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Genesys Intelligent Automation Deployment Guide

Pre-Installation Checklist

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Pre-Installation Checklist

This page describes tasks that you must complete before installing Genesys Intelligent Automation. It is recommended you print this page (generate a PDF) and have the installer sign off on each requirement.

Important

Ensure that your environment meets the requirements for Intelligent Automation. See the [SOE requirements for Intelligent Automation](#) for information.

Note that after you install Intelligent Automation, there is **additional configuration** that must be done before you can put Intelligent Automation into production.

Installation requirements

On-site installation requirements

Task	Completed and tested by
A dedicated desktop or laptop computer has been made available for the Intelligent Automation consultant to perform the installation. This computer must be able to access all servers required.	

Remote installation requirements

Task	Completed and tested by
Remote access has been set up and tested, and details have been forwarded to the Intelligent Automation consultant.	
The Intelligent Automation consultant has been provided with third-party software (for example, a VPN client) required to connect remotely.	

Solution requirements

This part of the checklist applies to the components and functionalities required to install, configure,

and start the appropriate Solution ([GVP](#) or [PureConnect](#)) for installing Intelligent Automation.

GVP requirements

Task	Completed and tested by
<p>The GVP, ASR and TTS versions have been made available, as per the Sizing Recommendations and Software Recommendations page.</p>	
<p>If TTS or ASR is required, it has been installed, configured, and fully tested.</p>	
<p>Genesys GVP has been installed and configured, and has successfully handled test calls (including ASR and TTS, if required) to confirm it is fully functional.</p>	
<p>A Genesys resource has been made available to configure GVP to route calls to Intelligent Automation after the installation to complete basic testing.</p> <p>You must enter one of the following start URLs into the routing strategy or IVR profile to configure the mode Genesys Intelligent Automation will use for processing interactions.</p> <p>Example: <code>http://<host>:<port>/fish-vui/start/GenesysGVP8.jsp?testsiteid=3&istestcall=false</code></p> <div data-bbox="175 1056 727 1205" style="border: 1px solid #ccc; padding: 5px; margin: 10px 0;"> <p>Tip</p> <p>You can view the <code>siteid</code> value for an application by going to the Applications view and selecting Advanced Details to display the Site ID beside each application.</p> </div> <ul style="list-style-type: none"> • GenesysGVP8_NoCTI.jsp — GVP 8 without CTI functionality (ASR or TTS is not available). • GenesysGVP8_NR11_Vocalizer7.jsp — GVP 8 with Nuance Recognizer 11 and Vocalizer 7 for ASR and TTS. • GenesysGVP8_NR10_Vocalizer6.jsp — GVP 8 with Nuance Recognizer 10 and Vocalizer 6 for ASR and TTS. • GenesysGVP8_NR9_Vocalizer5.jsp — GVP 8 with Nuance Recognizer 9 and Vocalizer 5 for ASR and TTS. • GenesysGVP8.jsp — GVP 8 only (ASR or TTS is not available). • GVP8Legacy_Vocalizer5_CTI.jsp — GVP 8 running in legacy mode with CTI and Vocalizer 5 TTS. • GVP8Legacy_Vocalizer5.jsp — GVP 8 running 	

