internet Explorer 10 to access Genesys Administrator Extension or Genesys Administrator, you must add the following to the IE Trusted Sites:

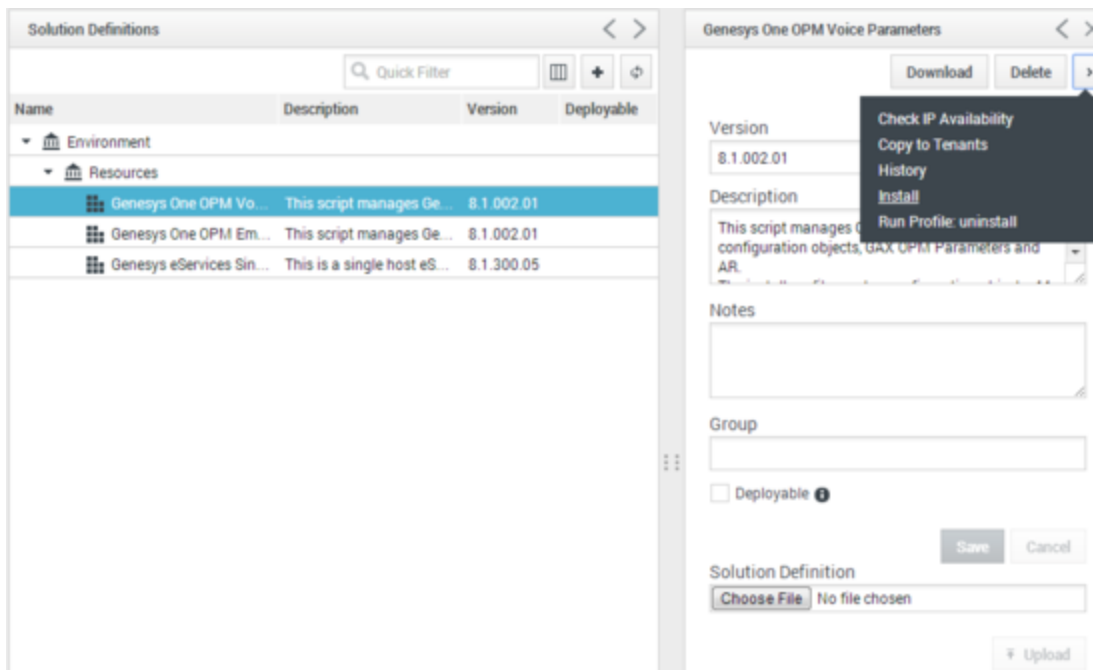
- `http://your UI VM domain`
- `about:blank`

|–| Extract the zip file=

1. In a browser, go to `http://Core VM name or IP address/ips`.
2. Locate, download, and extract `voice_strategy_ext_version.zip`.

|–| Install the voice solution definition=

1. In a browser, open Genesys Administrator Extension (**UI VM name or IP address:8080/gax**), navigate to **Configuration > Solution Definitions**, click **+**, and upload **GenesysOne_OPM_Voice_ENU.xml** (which you just extracted).
2. Select **Genesys One OPM Voice Parameters**, select **Install** from the **>** menu next to the Delete button (see the graphic below), and then complete the wizard, using default values except for:
 - GAX host: *your UI VM host name*
 - GAX user name: `default`
 - GAX password: `password`
 - Routing Stat Server Application: `SS`
 - Switch: `SIP_Switch`
 - Application Server Host: *your Core VM host name*
 - Name for Inbound PG: `6000`
 - Name for Distribution PG: `Dist_PG`
 - Number For RONA RP: `9990`



SPD installation

-| Make a test call to the routing point=

1. In GA, set the SIPS TServer option enable-unknown-gateway to true. The deployment is successful if the call connects and you hear an announcement (during closed hours) or queue music (during open hours).

Important

After completing the verification process, restore the value to false. This secures the SIP Server so that it only accepts calls from configured Trunk DNs within the configuration environment.

