eServices Deployment Guide

Using the eServices Configuration Wizards

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> **Important**
>
> This document is currently being updated as eServices Configuration Wizards are no longer supported. You must install the eServices components using their Installation Packages separately. For information on how to do manual installation of the components, see Manual Installation of eServices Components.

The eServices Configuration Wizards consist of a main wizard and multiple secondary wizards, which are launched automatically when you indicate that you want to configure particular components. The wizard presents only those pages that are applicable for your deployment, or for the stage of deployment that you have reached.

This section summarizes the flow (including installing the wizards and workflow samples) of the main and secondary wizards to deploy the model setup. The information in the Key Actions and Inputs (Model Setup)column gives you the model-specific data inputs and actions for that section of the wizard.

The details of your solution configuration are entered into the Configuration Database when you have completed the wizard. Exiting the wizard prior to completion requires that you begin the solution configuration from the beginning. Any components you create along the way, however, are available during subsequent solution configuration using the wizard.

Configuration Wizards

Using the Wizard to Configure your eServices Components

Installing the Configuration Wizards

Prerequisites

- Interaction Management CD.
- Start the Configuration Layer.

1. Install the eServices Configuration Wizards and Genesys Wizard Manager.
   a. In the root directory of the Interaction Management CD, find `Setup.exe`.

b. Run `Setup.exe` and follow the directions. You may want to read the Wizard Advisory supplied with the wizard.

2. If you intend to configure your Stat Server as you configure eServices, you should also install the configuration wizard for this product.

Installing and Starting the Workflow Samples

Interaction Workflow Samples use a number of preconfigured Script objects of various subtypes, including Simple Routing, Interaction Queue, Workbin, and Interaction View.

Prerequisites

- Interaction Management CD.

1. Install the Interaction Workflow Samples.
   a. On your Interaction Management CD, find and double-click `Setup.exe` in the `solution_specific\InteractionWorkflowSamples\windows` directory.
   b. At the welcome page for the installation wizard, click **Next**.
   c. Specify the destination for Interaction Workflow Samples, and click **Next**.
   d. Click **Install**.
   e. Click **Finish**.
2. Start the Interaction Workflow Samples.
   a. From the Windows taskbar, select **Start > Programs > Genesys Solutions > eServices 8.1.3 > Interaction Workflow Samples > Start Interaction Workflow Samples**. This launches the Interaction Workflow Samples Wizard.
   b. Login to the wizard using your user name and password.
   c. At the Welcome to Interaction Workflow Samples Wizard window, click **Next**.
   d. If using a multi-tenant environment, select the Tenant and click **Next**.

> **Tip**
> During the installation, the setup procedure does not look for possible name conflicts between existing objects and new components from the Interaction Workflow Samples. It overwrites any existing objects. In order to prevent the loss of existing objects, Genesys recommends you install the new samples into a separate tenant. Alternatively, you should use IRD's Business processes export capability to create backups of workflows and strategies related to an existing configuration.

e. Specify a destination directory for the strategy files, and click **Next**.
You may want to select the directory used for your Interaction Routing Designer strategies, unless it already contains strategies with same file names, which would then be overwritten. If you do decide to use that particular directory, make a backup of its content before proceeding.

> **Tip**
> Do not select the `StrategyFiles` directory created during installation of your Interaction Workflow Samples as the target here. This causes a file "collision", since the source and target files are then identical.

f. At the **Import Completed** window, click **Next**.

Click **Finish**. Once you exit the wizard, you can view the new objects (over 180 of them) installed with these Samples, by opening the `<tenant>\Scripts` folder in Configuration Manager or Genesys Administrator.

Launching the Configuration Wizard

To launch the Genesys Wizard Manager:

1. From the Windows taskbar, select **Start > Programs > Genesys Solutions > eServices 8.1.0 > eServices Configuration Wizards > Start Wizard Manager**.
2. Click **Log into the Configuration Layer**. This opens the main **Genesys Wizard Manager** window.
3. Select **Multimedia** from the menu on the left side of the window, and then select **Deploy Multimedia Solution in your contact center**. The **eServices Configuration Wizard Welcome** page opens.
4. Click **Next** to begin configuring eServices objects.

Naming your Solution

- At the **Solution Name** page, enter a name for your solution and click **Next**.

```
Name = ES85
```

Selecting the Configuration Type

Select Simple or Custom Configuration

1. At the **Configuration Process Selection** page, select one of the following:
   - Simple single-host configuration
   - Custom Configuration

> **Important**
> For this model setup, select **Custom Configuration**.

