

T-Server and CSTA Connector General Deployment

This chapter contains general information for the deployment, configuration, and installation of your T-Server. You may have to complete additional configuration and installation steps specific to your T-Server and switch.

This chapter contains these sections:

- [Prerequisites, page 13](#)
- [Deployment Sequence, page 18](#)
- [Deployment of T-Server, page 18](#)
- [Next Steps, page 25](#)

Note: You *must* read the *Framework 8.1 Deployment Guide* before proceeding with this T-Server guide. That book contains information about the Genesys software you must deploy before deploying T-Server.

Prerequisites

T-Server has a number of prerequisites for deployment. Read through this section before deploying your T-Server.

Software Requirements

Framework Components

You can only configure T-Server after you have deployed the Configuration Layer of Genesys Framework. This layer contains DB Server, Configuration Server, and Configuration Manager. If you intend to monitor or control T-Server through the Management Layer, you must also install and configure

components of this Framework layer, such as Local Control Agent (LCA), Message Server, Solution Control Server (SCS), and Solution Control Interface (SCI), before deploying T-Server.

Refer to the *Framework 8.1 Deployment Guide* for information about, and deployment instructions for, these Framework components.

Media Layer and LCA

To monitor the status of components in the Media Layer through the Management Layer, you must load an instance of LCA on every host running Media Layer components. Without LCA, Management Layer cannot monitor the status of any of these components. If you do not use the Management Layer, LCA is not required.

Supported Platforms

Refer to the *Genesys Supported Operating Environment Reference Manual* for the list of operating systems and database systems supported in Genesys releases 6.x, 7.x, and 8.x. You can find this document on the Genesys Technical Support website at

<http://genesyslab.com/support/dl/retrieve/default.asp?item=B6C52FB62DB42BB229B02755A3D92054&view=item>.

For UNIX-based (UNIX) operating systems, also review the list of patches Genesys uses for software product builds, and upgrade your patch configuration if necessary. A description of patch configuration is linked to installation `read_me.html` files for the Genesys applications that operate on UNIX, and is available within the installation packages.

Security

Starting with release 7.5, T-Server supports the Genesys Transport Layer Security (TLS) and can be configured for secure data exchange with the other Genesys components that support this functionality.

The Genesys TLS is not supported on all operating systems that T-Server itself supports. For information about the supported operating systems, see the *Genesys 8.x Security Deployment Guide*.

Hardware and Network Environment Requirements

Hosting

Genesys recommends that you or your IT specialist assign host computers to Genesys software before you start Genesys installation. Remember the following restrictions:

- Do not install all the Genesys server applications on the same host computer.
- When installing a few server applications on the same host computer, prevent them (except for Configuration Server) from using the swap area.

Installation Privileges

During deployment, be sure to log in with an account that will permit you to perform administrative functions—that is, one that has root privileges.

Server Locations

Refer to the “Network Locations for Framework Components” chapter of the *Framework 8.1 Deployment Guide* for recommendations on server locations.

Supported Platforms

Refer to the *Genesys Supported Media Interfaces Reference Manual* for the list of supported switch and PBX versions. You can find this document on the Genesys Technical Support website at <http://genesyslab.com/support/dl/retrieve/default.asp?item=A9CB309AF4DEB8127C5640A3C32445A7&view=item>.

Licensing Requirements

All Genesys software is licensed—that is, it is not shareware. Genesys products are protected through legal license conditions as part of your purchase contract. However, the level of technical license-control enforcement varies across different solutions and components.

Before you begin to install T-Server, remember that, although you may not have had to use technical licenses for your software when you deployed the Configuration and Management Layers in their basic configurations, this is not the case with the Media Layer.

T-Server requires seat-related DN technical licenses to operate even in its most basic configuration. Without appropriate licenses, you cannot install and start T-Server. If you have not already done so, Genesys recommends that you install License Manager and configure a license file at this point. For complete information on which products require what types of licenses, and on the installation procedure for License Manager, refer to the *Genesys Licensing Guide* available on the Genesys Documentation Library DVD.

The sections that follow briefly describe the T-Server license types.

Note: Starting with release 7.2, the licensing requirements for T-Server have changed from previous releases. Please read this section carefully and refer to the *Genesys Licensing Guide* for complete licensing information.