</multistep>

Deploying the email routing application

If you are not installing the email option, skip the following steps. <multistep> Deploy the eServices applications for email=

1. In GAX, go to **Configuration > Solution Definitions** and click +.
2. Locate and upload the following file: \\g1-ui-p\c\$\GCTI\eSrvPluginGAX\spd\ **eServicesSingleHostDeployment.xml**
3. Select **Genesys eServices Single Host Deployment**.
4. From the > menu next to the **Delete** button, select **Install**, using default values except for:
 - Uncheck **Activate chat-media support**
 - DB Server for Interaction Server: DBServer_AUX
 - DB Server for Interaction Concentrator: DBServer_ICON
 - Database Administrator Name: sa
 - Database Administrator Password: G3n35y5!
 - Database User Name: sa
 - Database User Password: G3n35y5!
 - Set the customer Email Server Client Address, Email Server Domain Name, and Email Server POP Client Login Password

|~| Install the email solution definition=

1. In GAX, go to **Configuration > Solution Definitions** and select **Genesys One OPM Email Parameters**.
2. Complete the wizard, using default values except for:
 - GAX host: *UI host name*
 - Switch: eServices_Switch
 - Email address: the Do Not Reply address that you select for the customer mail server
 - Email Sample Configuration: True

|~| Import the Knowledge Manager templates= **Important:** Localized versions of the templates do not include the required categories, so even for localized environments you must import the **GenesysOne_KnowledgeManager_Rules_Responses_ENU.kme** file.

1. In Genesys Administrator, ensure that the eServices solution is started.
2. Go to <http://Core VM host name or IP address/ips> and locate and download `email_strategy_ext_version.zip`. Unzip the file.
3. On the Aux host, copy the **GenesysOne_KnowledgeManager_Rules_Responses_ENU.kme** file to a temp folder on the local disk.

Important: If you are using Business Edition Premise version 8.1.100.20, this file is named

GenesysOne_KnowledgeManager_Rules_Responses.kme.

4. Start Knowledge Manager

- Application: eServices_KnowledgeManager
- Host: *your Core VM name*

5. Go to **File > Import** and select the kme file from the temp folder.
Important:

- Uncheck **Preserve uniqueness of objects**
- Check **Update screening rules.**

Click OK and ignore the 5 warnings.

6. If you are localizing your environment, and only after first importing the English kme file, you can import the localized kme files, one at a time (the example below uses the French version, **GenesysOne_KnowledgeManager_Rules_Responses_FRA.kme**):

- On the Aux host, copy the **GenesysOne_KnowledgeManager_Rules_Responses_FRA.kme** file (from the unzipped email_strategy_ext_version.zip file) to a temp folder on the local disk.
- Start Knowledge Manager
 - Application: eServices_KnowledgeManager
 - Host: *your Core VM name*
- Go to **File > Import** and select the kme file from the temp folder.

Important:

- Uncheck **Preserve uniqueness of objects**
- Check **Update screening rules.**

Click OK and ignore the 5 warnings.

7. If you are using Special Day Auto Responses in Email, you must manually change the Time Zones for AutoResponse:

- Start Knowledge Manager.
- Click **AutoResponse**, and then double-click **Special Day**.
- Locate the two instances of **TimeZone** and replace them with the correct time zone IDs.
Important: You must use time zone database IDs to indicate time zones. For a list of time zone database IDs, see http://en.wikipedia.org/wiki/List_of_tz_database_time_zones.
- Click **Check field Codes** to view the Special Day Auto Response with the field codes rendered.
- Click **OK**.

