Business Edition Premise Provider's Guide

Part I: Off-site installation

4/9/2026

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Part I: Off-site installation

These steps describe how to prepare the server for delivery to the premise site. You must complete these steps in order, and before the server is taken to the premise site for the next phase of BEP installation.

Procure the required hardware

Requirement	Minimum configuration
Server type	Dell PowerEdge R430
Processor	Intel Xeon E5-2630 (2.40 GHz, 20 M Cache)
Additional processor	Intel Xeon E5-2630 (2.40 GHz, 20 M Cache)
Memory (RAM)	48 GB
Controller	PERC H730 1 GB RAID Controller
Hard drives	7x300GB 15 K SAS disks: 6 disks for RAID5 + 1 hot spare; 2.5 inch drive chassis
Guest Operating System	Microsoft Windows 2012 Server R2 Standard
Hypervisor Operating System	ESXi 6.0

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 ESXi 6.0 server.

Set up the server hardware and iDRAC

WATCH: Business Edition Premise: Setting up the iDRAC Interface:

Link to video

Perform the initial hardware setup and configure the iDRAC management board.

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`

Obtain the required licenses

Obtain the following licenses:

- One embedded Microsoft SQL Server 2012 R2 64-bit license, required for internal access of server components.
  Important: This license to be applied on the Premise site.
- Two embedded Microsoft Windows Server 2012 R2 64-bit licenses.
  Important: These licenses to be applied on the Premise site.
- Two VMware vSphere Standard Server ESXi 6.0 license for 2 physical CPUs (unlimited cores per CPU).
- Alternatively, you can purchase the BEP Operations pack from Genesys, which contains appropriate licenses from Microsoft without the need for client access licenses.
- Genesys software license for 50, 100, or 300 agents.
  Important: The MAC address information required for this license is obtained from the VM during server configuration.

Configure the server

These steps describe how to configure the server storage as a RAID-5 disk group containing two virtual disks. Virtual Disk 1 is used for the installation of the ESXi operating system and Virtual Disk 2 is used for the virtual machine VMFS5 datastore.

WATCH: How to configure the server storage (for 100 to 300 agents) as a RAID-5 disk group containing two virtual disks:

Link to video

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

1. Login to iDRAC and launch the Virtual Console, and then power on the server.
2. Configure disk group 0 and Virtual Disk 1:
   a. Press **<CTRL>** + **<R>** during POST to enter the RAID Configuration Utility.
   b. Configure the server as RAID-5 with a single hot spare drive. Under **Physical Disks**, select Disk IDs *:00 through *:05.
   c. Under **Basic Settings**, change the **VD Size** to **10 GB** and type `ESXi` as the **VD Name**.
   d. Enable the **Advanced Settings** option and select **Initialize** (reply OK to the warning) and **Configure Hot Spare**.
   e. In the **Dedicated Hotspare for Disk Group 0** window, select the first Disk ID and select **OK**.
3. Configure virtual disk two:
   - From the **Virtual Disk Management** screen, select **Disk Group** and then **Add New VD**.
   - For the **VD Name**, type `VM Storage`.
   - Enable **Advanced Settings** and confirm that the Read Policy is **Adaptive Read-Ahead** and the

Write Policy is **Write Back**.

- Select **Initialize** (reply OK to the warning).
- Exit and reboot the server.

4. Modify the boot sequence for the server:
   - Press **F2** during POST to enter the system BIOS.
   - From the BIOS menu, navigate to **System Setup Main Menu** > **System BIOS** > **Boot Settings** > **Bios Boot Settings** > **Hard-Disk Drive Sequence**.
   - Move the Integrated RAID Controller (H710P or H730) to the top of the list.
   - Exit and reboot the server.

Install the VMware vSphere ESXi Server and Client

WATCH: ESXi Server installation:

Link to video

1. Install VMware vSphere 6.0 Standard ESXi Server on the 20 GB Virtual Disk 1 (configured in the previous step), using the license you procured. Give the server a unique name such as bep_*location*.
   For more information about VMware vSphere 6.0 Standard ESXi Server, see the VMware vSphere ESXi and vCenter Server 6.0 Documentation (opens in a new window or tab).
   - After installing, navigate to **Configure Management Network** > **IPv6 Configuration** and disable IPv6 support.
2. If you are installing the VM 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.
3. Install the VMware vSphere 6.0 Client on any Windows workstation that has network connectivity to the ESXi Server:
   IMPORTANT: The ESXi server must be powered on.
   - Open a browser and enter the IP address assigned to the ESXi server.
   - On the **VMware ESXi Welcome** page, click the download link for the VMware vSphere 6.0 Client and follow the prompts to install. For more information, see the VMware vSphere ESXi and vCenter Server 6.0 Documentation (opens in a new window or tab).