Licensing Basic Implementations

A stand-alone T-Server serving a single site requires licenses to register all DNs it monitors. DNs that agents use in day-to-day contact center operations, such as Extensions and ACD Positions, have to be registered using licenses that control agent seats.

Note: Configure all seat DNs that agents use (Extensions and ACD Positions) in the Configuration Layer. This enables detailed call monitoring through Genesys reporting, and generally allows you to control access to individual DNs.

Licensing HA Implementations

T-Servers operating with the hot standby redundancy type require a special CTI HA technical license, which allows for high-availability implementations, in addition to regular T-Server licenses. Neither T-Server in a redundant pair configured for hot standby starts if this license is unavailable. Moreover, the primary and backup T-Servers must use the same licenses to control the same pool of DNs. If your T-Servers are configured with the hot standby redundancy type, order licenses for CTI HA support.

Licensing Multi-Site Implementations

T-Servers performing multi-site operations require licenses that allow for such operations, in addition to regular T-Server licenses. If some of your T-Servers are configured for multi-site routing while others are not, either order licenses for multi-site support for all T-Servers or install an additional License Manager to handle the T-Servers involved in multi-site routing.

Note: You do not need licenses for multi-site support if some T-Server clients include the local location as the `location` attribute value in their requests for routing within the same site.

Configuring License Files

You need a license to configure and install Media Layer components. Genesys recommends that, if you have not already done so, at this point you:

1. Install License Manager.
2. Configure license files.

Note: If you use the <port>@<server> format when entering the name of the license server during installation, remember that some operating systems use @ as a special character. In this case, the installation routine is unable to write license information for T-Server to the Configuration Layer or the run.sh file. Therefore, when you use the <port>@<server> format, you must manually modify the command-line license parameter after installing T-Server.

For information about which products require what types of licenses and for the installation procedure for License Manager, refer to the *Genesys Licensing Guide* available on the Genesys Documentation Library DVD.

About Configuration Options

Configuring T-Server is not a onetime operation. It is something you do at the time of installation and then in an ongoing way to ensure the continued optimal performance of your software. You must enter values for T-Server configuration options on the Options tab of your T-Server Application object in Configuration Manager. The instructions for configuring and installing T-Server that you see here are only the most rudimentary parts of the process. Pay particular attention to the configuration options specific to your own T-Server.

Configuration options common to all T-Servers, independent of switch type, are described in the “T-Server Common Configuration Options” chapter. *T-Server-specific* configuration options are described in a separate chapter. T-Server also supports unified Genesys log options, as described in the “Common Configuration Options” chapter.

Options that configure values for the TSCP software in your T-Server are common to all T-Servers. Options based on the custom features of your switch apply to your T-Server only. Familiarize yourself with both types of options. You will want to adjust them to accommodate your production environment and the business rules that you want implemented there.

Deployment Sequence

This is the recommended sequence to follow when deploying T-Server and CSTA Connector.

Task Summary: Deployment Sequence

Objective	Related Procedures and Actions
1. Deploy Configuration Layer objects and ensure Configuration Manager is running.	See the <i>Framework 8.1 Deployment Guide</i> for details.
2. Deploy Network objects (such as Host objects).	See the <i>Framework 8.1 Deployment Guide</i> for details.
3. Deploy the Management Layer.	See the <i>Framework 8.1 Deployment Guide</i> for details.
4. Deploy T-Server.	See, “Deployment of T-Server” .
5. Test your configuration and installation.	See , “Starting and Stopping T-Server and CSTA Connector,” on page 97 .

Note: If, during the installation procedure for any of the Genesys applications, the script warns you that Configuration Server is unavailable and that the configuration cannot be updated, continue with the installation. Following the installation, you must complete the information on the Start Info tab to ensure that T-Server will run.

Deployment of T-Server

Deploying T-Server manually requires that you configure a number of different objects in the Configuration Layer prior to setting up your T-Server objects and then install T-Server. This section describes the manual deployment process.

Configuration of Telephony Objects

This section describes how to manually configure T-Server telephony objects if you are using Configuration Manager. For information about configuring T-Server telephony objects using Genesys Administrator, refer to the *Framework 8.1 Genesys Administrator Help*.