|-| Deploy the email strategy=

1. In a browser, go to <http://Core VM name or IP address/ips>. Locate, download, and extract the following zip files:

- email_strategy_version.zip
- composer_version_enus.zip

-
2. Install Composer 8.1.3 on a Windows system that is not one of the VMs and is not already running Apache Tomcat (to avoid port conflicts). Follow the installation instructions in the [Composer 8.1 Deployment Guide](#).
Note that Composer 8.1.3 is an Eclipse plugin that requires JDK 1.7 and a supported version of Eclipse. Composer installs its own Apache Tomcat server.
 3. Copy the GenesysOne_Email folder (from the email_strategy_ext_version zip that you just extracted) to a temp folder on the Composer system.
 4. Open Composer and go to **File > Import > General > Existing Projects into Workspace**.
 5. Choose **Select archive file** and then select the email strategy you copied from the Core VM.
Important: Select the project from the newly populated list, ensuring **Copy projects into workspace** is enabled, and click **Finish**.
 6. Verify that the local Tomcat server details are correct for your Composer installation:
 - Got to **Window > Preferences > Composer > Tomcat**.
 - Enter the Port, Login (admin), and Password (admin).
 - Check the Tomcat Location to confirm that it is on the local disk (for example, c:\Program Files (x86)\GCTI\Composer 8.1\tomcat).
 7. In Composer Package Explorer, expand the GenesysOne_Email package, right-click **Interaction Processes > Email ixnprocess**, and select **Publish to Configuration Server** (you might first need to connect to Configuration Server from the Composer menu bar).
 8. If you are localizing your environment:
 - In Project Explorer, open **GenesysOne_Email > Workflows > RouteToAgentWithAutoResponse.workflow**.
 - For each of the three *Create Email* blocks (SendOutOfOfficeHours, SendSpecialDay, SendOfficeHours):
 - Click the block and open its **Properties** view.
 - Click **Message Settings > Standard Response**.
 - Replace the English text (such as OfficeHours) with the localized text.
 - Save and generate the code.
 9. Right-click the package name and select **Properties**. Deploy the project.
 10. Create a war file:
 - Right-click the package name and select **Export > Composer > Java Composer Project as WAR file**.
 11. Copy the war file to \\g1-core-p\c\$\GCTI\apache-tomcat\webapps. The war file automatically extracts to a new **GenesysOne_Email** folder.
 12. Point the new scripts to the correct core server:
 - Open GA and go to **Provisioning > Routing/eServices > Orchestration**, which includes nine enhanced routing scripts.
 - Double-click **GenesysOne_Email.Email.Entered.Routing** and change the Orchestration URI to include the correct core server name; for example, http://g1-core-p:8080/GenesysOne_Email/IPD_Email_Entered.scxml.
 - Repeat for each of the other scripts.
-

-
13. If you are using Business Edition Premise version 8.1.100.20, restart Orchestration Server. If you are using a later version, you do not have to complete this step.

</multistep> Next: [Configure the routing applications](#) to meet your customer's business requirements.

Configuring the routing applications

Business Edition Premise routing configuration occurs at two levels:

- Initial configuration, which involves the setup of auto-attendant menus, business rules, and other configuration objects, requires a basic understanding of Genesys software, particularly Genesys Administrator, SIP Server, and, for email, eServices Knowledge Manager.
- Administrative configuration, such as setting open hours and switching among auto-attendant menu trees, is a subset of the initial configuration tasks and takes place entirely within Genesys Administrator Extension (GAX). It requires no advanced knowledge of Genesys software.

You can configure different values for a number of routing parameters, such as open hours and call priority. To handle different call flow and email scenarios, you use GAX to create parameter groups based on the default parameter group templates supplied in Business Edition Premise.

What the routing solution definitions create

Installation of the solution definitions (SPDs) automatically creates several objects. Configuration Server objects created by previous voice or email installations are not overwritten.

Voice

The Voice SPD creates these objects:

- Default personality
- Audio resources
- Parameters
- Parameter group templates
- Parameter groups

The Voice SPD also creates these samples (object name in parentheses):

- ACD Queues (*9000*)
- Action codes (*Admin Work, Locked, Lunch, Meeting, Pause, RONA, Training*)
- Agent groups (*AG_Voice_Sample, AG_Voice_Skill_Sample*)
- Agent Logins (*1000*)
- Business attributes
- DN Groups (*All_ACDQueues, All_RoutePoints, All_VirtualQueues*)
- Extensions (*8000*)
- Place Groups (*All_Places*)

-
- Places (*Place_SIP_8000*)
 - Route Point (selected during SPD installation)
 - Skill (*Skill_Sample*)
 - Virtual queue (*VQ_Default_sample*)

Email

The Email SPD creates these objects:

- Parameters
- Parameter group templates
- Parameter groups
- Transaction (Technical, Email Default)

The Email SPD creates these additional samples (object name in parentheses):

- Agent groups (*AG_Email_Sample*, *AG_Email_Overflow_Sample*, *Email Supervisors*)
- Business attributes (*Disposition Code (Attributes)*, *iWS_ToastUserData*, *iWS_UserData*)
- Capacity Rule (*GenesysOne_1Voice_1Email*)
- Persons (*AgentSample*, *SupervisorSample*)
- SIP Switch Virtual queue (*VQ_Default_email*)
- Transactions (*Category1OverrideIWS*, *Category2OverrideIWS*, *Category3OverrideIWS*, *Category4OverrideIWS*, *Category5OverrideIWS*)

Configuring voice routing

Initial configuration of the voice routing application depends on the needs of the customer. In many cases, the defaults supplied in the solution definition will be sufficient.

