GENESYS™

Business Edition Premise Provider's Guide

Part II: On-site installation

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These steps describe how to finalize the server installation and configuration at the premise site.

> ## Important
> Perform these steps only after the off-site portion of the installation is complete and the server is delivered to the premise site.

The steps are divided into several subsections and must be completed in the order described.

Before you begin

Confirm that you have the 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.

- One Windows Server 2012 license key for activating Windows when starting the VMs.
- One Genesys software license for the required number of agents.
- One Business Objects Enterprise (BOE) version 4.1.x license key.
- One Microsoft SQL Server 2012 R2 64-bit license.

Provision the network

Provision the network to include:

- Three 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 a hostname for each VM for entry into a DNS server
- One IP address within a management control subnet for Dell iDRAC configuration, to enable hardware alarming using 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 server.

Hardware configuration

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.

1. 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.

2. Navigate to **Alerts > Alerts Filter**.

   - Ensure that *only* **System Health**, **Storage**, **Warning**, and **Critical** are checked.

   - Uncheck the other five items.

   - Click **Apply**.

3. Under **Alerts and Remote System Log Configuration**, check the **Email** box in the heading for *each* of the 8 pages.

4. 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**.

5. 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**.

6. Under **Destination E-mail Addresses**:

   - Click **Send** to send an email alert to each of the configured accounts.

   - Verify that each account received the test email.

7. Return to the **Alerts** tab. Enable alerts and click **Apply**.

Configure Time Zone and Network Time Protocol (NTP)

1. Navigate to **Overview** > **iDRAC Settings** > **Properties** > **Settings**. The Time Zone and NTP page appears.

2. From the Time Zone drop-down menu, select the required time zone and click **Apply**.

3. Enable NTP, enter the NTP server addresses, and click **Apply**.

DHCP and DNS server assignment

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 do the following:

   - 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 with the one you copied.

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.

5. Open a DOS prompt and confirm the DNS association by doing a Forward and Reverse nslookup, as follows:

   - `nslookup` *<IP_address>*

   - `nslookup` *<hostname>*

Update DHCP and DNS servers for the 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 VM 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 name of the VM server and the IP address assigned from the customer pool of addresses and given out by their DHCP server.

5. Open a DOS prompt and confirm the DNS association by doing a Forward and Reverse nslookup, as follows:

   - `nslookup` *<IP_address>*

   - `nslookup` *<hostname>*

Configure NTP on the ESXi server

Configure an NTP (network time) daemon to synchronize the VM.

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:

    *   Under **General**, select **Start and stop with host**.

    *   Click **OK**.

> ### Important
> You must be back in the **Time Configuration** screen to do the next step.

    *   In the **Time Configuration** window, click **Options**.

    *   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. Select **Options** and verify that the General settings are as follows:

    *   Status = **Running**.

    *   Startup Policy = **Start and Stop with Host**.

    *   The **Start** button appears in the Service Commands section.

6. Click **OK** to close the **NTP Daemon Options** and **Time Configuration** windows.

Configure the VMs

These sections describe how to set up and configure the VMs, configure the BOE tuneup script, and apply the Microsoft and Genesys application licenses and configuration changes.

> ### Important
> The VMs *must* be configured in the order shown, starting with the **core**, then the **db**, and finally, the **ui** VM.

Configure the core VM

Important: This VM must be configured first.

1. Power on the core VM and open Console.

2. In Windows setup, enter the locale and product key, accept the license terms, and assign a password for the Administrator account.

3. Log in as Administrator. The Windows desktop loads and the tune-up script automatically runs.

> ### Tip
>
> If you enter incorrect information during the tune-up script configuration, simply redeploy the VM and begin the tuneup script configuration again. If you made a snapshot of the VM prior to entering any data for the tune-up configuration script, you can revert to that snapshot.

When prompted:

For the **Host** naming scheme:

- Select 1 to use default host names (`g1-core-p`, `g1-db-p`, `g1-ui-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**, or **db**). Use this option if you need to conform to a customer naming convention.

> ### Important
>
> Each host name can contain no more than 15 characters.

For the **Domain** configuration:

> **Tip**
>
> 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 tune-up 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.

- When prompted, specify the `gateway-ip-address` and `gateway-port` as required for your VoIP media gateway (source and destination of VoIP traffic) configuration.
- Reply yes to rename and reboot the VM.

> **Important**
>
> Ensure that the VM fully restarts before continuing to the next step, but do not log on.

Configure the db VM

Next, power on and configure the db VM.