2. Click **Next**.

> **Important**
> The **Simple single-host configuration** option is available for a predefined host in Windows deployments only. This chapter describes the custom configuration process. If you choose the simple configuration with Windows, use this chapter by skipping those steps that the wizard does not present to you during deployment.

Copying the IP to your shared directory

1. At the **Installation Package** page, click **Have Disk** and navigate to the Interaction Management CD.
2. To select a destination for the package, click **Browse** and navigate to your shared directory).
3. Click **Next**.

> **Important**
> eServices uses this group of components for installation. In later steps you will copy to this directory installation packages that are specific to each eServices component.

4. At the **Installation Ready** page, confirm that your software is ready for installation and click **Next**.

Selecting or Adding Message Server

1. At the **Solution Components: Message Server** page, select or add a Message Server.

2. Click **Next**.

Creating the Component DAP

At this point in the wizard, you begin creating your DAPs and associated DB Servers. You must create all DAPs and DB Servers here, before moving on to other components. The eServices Configuration Wizard does not permit you to create DAPs later in the configuration. Relaunch the Database Access Point Wizard as necessary.

1. At the **Solution Components: Data Access Point** page, click **Add**.
2. At the **Browse for Application** page, click the **New Application** icon.
3. Create a new DAP.
4. Enter your Database Access Point information:

Component DAP	Application Name	DB Server Name	JDBC Connection	Database Information	Case Conversion
Interaction Server	ES85_Ixn_DAP	ES85_IxnDBServer	Clear the check box **Note:** It is important to clear the Enable JDBC access box. Failing to do so can lead to a configuration problem.	• DBMS Type = mssql • DBMS Name = ESHost • Database Name/SID = IxnDB • User Name = sa • Password = <password for user sa>	any **Note:** The Interaction Server DAP must have its Case Conversion attribute set to any or upper. Setting it to lower causes an error when Interaction Server initializes.
Universal Contact Server	ES85_UCS_DAP	[NONE] **Note:** UCS connects to its database	Select the check box, and enter the following information: • Host = ESHost	• DBMS Type = mssql • DBMS Name ="" **Note:** If	any

Component DAP	Application Name	DB Server Name	JDBC Connection	Database Information	Case Conversion
		directly through JDBC. You do not need to create a DB Server Application object for it.	• Port (for JDBC) = 1433 (Microsoft SQL default) • Role = Main **Note:** If your RDBMS is Microsoft SQL Server on a different host, select the host where you have Microsoft SQL Server installed, and enter the connection information for that instance of the database.	you do not clear the DBMS Name box, your UCS will not work properly. • Database Name/SID = Customer • User Name = sa • Password = <password for user sa>	

5. Click **Finish** to complete the Database Access Point Wizard and return to the eServices Configuration Wizard.
6. In the **Browse for Application:** page, select the Database Access Point that was just configured and click **OK**.

> Tip

> If you are using a Microsoft SQL 2005 database, an additional configuration step is recommended for the UCS DAP.
>
> In Configuration Manager or Genesys Administrator, create a `settings` section on the **Options** tab. Create a new option, setting the option name as `prepare` and the option value to **false**.
>
> Additional details are provided in the eServices Administrator's Guide.

Adding DB Server

1. Click the folder icon beside DB Server, and then click the **New Application** icon to run the DB Server Wizard.
2. Follow the wizard's directions and enter the following information:

Application Name	Host	Default Port	DBMS Type
ES85_IxnDBServer	ESHost	6110	mssql

3. At the **Installation Package** page, copy the DB Server installation package. Select a source (the Management Framework CD) and a destination (the shared directory). Click **Next**.
4. At the **Installation Ready** page, confirm that your DB Server software is ready for installation, and then click **Next**.
5. At the **Listening Ports and Transport Layer Security (TLS) Settings** page, click **Next**.

> **Important**
>
> For this model setup, we do not require any additional ports. If you want to install additional ports, you can do so in Configuration Manager or Genesys Administrator later.

6. At the **Log Configuration** page, take the defaults. Click **Next**.
7. At the **Backup Server Information** page, because no backup servers are configured, clear the checkbox and click **Next**.
8. Click **Finish** to exit the DB Server Wizard. The Database Access Point Wizard will resume.