You can adjust voice routing parameters in either of two ways:

- To set new default values to be used in all new parameter groups that use the parameter, open Genesys Administrator Extension, navigate to **Operations > Parameters**, and adjust values as desired. Do not change Key Names.
- To set a new value that applies only to a specific parameter group, open Genesys Administrator Extension, navigate to **Operations > Parameter groups**, and adjust values as desired.

<multistep> Define auto-attendant menus=

You can use parameter groups to build multiple sets of up to three cascading auto-attendant menus. Keep in mind that you must record corresponding *Auto attendant menu announcements* for each set you build.

To create a single set of three cascading menus:

1. Plan your menu set, because it is most efficient to begin by creating the third tier and its touch-tone selections, then the second tier, then the first. Your plan will look something like the following (the parameter group type is in parentheses):

```
8000 (Inbound)
  1: Customer Service (Distribution)
    1: Wondrous Product Line (Distribution)
    2: Stupendous Product Line (Distribution)
  2: Sales (Distribution)
    1: North America (Distribution)
    2: EMEA (Distribution)
  3: Technical Support at routing point 6001 (Inbound)
    1: Printers (Distribution)
    2: Monitors (Distribution)
    3: Mice (Distribution)
```

A customer having difficulty with their mouse calls the number that corresponds to routing point 8000, then presses 3 for Technical Support and 3 again for Mice. In this example, you create 11 parameter groups: 2 Inbound and 9 Distribution.

2. Deploy the third-tier parameter groups (in the example, Wondrous Product Line, Mice, and the other 5). See below for help in setting the individual parameters.

3. Deploy the second-tier parameter groups. Add the third-tier groups as values for the Touch tone parameters. In the example, you deploy the Sales parameter group, then assign the North America group to Touch tone 1, and EMEA to Touch tone 2.

Important

When you create an Inbound parameter group, the name of the parameter group must be the same as the routing point that you want to handle these incoming calls (in the example, the Technical Support group must be named 6001).

4. Deploy a parameter group based on the Inbound parameter group template. Add the second-tier groups as values for the Touch tone parameters. In the example, you deploy the 8000 parameter group, then assign the Customer Service group to Touch tone 1, Sales to Touch tone 2, and 6001 to Touch tone 3. `|-| Upload audio resources=`

Note: To use Internet Explorer 10 to access Genesys Administrator Extension or Genesys Administrator, you must add the following to the IE Trusted Sites:

- `http://your UI VM domain`
- `about:blank`

In GAX, for each audio resource, upload the corresponding audio (WAV) files:

Resource name	Description
Announcement-Auto attendant menu	Played when the auto attendant is enabled
Announcement-Closed	Played when the service is closed
Announcement-Emergency	Played when <i>Emergency declared</i> is activated
Announcement-Greeting 1	Played when Greeting 1 is enabled
Announcement-Greeting 2	Played after Greeting 1 when Greeting 2 is enabled
Announcement-Special day	Played for a <i>Special day</i>
Music File	Music played while the caller is in the queue

`|-| Customize business attributes=`

Your customer might require different Disposition Codes, which are the codes agents can select to specify the outcome of an interaction. The default disposition codes are:

- Cross Sell
- Not Right Skill
- Terminated
- Transferred
- Up Sell

To modify these samples or create your own codes, in Genesys Administrator, navigate to **Provisioning > Routing > eServices > Business Attributes**, and open the existing Disposition Code Business Attribute.

Your customer might also require different reporting categories. The five default business parameters (Service, Segment, Product, Department, and Flow) represent reporting categories and are

completely customizable to your business model. You can assign different combinations of these parameters to each of your Inbound and Distribution parameter groups, to distinguish them in reporting and enable you to identify the unique properties of the parameter group. **[-] Set open hours and special days=**

The parameter **Open hours** sets the standard hours that your office is open during the week. Use the **Special day** parameter to set:

- The dates or days of the week on which your office is closed for the entire day.
- The dates or days of the week on which your office is closed for only part of the day. In these cases, you use the **Time Ranges** field in GAX to set the hours that you will be open on that date.