1. Power on the db VM and open Console.

> **Important**
>
> For localized versions, you must first select a language before proceeding with Windows setup.

2. In Windows setup, set the **locale**, enter the **product key**, accept the **license terms**, and assign a password for the Administrator account.
3. Log in as Administrator. The Windows desktop loads and the tune-up script automatically runs. When prompted:

   - Enter the Primary Core Host **IP address** (do not use the host name).

4. The time zone is configured as part of the tune-up script (this only applies to the db VM).

   - 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.)

5. Enter **Yes** to rename and restart the VM.

> **Important**
>
> Ensure that the VM fully restarts before continuing.

Run the core VM tune-up script

This is the second phase of the core VM tune-up script.

1. Log into the core VM. The core VM tune-up script starts automatically.

2. When prompted, confirm that the db VM was restarted.

3. When the script finishes, press any key to continue.

Configure the ui VM

Configure this VM last, after the core and db VMs are configured.

1. Power on the ui VM and open Console.

> ### Important
> For localized versions, you must first select a language before proceeding with Windows setup.

2. In Windows setup, set the **locale**, enter the **product key**, accept the **license terms**, and assign a password for the Administrator account.

3. Log in as Administrator. The Windows desktop loads and the tune-up script automatically runs. When prompted:

   - Enter the Primary Core Host **IP address**.

   - Enter **Yes** to rename and restart the VM. Ensure that the ui VM fully restarts before you proceed.

Configure the BOE tune-up script

The `tuneup_boe.bat` script runs automatically during ui VM startup.

1. Enter the BOE license code.

2. Wait for the BOE tune-up script to finish and close.

> ### Important
> It is normal to experience a delay during this step as the script can take 30 minutes or more to complete. The progress bar will automatically refresh itself every 20 seconds.

3. Restart the VM.

Apply licenses and configuration changes

Apply the Microsoft and Genesys application licenses and configuration changes.

> **Important**
>
> Make sure the BOE configuration script has already run before completing this step.

1. To change the Time Zones on all VMs, go to **Server Manager** > **Local Server** > **Time Zone**, and 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 on the g1-core VM.

> **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 2012 license key at the completion of the BEP installation.

3. Next, on the db VM host, add the Microsoft SQL Server 2012 R2 64-bit license:

   - Launch **SQL Server Installation Center (64-bit)** and 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**.

   WATCH: A quick video showing the Microsoft SQL Server 2012 license application.

   Link to video

4. If your environment uses a domain, you can add it by going to **Server Manager** > **Local Server** > **Computer Name**. (Requires VM restart.)

5. Restart the VMs.

Verify the status of Genesys services

1. Enter `Services` in the **Search programs and files** dialog box.

2. Select **Services** and locate groups of services with names starting with **Genesys** in the list of local services.

3. Confirm that all Genesys services have a status of *Started* with a startup type of *Automatic*, with the following exceptions:

   - Genesys Outbound Contact Server (g1-core) [OCS] (not started, Manual)
   - GDA (not started, Disabled)

Configure Genesys Interactive Insights

Important: Don't skip this step. You must configure Genesys Interactive Insights (GI2) on the host where the SAP Business Intelligence reporting platform is installed.

WATCH: A short demonstration of GI2 configuration.

Link to video

1. Go to the Windows Apps screen. In the SAP Business Intelligence section, select the **Information Design Tool**.

2. In the Repository Resources section, click (**+**) to insert a new session. Use the following details:

   - System=[hostname where SAP Business Intelligence is installed]

   - User Name: Administrator

   - Password: G3n35y5

3. Expand **Repository Resources**, then expand **Connections** and double-click **GI2_GIM_DB**.

4. Select **Change Driver**.

5. Go to **Microsoft** > **MS SQL Server 2012**, and select **JDBC Drivers**.

6. Click **OK**.

7. Fill out the **Edit Relational Connection** details as follows:

   - Authentication Mode: Use specified user name and password

   - User Name: genesys_gim

   - Password: Genesy$_0_gim

   - Server: [*MS SQL server hostname*]:1433

   - Database: gim_etl

8. Click **Test Connection**, and then save your changes.

Backup the VMs

Genesys recommends that you backup the VMs by exporting them to an external location or device. For each VM, do the following:

1. Open the vSphere Client.

2. Power off the VM.

3. In the vSphere client, highlight the target VM and select **File** > **Export** > **Export OVF Template**.

4. For the file format, select Single File (OVA).

5. Specify the output file name and location.

6. Export the file.