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Task	Completed and tested by
<p>in legacy mode with Vocalizer 5 TTS.</p> <ul style="list-style-type: none"> • Interactive_NR9_Vocalizer5.jsp — PureConnect with Nuance Recognizer 9 and Vocalizer 5 for ASR and TTS. • GenesysGVP8_GoogleSR_Vocalizer6.jsp — GVP 8 and 9 for Speech Transcription. • Interactive_GoogleSR_Vocalizer5.jsp — PureConnect 2018R4 - 2019R2 for Speech Transcription. • GenesysGVP8Plus_GoogleSR_GoogleSS.jsp — GVP 8+ for Speech Transcription + Google Cloud TTS (GenesysGVP8_GoogleSR_GoogleSS.jsp is for backward compatibility). • GenesysGVP8Plus_GoogleSR_Vocalizer7.jsp - GVP 8+ for Speech Transcription (GenesysGVP8_GoogleSR_Vocalizer7.jsp is for backward compatibility). • Interactive_GoogleSR_GoogleSS.jsp — PureConnect 2018R4 - 2019R2 for Speech Transcription + Google Cloud TTS • Interactive_GoogleSR_Vocalizer5_JSONEncoding.jsp — PureConnect 2019R3 and above for Speech Transcription • Interactive_GoogleSR_GoogleSS_JSONEncoding.jsp — PureConnect 2019R3 and above for Speech Transcription + Google Cloud TTS 	
<p>A Genesys resource has been made available to troubleshoot any GVP issues encountered.</p>	
<p>Genesys routing and required attached data (if applicable) has been configured to support the requirements.</p>	
<p>Externally accessible DID test numbers have been configured and made available to allow the Intelligent Automation consultant to dial into the environment.</p>	
<p>If using multimodal functionality, Genesys ORS has been installed and configured.</p>	

PureConnect requirements

Task	Completed and tested by
<p>Genesys PureConnect has been installed and configured, and has successfully handled test calls</p>	

Task	Completed and tested by
to confirm it is fully functional.	
A Genesys resource has been made available to configure PureConnect to route calls to Intelligent Automation after the installation for basic testing to be completed.	
A Genesys resource has been made available to troubleshoot any PureConnect issues encountered.	
Genesys routing and required attached data (if applicable) has been configured to support the requirements.	
An Intelligent Automation consultant has been made available to dial in to the environment.	
<p>The fetchaudio setting is not configured by default for PureConnect and it should be configured before using Intelligent Automation.</p> <div data-bbox="175 785 727 1029" style="border: 1px solid #ccc; padding: 5px; background-color: #fff9e6;"> <p>Important</p> <p>To configure the setting in Intelligent Automation, add a new setting, Resources.PlatformFetchAudioURL (under <i>Administration > Default Server Settings</i>) and set a valid URL for the audio file as its value.</p> <p>PureConnect does not have a default value for fetchaudio. You must configure the value in PureConnect instead of Intelligent Automation as the IA setting applies to all organisations in that environment whereas PureConnect is a single-tenant environment.</p> </div>	

Database Requirements

Complete the checklists corresponding to the DBMS you are using in your Intelligent Automation database layer.

General Database Requirements

This section of the checklist must be completed regardless of the particular databases that you will use in your Intelligent Automation installation. For requirements specific to each type of database, refer to the following:

- SQL Server—[Microsoft SQL Server requirements](#)
- Oracle—[Oracle requirements](#)

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Task	Completed and tested by
Two databases (fish and fish_reports , for example) have been created and initialized using the steps provided in Set up databases .	

Microsoft SQL Server requirements

This section of the checklist is required only if you want to use Microsoft SQL Server for one or both databases.

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Task	Completed and tested by
A Microsoft SQL Server R2 database environment is ready and has been tested for the Intelligent Automation consultant to access and install Intelligent Automation.	
Microsoft SQL Server has been configured and tested to allow TCP/IP connections and to allow non-Windows users (SQL Server authentication).	
Microsoft SQL Server Management Studio has been installed on at least one Intelligent Automation server per environment (for example, one for the test environment and one for the production environment).	
An SQL Server authenticated user account has been created, and this account also has ownership of the SQL Server databases. You can confirm these settings by connecting to the database using SQL Server Management Studio. In the left panel, navigate to Security > Logins . Right-click the appropriate user and select Properties > User Mapping . Ensure db_owner is enabled for both databases.	
To accommodate future migration of the reports schema, Genesys recommends that the transaction log file(s) are configured to be at least as big as the data file(s), and that both are set to automatically grow as needed. The size of these files should be monitored periodically and regular backups scheduled to better manage the transaction logs.	

Oracle requirements

This section of the checklist is only required if you want to use Oracle for one or both databases.