Specific dates set in **Open hours** are treated as special days. Hours set for the same date in **Special day** override those set in **Open hours**; for example, if **Open hours** specifies that you are open from 9AM to noon on December 31, and **Special day** sets the hours of 11AM-2PM for the same date, callers who call at 10AM on that date hear the Closed announcement. Similarly, in both parameters, date patterns higher in the list take precedence over those lower in the list.

5. Set targets and target timeouts.

Assign at least one target agent group for each parameter group. Change the timeout for each group as needed (default is 300 seconds, or 5 minutes). You should also assign a **Target overflow**, which serves as the "last resort" number to which a call is transferred when none of the other target agent groups answers within their timeout.

6. Tune priorities.

You can adjust the priority of calls using the four priority tuning options. Over time, unanswered calls receive higher and higher priority, ensuring that calls do not remain in the queue for excessive lengths of time.

- **Priority start** sets the initial call priority; you typically have little reason to change the default of 1.
- **Priority interval** sets the number of seconds between priority increments. If you set the priority interval to 60 seconds, for example, and the priority increment is 1, then after 5 minutes of wait time, the call would have a priority level of 6, pushing it ahead of calls with priority values of 1-5.
- **Priority Increment** sets the number to add to the priority value each time the priority interval is exceeded. As the priority levels are relative, a setting of 1 typically works.
- **Priority limit** sets the upper limit for priority increments; all calls at the maximum priority level receive equal treatment.

[-] Verify call routing=

To verify that Business Edition Premise is correctly receiving and routing calls, make a test call to an agent:

1. Ensure that you have:
 - A soft phone such as SJPhone
 - A sound-enabled Windows PC that can connect to the Core server
2. In GA, set the SIPS TServer option **enable-unknown-gateway** to true. **Important:** After completing the verification process, restore the value to false.

3. In GA, ensure that the user TestAgent belongs to the agent group AG_Voice_Sample.
4. In GAX, for parameter group **6000**, ensure that:
 - **Greetings activated** is True.
 - **Target 1** is AG_Voice_Sample.
 - **Open Hours** includes the current time (or the call will not route to the agent).
5. Install the Interaction Workspace (IWS) client by navigating to `http://UI VM name or IP address/InteractionWorkspace/publish.htm` and selecting **Install** or **Launch**.
6. Open IWS and log in using these credentials:
 - User name: TestAgent
 - Password: (none)
 - Place: Place_1000
 - Queue: 1004@SIP_Switch

Ensure that the agent can log in and set their status to ready.
7. Open a soft phone as any user. For **Domain**, enter the FQDN of the SIP Server. Uncheck **Register with domain**.
8. Dial 6000. If the installation was successful, the call appears in IWS.

| - | Verify call reporting= To verify reporting, run a report in Interactive Insights (GI2):

1. In a browser, log into GI2 at `http://UI VM name or IP address:9080/CmcApp/Logon.faces`
 - User: administrator
 - Password: G3n35y5
2. Go to **Folders > Interactive Insights > 8.1.1 > Agents**.
3. Run the report **Agent Group Interaction Handling Report**.
4. In the report list, click **Refresh** until status = success.
5. Open the report and click **Instance Time**. If the installation was successful, the call appears in the report.
6. In GA, reset the TServer option **enable-unknown-gateway** to false.

Operational parameters for voice routing

For each parameter group, enter a description in the Description field.

Audio and Announcements

For instructions on setting these parameters, see [Upload audio resources](#).

Parameter	Values (default in bold)	Mandatory?	Description
Announcement-Closed	Closed Annc , any valid audio resource	Yes	Audio Resource played when the service is closed
Announcement-Auto attendant menu	Auto-attendant Menu 1 , any valid audio resource	Yes	Audio Resource played when the auto attendant is enabled
Announcement-Emergency	Emergency Annc , any valid audio resource	Yes	Audio Resource played when <i>Emergency declared</i> is True
Announcement-Greeting 1	Greeting 1 , any valid audio resource	Yes	Audio Resource played when Greeting 1 is enabled
Announcement-Greeting 2	Greeting 2 , any valid audio resource	No	Audio Resource played after Greeting 1 when Greeting 2 is enabled
Announcement-Special day	Special Day Annc , any valid audio resource	Yes	Audio Resource played for a special day
Greetings activated	False , True	Yes	Activates the Greeting 1 and, if enabled, Greeting 2 announcements
Music File	Music In Queue , any valid audio resource	Yes	Audio Resource for music played while the caller is in the queue
Personality	Default Personality , other personality defined in GAX	Yes	The voice used in the announcements

Auto-attendant menus

For instructions on setting these parameters, see [Define auto-attendant menus](#).