Adding UCS and Interaction Server

1. At the **Solution Components:** page, select your component, and Click **Add**.
2. At the **Browse for Application :** page, click the **New Application** icon.
3. Follow the wizard's direction, and enter the following information:

Application Name	Type	Host	Default Port	API Port	Connections	License Connection	Login Account
ES85_UCS	N/A	ESHost	6120	Accept the default port value, or enter a port number where UCS should listen for third-party protocol connections.	• Message Server • DAP: ES85_UCS_DAP	N/A	Select the user account (Configuration Layer Person object) or Access Group that UCS is to use to log in to the Configuration Layer. UCS uses the Configuration Layer to pass some of its information back and forth to certain components. The selected account or access group must have write

Application Name	Type	Host	Default Port	API Port	Connections	License Connection	Login Account
							access to the tenant in use. Refer to Configuration Server access permissions for more information.
ES85_IxnSrv	Select `New-style`. • The eServices Configuration Wizard automatically creates a multimedia `Switch` object for you in the background. Continue at "Configure Framework Resources". • If your configuration does not include a properly configured `Multi`	ESHost	6130	N/A	• Servers for Third-Party Protocol • DAP: ES85_Ixn_DAP. If you already installed related eServices components (Universal Contact Server, E-mail Server, and Classification Server, for instance), you can connect	• License Server Host = ESHost • License Server Port = 7260 • Specify the number of licenses for Interaction Server features	N/A

Application Name	Type	Host	Default Port	API Port	Connections	License Connection	Login Account
	media type Switch object, continue at "Create a Multimedia Switch object (Switch-based Interaction Server only)"				to them now using this page.		

4. At the **Log Configuration:** page, accept the defaults and click **Next**.
5. At the **Installation Package:** page,
   - Click **Have Disk**, navigate to the Interaction Management CD, and then click **OK**.
   - Click **Browse**, navigate to your shared directory, and then click **Next**.
6. At the **Installation Ready:** page, click **Next**.
7. Click **Finish** to exit the Wizard and return to the eServices Configuration Wizard.
8. At the **Browse for Application:** page, select the the server and click **OK**.
9. Click **Next**.

Creating a Multimedia Switch Object (Switch-based Interaction Server only)

> **Important**
>
> Before attempting to run your eServices solution, check Configuration Manager or Genesys Administrator for the existence of a `Multimedia Switch` object. If for some reason the wizard has failed to create one, use the Framework Wizard to create it. No other configuration is required; the components that require this switch are able to locate it automatically.

1. If you select **Switch-based Interaction Server**, the wizard checks for the following:
   - A `Multimedia`-type switch
   - A connection from the switch to a `T-Server` type Interaction Server

   If the wizard fails to detect either the switch or its connection to T-Server, it issues a warning. Click **Proceed** to launch the Switch Wizard.

> **Important**
>
> You can use a preexisting Switch object (that is connected to a properly configured Interaction Server) from your Configuration Layer, if available.

2. To create a new `Multimedia` type Switch object, provide a unique name for it and click **Next**. (The wizard allows you to create the new Switch only in folders designated to contain objects of type Switch.)
   Name = `ES85_Switch`

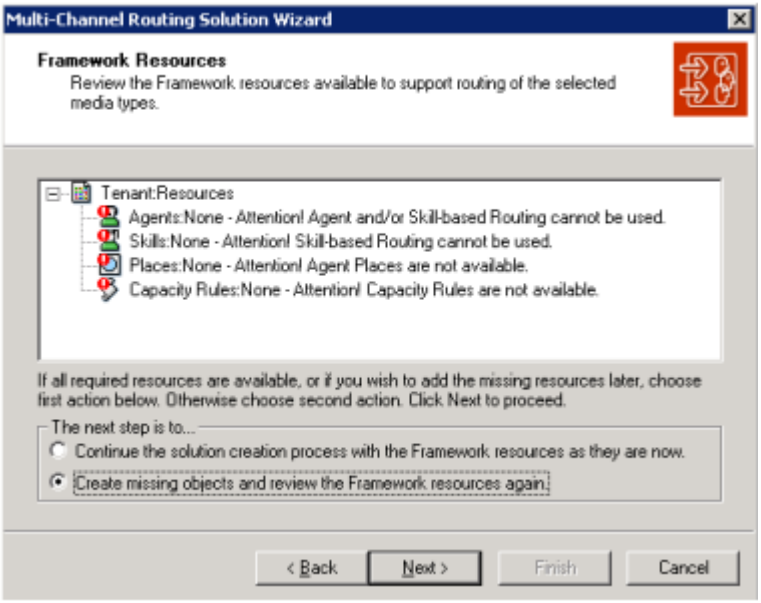
> **Important**
>
> Even though the Configuration Layer permits assignment of multiple Switches of type Multimedia Switch to a single Interaction Server Application object, Genesys does not currently support such a configuration. This type of configuration can lead to unpredictable behavior on the part of the application that is connected to the switches.