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Task	Completed and tested by
The Oracle database environment is ready and has been tested for the Intelligent Automation consultant to access and install Intelligent Automation.	
Oracle SQL Developer has been installed on at least one Intelligent Automation server per environment (for example, one for the test environment and one for the production environment).	
A SYS user has executed the following command in Oracle: <code>ALTER SYSTEM SET open_cursors = 600 scope=both;</code>	

Server requirements

Task	Completed and tested by
The servers have been built as per the Hardware and Software Specifications page.	
All server details—such as hostnames and IP addresses for all relevant servers, including GVP, Intelligent Automation, and the database environment—have been provided to the Intelligent Automation consultant.	
Login information has been provided to the Intelligent Automation consultant for all relevant computers and servers, including Active Directory (if used) and database servers.	
Administrative privileges on the Intelligent Automation servers have been configured to allow the Intelligent Automation consultant to install, test, and troubleshoot.	

Project-specific requirements

Task	Completed and tested by
Test data for the Intelligent Automation consultant to test the IVR application after installation has been provided, including (if applicable) valid card payment details for testing of the payment gateway and all other web services.	
All third-party components required as part of the solution have been installed, configured, tested, and available to integrate before the installation of Intelligent Automation.	
Custom grammars, if used in the deployment, are available and recompiled as needed by the ASR/TTS engine.	
If using multimodal communication , Orchestration Server 8.1.4 or higher is installed.	

Firewall requirements

The main firewall rules that are required for Intelligent Automation to function are defined and set up, as given in the following table. Some customers might have additional requirements. In addition:

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- The port numbers referenced in the table below reflect common configuration as documented elsewhere in this guide. You must update these port numbers if your environment uses non-default port numbers.
- This table does not include standard firewall requests for scenarios such as remote desktop; it is assumed that the customer has already enabled these rules.

Rule	Ports	Completed and Tested by
<p>Communication from the customer site to the Intelligent Automation FTP server for downloading installation files. Server details are:</p> <ul style="list-style-type: none"> • Host Name: ftp.speechstorm.com • Port Number: 22 • File Protocol: Secure FTP (SFTP) • Username: <i>Will be supplied by Genesys</i> • Password: <i>Will be supplied by Genesys</i> <div style="border: 1px solid orange; padding: 5px; margin-top: 10px;"> <p>Important Access to the FTP site does not need to originate from the Intelligent Automation servers, but you must have a method of transferring files from the FTP site onto the Intelligent Automation servers.</p> </div>	22 for Secure FTP (SFTP)	
Inter-Communication between all Intelligent Automation servers	<ul style="list-style-type: none"> • 80, 8080-8089 for HTTP traffic • 443, 8443-8449 for HTTPS traffic 	
Communication between Genesys environment and all Intelligent Automation VUI servers	<ul style="list-style-type: none"> • 80, 8080-8089 for HTTP traffic • 443, 8443-8449 for HTTPS traffic 	
Communication between ASR and TTS environment and Intelligent Automation servers	<ul style="list-style-type: none"> • 80, 8080-8089 for HTTP traffic • 443, 8443-8449 for HTTPS traffic 	
Communication between database environment and Intelligent Automation servers	The SQL Server Port: Usually 1433, but to be confirmed by the customer.	

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Rule	Ports	Completed and Tested by
Communication between all Intelligent Automation servers and customer integration/ backend systems	Ports to be confirmed by the customer.	
Communication between all Intelligent Automation servers and customer SMTP server (see Configuring Genesys Intelligent Automation for more details).	Ports to be confirmed by the customer.	
Communication between all Intelligent Automation servers and customer SNMP Manager (see Configuring Genesys Intelligent Automation for more details). Important This is optional and only required if you want to use the trap-sending functionality provided by Intelligent Automation.	Ports to be confirmed by the customer.	
Communication between all Intelligent Automation servers and customer SYSLOG/ Centralized Logging server (see Configuring Genesys Intelligent Automation for more details). Important This is optional and only required if you want to use the SYSLOG functionality provided by the Log4j component within Intelligent Automation.	Ports to be confirmed by the customer.	