Parameter	Values (default in bold)	Mandatory?	Description
Auto attendant menu activated	False , True	Yes	Activates an auto-attendant menu (such

Parameter	Values (default in bold)	Mandatory?	Description
			as Press 1 for Sales) for this parameter group
Touch tone 0	[none] , target parameter group	No	Distribution or Inbound parameter group selected when the caller selects 0
Touch tone 1	[none] , target parameter group	No	Distribution or Inbound parameter group selected when the caller selects 1
Touch tone 2	[none] , target parameter group	No	Distribution or Inbound parameter group selected when the caller selects 2
Touch tone 3	[none] , target parameter group	No	Distribution or Inbound parameter group selected when the caller selects 3
Touch tone 4	[none] , target parameter group	No	Distribution or Inbound parameter group selected when the caller selects 4
Touch tone 5	[none] , target parameter group	No	Distribution or Inbound parameter group selected when the caller selects 5
Touch tone 6	[none] , target parameter group	No	Distribution or Inbound parameter group selected when the caller selects 6
Touch tone 7	[none] , target parameter group	No	Distribution or Inbound parameter group selected when the caller selects 7
Touch tone 8	[none] , target parameter group	No	Distribution or Inbound parameter group selected when the caller selects 8
Touch tone 9	[none] , target parameter group	No	Distribution or Inbound parameter group selected when the caller selects 9

Business (reporting)

For instructions on setting these parameters, see [Customize business attributes](#).

Parameter	Values (default in bold)	Mandatory?	Description
Department	[none] , an item from the Department custom list for the parameter group	No	A business organization used as a category in reporting
Flow	[none] , an item from the Flow custom list for the parameter group	No	A business flow used as a category in reporting
Product	[none] , an item from the Product custom list for the parameter group	No	A product or product group used as a category for reporting
Segment	[none] , an item from the Segment custom list for the parameter group	No	A customer category used as a category for reporting
Service	[none] , an item from the Service custom list for the parameter group	No	Business categories typically used as the top level of the auto-attendant menu choices
Target virtual queue	[none] , a target virtual queue set in GA	No	A reporting entity set up in Genesys Administrator

Contact center status

For instructions on setting these parameters, see [Set open hours and special days](#).

Parameter	Values (default in bold)	Mandatory?	Description
Emergency declared	False , True	Yes	Activates the emergency announcement, overriding any other announcement
Open Hours	From Monday to Friday, 0800-2000, closed Saturday and Sunday , value set for parameter group	Yes	Sets the hours that you are open and accepting calls; to specify open hours on specific dates, you must place the date above all day-of-week entries
Special day	December 25, January 1 , any dates	No	A list of exceptions to the regular open hours, for a holiday or other reason.

Distribution

For instructions on setting these parameters, see [Set targets and target timeouts](#).

Parameter	Values (default in bold)	Mandatory?	Description
Default distribution parameter group	[none] , <i>parameter group</i>	No	The distribution parameter group that provides the default and overflow target for this parameter group; if you do not set this parameter, the call flow uses the originally defined list of targets and timeouts
Target 1	[none] , <i>agent group</i>	No	The first agent group to which the call is routed
Target 2	[none] , <i>agent group</i>	No	The second agent group to which the call is routed
Target 3	[none] , <i>agent group</i>	No	The third agent group to which the call is routed
Target 4	[none] , <i>agent group</i>	No	The fourth agent group to which the call is routed
Target 1 timeout	300 , <i>integer between 0 and 99999</i>	No	The timeout, in seconds, after which the call is routed to the next target agent group
Target 2 timeout	1 , <i>integer between 0 and 99999</i>	No	The timeout, in seconds, after which the call is routed to the next target agent group
Target 3 timeout	1 , <i>integer between 0 and 99999</i>	No	The timeout, in seconds, after which the call is routed to the next target agent group
Target 4 timeout	1 , <i>integer between 0 and 99999</i>	No	The timeout, in seconds, after which the call is routed to the next target agent group
Target overflow	[none] , <i>a standard telephone number, such as 8005551212</i>	No	The phone number to which a call is routed if the final Target timeout is exceeded or if no target agent group is specified. Important: you cannot use a routing point as this number.