3. At the **Switching Office:** page, click **Add** to create a new Switching Office object. Enter the following information:
   - **Name** = `ES85_Switching_Office`
   - **Switch Type** = `Multimedia Switch`
4. Click **Finish**.
5. At the **Switch Summary** page, review the details and click **Next**.

Configuring Framework Resources

1. If you select `New-Style Interaction Server`, the wizard opens the **Framework Resources**. This page lists the following:
   - Current Framework resources

- Any missing resources required to support the media types served by your switch



2. To create the missing resources now, select **Create missing objects and review the Framework resources again**, and then click **Next**. For this model setup, select this option.
   In your own deployment, you can choose to wait until after you finish the wizard to create the required objects. Select **Continue the solution creation process with the Framework resources as they are now**.
3. At the **Framework Objects** page, select the object type you want to create from the drop-down menu. For this model setup, create and configure the various objects as follows:

Object Type	Model Setup
Place	Create `Place` objects to facilitate the routing of multimedia interactions: • **Place Name** = `Agent1Place` **Note:** Do not create any DNs associated with this `Place` object, though you may want to create a `Place Group` object for this place, as suggested in the wizard.
Capacity Rule	By default, as the final step of the solution's configuration, the wizard creates and installs three capacity rules for your tenant. Do not create any capacity rules here

Object Type	Model Setup
	(although you can, if you have previously installed the Resource Capacity Wizard, which is available on the Real-Time Metrics Engine CD).
Agent	Create `Person` objects to represent agents in your model setup and assign agent IDs to them. (Also use this step to create any `Person` objects you intend to use as the autoreply agents for supplying agent-related information in standard responses). • **Agent Name** = `Agent One` • **Employee ID** = `Agent1` • **User Name** = `Agent1` • **Password** = `Agent1` **Note:** The agent values supplied here are for general use in this model setup, and do not correspond to the actual steps suggested by the wizard for the creation of `Person` objects. A `Person` object's user name must be unique within the Configuration Database. This is not a concern for this model installation, which is in a single-tenant environment. If you were installing more than one set of eServices components in a multi-tenant environment, you would use distinct names across tenants.
Agent Login	Create `Agent Login` objects to enable agents to log in to the

Object Type	Model Setup
	switch. The agent login code must correspond to the agent login numbering of your switch.
Skill	You do not need to create skills for this model installation.

Selecting a Stat Server

At the **Solution Components:** page, select **Stat Server:**. Click **Add** and select a Stat Server. This connects all the appropriate components in your eServices solution to this Stat Server.

> **Important**
>
> Even though the wizard allows you to create a Stat Server here, do not do so. Prior to using the wizard, you should have one Stat Server per eServices tenant already configured and installed in your environment.

If you receive a warning message, it indicates that Stat Server does not yet have a connection to Interaction Server (or to Interaction Server Proxy). This connection is required for both the routing and reporting of eServices interactions.

- If you click **Yes**, you may receive an error message if the Stat Server wizard is not installed on your machine. The connection cannot be created at this time.
- If you click **No** (the recommended approach), make sure that you add the connection from Stat Server to Interaction Server before you attempt to use routing or reporting with the eServices solution.

Adding the Other Components

1. At the **Solution Components:** page, select your component, and Click **Add**.
2. At the **Browse for Application :** page, click the **New Application** icon.
3. Follow the wizard's directions, and enter the following information:

Component	Application Name	Host	Default Port	Connections	Other Details
Universal Routing Server	Select the URS that you				

Component	Application Name	Host	Default Port	Connections	Other Details
(URS)	created and installed as one of the prerequisites for your eServices installation. If you receive a warning but stating that URS is not configured to monitor Interaction Server, click **Yes** to reconfigure now, or click **No** to reconfigure later. If you click **No**, make sure you add the required connections after configuration and installation are complete.				
Application Cluster	Add an application cluster if you intend to group your eServices components into groups for load-balancing purposes. After giving a name to your new application cluster, the Application Cluster Wizard invites you to group, for instance, Chat Server, and E-mail Server, as well as				