Configure the VM storage requirements

WATCH: Virtual storage configuration:

Link to video

1. Log in to the vSphere Client workstation as a user with ESXi administrator rights and select the **Configuration** tab.
2. In the Hardware section, click **Storage**, and then select **Add Storage**.
3. Accept the default settings by clicking **Next** for each configuration screen, and give the datastore a name (for example, VM Storage).
4. For the Capacity, accept the default selection of **Maximum available space**.
5. Click **Finish**.

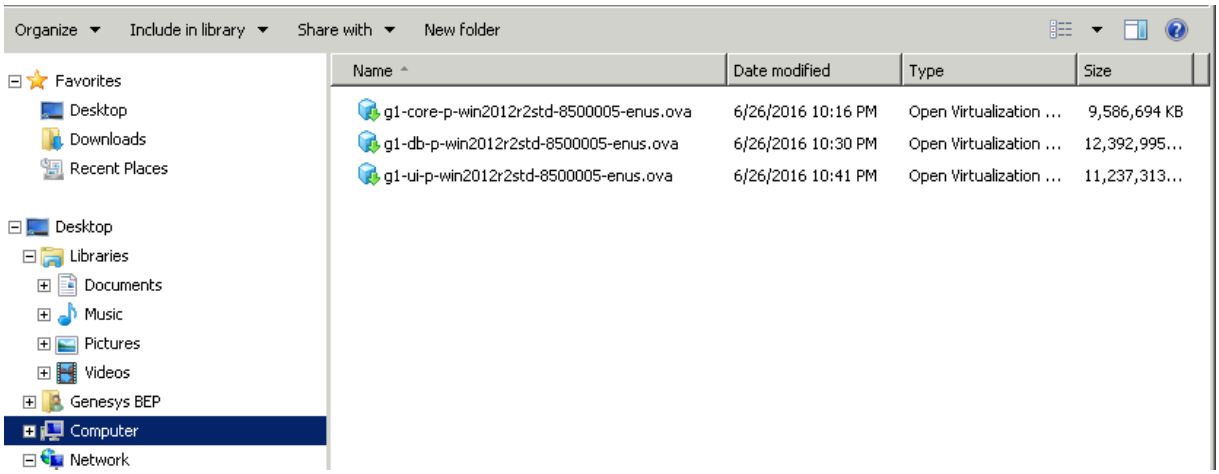
Deploy the VM platform

Obtain the OVA VM template and deploy the VMs.

1. Obtain the OVA VM template:
   - Log into the vSphere Client as a user with ESXi administrator rights.
   - Select **File** > **Deploy OVF Template**
   - Save the BEP OVA VM template to a network drive on the same subnet as the ESXi Server or to a Genesys-supplied hard drive.
2. Launch the file and deploy the VMs:
   - The VM names must be in the following format:

     VM role-platform-product version-language code.

     Example: `g1-core-p-win2012r2std-8500005-enus.ova`



> **Important**
> Do not change the VM naming format!

- Genesys recommends that you keep the default settings during deployment.

> **Important**
> When selecting storage for the OVA file, a minimum of 800 GB of available storage is required.

Enable VM restoration

To enable VM restoration, take a snapshot of a VM in its current state.

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 6.0 Documentation (opens in a new window or tab).

Confirm that the VM starts

Power on the VM and confirm that it 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 Premise 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

These steps confirm that the off-site portion of the installation is complete and that the server is ready for delivery to the Premise site.

1. Log in to iDRAC and confirm the following:
   - The server configuration is RAID-5.
   - The storage controller card model is H730 for R430 models (or H710P for all other models).
   - Disk sizes are 600 GB, 15K, SAS.
2. Connect to the ESXi server with a vSphere client and confirm the following:
   - The VM is deployed and able to start.
   - The ESXi server has all CPUs (>= 16 CPUs) and RAM (48 GB).
   - The VM is present, with a snapshot taken.
   - You can locate the MAC address for the VM, as this is needed when ordering appropriate Genesys licenses.
   - Ensure that you have adjusted the memory and CPU values of the VM as required for your deployment.