Priority tuning

For instructions on setting these parameters, see [Tune priorities](#).

Parameter	Values (default in bold)	Mandatory?	Description
Priority Increment	0 , integer between 0 and 99999	No	Sets the number to add to the priority value each time the priority interval is exceeded
Priority Interval	0 , integer between 0 and 99999	No	The time interval (in seconds) between priority increments
Priority Limit	0 , integer between 0 and 99999	No	Sets the upper limit for priority increments; all calls at the maximum priority level receive equal treatment
Priority Start	1 , integer between 1 and 99999	Yes	The initial priority assigned to each incoming call

Configuring email routing

Initial configuration of the email routing application depends on the needs of the customer. In many cases, the defaults supplied in the solution definition will be sufficient.

You can adjust email routing parameters in either of two ways:

- To set new default values to be used in all new parameter groups that use the parameter, open Genesys Administrator Extension, navigate to **Operations > Parameters**, and adjust values as desired. Do not change Key Names.
- To set a new value that applies only to a specific parameter group, open Genesys Administrator Extension, navigate to **Operations > Parameter groups**, and adjust values as desired.

<multistep> Configure screening rules= You can use the eServices Knowledge Manager application (on the Aux VM) to customize the screening rules used to route email to any of the five Category parameter groups.

Content screening explains how screening works in Business Edition Premise.

"Screening Rules" in the **eServices 8.1 User's Guide** explains how to use the Screening Rule Editor and details how the rules work. |**Configure email acknowledgements**= You can also use the eServices Knowledge Manager application to customize the text of the acknowledgement emails: **Email acknowledgement body open hours**, **Email acknowledgement body closed hours**, and **Email acknowledgement body special days**, as well as the opening (salutation), closing, and time zone.

"Using Categories and Standard Responses" in the **eServices 8.1 User's Guide** explains how to edit the acknowledgement content. |**Configure distribution**= After you customize the screening rules, you can adjust their associated parameter groups to distribute emails to the correct targets. If you added the term "sales" to the Category 3 screening rule, for example, you can route emails with "sales" in their subject lines to a particular target agent group by setting the Category 3 parameter group **Email target** value to the Sales agent group.

You can also enable or disable supervisor review, and change the percentage of emails subject to review. |**Set open hours and special days**= The parameter **Email open hours** sets the standard hours that your office is open during the week. Use the **Email special day** parameter to set:

- The dates or days of the week on which your office is closed for the entire day.
- The dates or days of the week on which your office is closed for only part of the day. In these cases, you use the **Time Ranges** field in GAX to set the hours that you will be open on that date.

Specific dates set in **Email open hours** are treated as special days. Hours set for the same date or day of the week in **Email special day** override those set in **Email open hours**; for example, if **Email open hours** specifies that you are open from 9AM to noon on December 31, and **Email special day** sets the hours of 11AM-2PM for the same date, people who send an email at 10AM on that date receive the special day acknowledgement.

Similarly, in both parameters, date patterns higher in the list take precedence over those lower in the list. |**Tune priorities**= You can adjust the priority of emails using the two priority tuning parameters:

-
- **Email priority** sets the initial email priority; you typically have little reason to change the default of 100.
 - **Email overflow priority** sets the priority of emails that exceed the **Email target timeout**. The default value is also 100, which means that emails that have already passed the overflow timeout will be re-queued based solely on their age, ensuring that the oldest emails will appear in the queue first.

|–| Send a test email= To verify that Business Edition Premise is correctly receiving and routing emails, send a test email:

1. Install an email client and ensure that it connects to your email server.
2. Send an email to the address specified during the eServices SPD deployment.
3. Ensure that you have installed an IWS client (you did this when you were **making a test call** during the voice routing configuration).
4. If Business Edition Premise is successfully installed, an IWS interaction window containing the email appears when the email arrives.

</multistep>

Operational parameters for email routing

Acknowledgements

For instructions on setting these parameters, see [Configure email acknowledgements](#).