Component	Application Name	Host	Default Port	Connections	Other Details
	other application clusters.				
Web API Server					Although it may appear in the Wizard, this component is not included in the 8.5.0 release.
Universal Contact Server Manager	ES85_UCSMgr			Universal Contact Server	
E-mail Server	ES85_E-mailServer	ESHost	6150	• Message Server • Interaction Server • UCS	• POP3 server name = ESHost • POP server type = POP3 • SMTP server name = ESHost **Note:** This model installation uses ESHost as its POP3 and SMTP servers. If you are using your enterprise POP3 server, enter its name as the POP3 server

Component	Application Name	Host	Default Port	Connections	Other Details
					name value. You do not need to enter a value for the SMTP server name if it is the same server that you used for POP3 server name. • Address = <mailboxName>@ESHost • User name = <username> • Password = <password> • E-mail address default domain name = ESHost • External Agent e-mail address = external@ESHost • Enable Web Form Processing by selecting the check box, and provide a port where

Component	Application Name	Host	Default Port	Connections	Other Details
					the Web API Server should listen for requests—for example IWF Processing Port = 7777. • Enter the e-mail address that is used to supply field values in automated responses generated in the contact center. Select an existing Person object from the Configuration Layer: Auto-reply Agent = Agent1 • Configure e-mail accounts that exist on your corporate e-mail server for customers to use when contacting your company—for example:

Component	Application Name	Host	Default Port	Connections	Other Details
					• Customer access account 1 = <mailboxName1>@ES • Customer access account 2 = <mailboxName2>@ES **Note:** If you installed the Interaction Workflow Samples, then your configuration will automatically include the following three e-mail accounts (which are used in the samples): Customer support, Tech support, and Warranty support. If you did not install the Interaction

Component	Application Name	Host	Default Port	Connections	Other Details
					Workflow Samples before running the wizard, then no e-mail accounts are shown. You must add and configure at least one e-mail account before continuing.
Classification Server	ES85_ClassificationServer	ESHost	6160	• Message Server • UCS	• License Server Host = ESHost • License Server Port = 7260
Training Server	ES85_TrainingServer	ESHost	6170	• Message Server • UCS	
Knowledge Manager	ES85_KnowledgeManager			• Message Server • UCS	Indicate that you have a Classification Server Content Analysis license installed by selecting the check box of the same name. If you do not have this license,

Component	Application Name	Host	Default Port	Connections	Other Details
					do not select this check box.
Chat Server	ES85_ChatServer	ESHost	6180	• Message Server • Interaction Server • UCS	You can change the ESP and webapi ports if necessary. ESP refers to the ability of URS to submit messages directly from a strategy into a chat session—for example, to greet a customer who is waiting for an agent. The webapi port is to be used by Web API Server.

4. At the **Log Configuration:** page, accept the defaults and click **Next**.
5. At the **Installation Package:** page,
   - Click **Have Disk**, navigate to the Interaction Management CD, and then click **OK**.
   - Click **Browse**, navigate to your shared directory, and then click **Next**.
6. At the **Installation Ready:** page, click **Next**.
7. Click **Finish** to exit the Wizard and return to the eServices Configuration Wizard.
8. At the **Browse for Application:** page, select the the server and click **OK**.
9. Click **Next**.

Creating Capacity Rules

1. At the **Resource Capacity Rules Deployment:** page, select a folder in the Configuration Server where eServices should store its resource capacity rules. Click **Next**.
2. At the **Resource Capacity Rules Selection:** page, select the capacity rule you want to use as the default for eServices. The wizard assigns that rule to the Tenant object associated with your deployment in the previous step. Click **Next**.

Completing the Wizard

1. At the **Solution Summary:** page, review solution components you have collected for use with eServices. Click **Next** to finish the configuration or **Back** to change the configuration of some solution component.
2. At the **Completing the eServices Solution Wizard:** page, click **Finish** to confirm your solution configuration. Remember that you can change configuration details at a later time as well.

> **Important**
>
> Only at this point, when you exit the wizard, are the details of your solution configuration entered into the Configuration Database. Exiting the wizard prior to this point requires that you begin the solution configuration from the beginning. Any components you create along the way, however, are available during subsequent solution configuration using the wizard.