Parameter	Values (default in bold)	Mandatory?	Description
Email acknowledgement	True , False	Yes	Sends customer an acknowledgement email, content depending on whether you are open, closed, or on a special day
Email acknowledgement body open hours	Thank you for your email. We will get back to you as soon as possible. , <i>text string entered in Value field</i>	Yes	The body text used for acknowledgements sent during regular hours
Email acknowledgement body closed hours	Thank you for your email. We are currently closed and will get back to you as soon as possible. Our office hours are: , <i>text string entered in Value field</i>	Yes	The body text used for acknowledgements sent during closed hours
Email acknowledgement body special days	Thank you for your email. We are currently closed and will get back to you as soon as possible. Our office reopens on date , <i>text string entered in Value field</i>	Yes	The body text used for acknowledgements sent during special days
Email acknowledgement opening	Dear Customer name , <i>text string entered in Value field</i>	Yes	The greeting to the customer at the beginning of the acknowledgement
Email acknowledgement closing	Regards , <i>text string entered in Value field</i>	Yes	The closing term to the customer at the end of the acknowledgement
Email acknowledgement time zone	[none] , <i>free-form text such as Central Time or GMT</i>	No	The time zone text that you want to include in your email acknowledgements.
Email from	[none] , <i>email address</i>	No	The email address (typically DoNotReply)

Parameter	Values (default in bold)	Mandatory?	Description
			used in sending email responses to customers

Contact center status

For instructions on setting these parameters, see [Set open hours and special days](#).

Parameter	Values (default in bold)	Mandatory?	Description
Email open hours	From Monday to Friday, 0800-2000, closed Saturday and Sunday , any value set in the Value > Date Pattern field	Yes	Sets the hours that you are open and accepting emails; to specify open hours on specific dates, you must place the date above all day-of-week entries
Email special day	December 25, January 1 , any value set in the Value > Date Pattern field	No	A list of exceptions to the regular open hours, for a holiday or other reason.

Distribution

For instructions on setting these parameters, see [Configure distribution](#).

Parameter	Values (default in bold)	Mandatory?	Description
Email screening	True , False	Yes	Enables email screening rules
Email target	[none] , agent group	Yes	The agent group that first receives all emails
Email overflow target	[none] , agent group	No	The agent group that receives all emails that exceed the overflow target timeout
Email target timeout	3600 , integer between 1 and 99999	No	The length of time (in seconds) that an email can go unattended before being passed to the overflow agent group
Email overflow target timeout	86400 (24 hours), integer between 1 and 99999	No	The length of time (in seconds) that an email can go unattended before being passed to the first available agent group (either target or overflow)

Parameter	Values (default in bold)	Mandatory?	Description
Email supervisor review	False , True	Yes	Enables supervisor review.
Email supervisor review percentage	100 , integer between 0 and 100	Yes	The percentage of emails routed to supervisors for review
Email supervisor agent group	[none] , agent group	No	The supervisor agent group that receives the emails when supervisor review is enabled
Email default virtual queue	VQ_Default_email , a target virtual queue set in GA	Yes	The default virtual queue to which all emails are routed, for reporting

Priority tuning

For instructions on setting these parameters, see [Tune priorities](#).

Parameter	Values (default in bold)	Mandatory?	Description
Email priority	100 , integer between 1 and 99999	Yes	The initial priority assigned to each incoming email
Email overflow priority	100 , integer between 1 and 99999	Yes	The priority assigned to all emails that exceed the overflow target timeout

Requesting licenses

To request Genesys and VMware licenses for Business Edition Premise, complete the following steps:

1. Prepare an email request containing the following details:
 - Your software order number or purchase order number.
 - The Core VM NIC MAC address (this is for the Genesys software license). If you do not know the MAC address, and your server was provided by Genesys, you can find it on the label of the box in which your server was shipped, or alternatively, on the license card of the system. Otherwise, contact your Genesys Partner.
 - For existing deployments, include a copy of your existing license file.
 - For non-revenue orders, you should request licenses only if you are upgrading to a major version release (for example, if you are upgrading version 7.x to 8.x).
2. Send the email request to the appropriate Genesys contact for your geographical region:
 - [Americas / APAC](#)
 - [EMEA](#)
 - [Japan](#)

The response time for license requests is typically 2-3 days.

For more information about licenses, refer to the [Genesys Licensing Guide](#).