Recommendations

Genesys recommends registering (configuring) only those entities you plan to use in the current configuration. The more data there is in the Configuration Database, the longer it takes for the CTI setup to start, and the longer it will take to process configuration data. Remember that adding configuration objects to the Genesys Configuration Database does not cause any interruption in contact center operation.

Depending on how much work is required to manually configure all applications and objects, consider registering more `Person` objects first, with a set of privileges that lets them perform configuration tasks.

Switching Offices

Your telephony network may contain many switching offices, but you should only configure those that are involved with customer interactions.

Using Configuration Manager, be sure to register a `Switching Office` object that accommodates your `Switch` object under `Environment`. Until you have done this, you cannot register a `Switch` object under `Resources` (single-tenant environment) or a `Tenant` (multi-tenant environment).

Note: The value for the switching office name must not have spaces in it.

Note: The following script needs to be run in pre 8.1 ML environments in order for the BroadSoft BroadWorks Switching Office object to be available in Configuration Server (introduced as an object in 8.1 Configuration Server):

```
INSERT INTO cfg_locale VALUES(1, 8, 1, 81, 0, 'BroadSoft  
BroadWorks', 'Enum_CfgSwitchType')
```

Switches

1. Configure a `Switch` object for each switch on your telephony network. Assign each `Switch` object to the appropriate `T-Server Application` object.
2. If implementing the multi-site configuration, specify access codes for all switches on the network so that the call-processing applications can route and transfer calls between switches.

Two types of access codes exist in a Genesys configuration:

- Default access codes that specify how to reach this switch from any other switch in the Genesys environment.

- Switch-to-switch access codes that specify how to reach a particular switch from any other switch. Use this type when either a nondefault dial number or routing type is required between any two locations. When a switch-to-switch access code is configured, its value has a higher priority than that of a default access code.

See Chapter 4, “Multi-Site Support,” on [page 39](#), for step-by-step instructions.

Note: When the numbering plan uses unique directory number (DN) assignment across sites and multi-site routing is not used, you do not have to configure access codes.

DNs and Agent Logins

For each T-Server for which you are configuring DNs, you must configure all DNs that agents and their supervisors use in day-to-day contact center operation—so-called *seat-related DNs*—such as Extensions and ACD Positions. Otherwise, T-Server does not register such DNs.

1. To configure Telephony objects within each switch, consult the switch documentation.
2. Check the numbering plan for different types of DNs, to see if you can save time by registering Ranges of DNs. Usually, DNs of the same type have consecutive numbers, which will make an otherwise tedious configuration task easy. Agent Login objects almost always have consecutive numbers, which means you can register them through the Range of Agent Logins feature as well.
3. If you plan to use Virtual Queues and Virtual Routing Points in the contact center operation, Genesys recommends registering them after you have outlined the call-processing algorithms and identified your reporting needs.

Note: Remember that CTI applications, not the switch, generate telephony events for DNs of these types.

Warning! When setting the Register flag for a DN, make sure you select the value according to your T-Server. The Register flag values are as follows:

- `False`—T-Server processes this DN locally, and never registers it on the switch.
 - `True`—T-Server always registers this DN on the switch during T-Server startup or CTI link reconnect.
 - `On Demand`—T-Server registers this DN on the switch only if a T-Server client requests that it be registered.
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Multi-Site Operations

See the section, “Configuring Multi-Site Support” on [page 82](#), for information on setting up DNS for multi-site operations.

Configuration of T-Server

Use the *Framework 8.1 Deployment Guide* to prepare accurate configuration information. You may also want to consult *Configuration Manager Help* and/or *Genesys Administrator Help*, which contains detailed information about configuring objects.

Recommendations

Genesys recommends using an Application Template when you are configuring your T-Server application. The Application Template for your particular T-Server contains the most important configuration options set to the values recommended for the majority of environments. When modifying configuration options for your T-Server application later in the process, you can change the values inherited from the template rather than create all the options by yourself.

Procedure: Configuring T-Server

Start of procedure

1. Follow the standard procedure for configuring all Application objects to begin configuring your T-Server Application object. Refer to the *Framework 8.1 Deployment Guide* for instructions.
2. In a Multi-Tenant environment, specify the Tenant to which this T-Server belongs on the General tab of the Properties dialog box.
3. On the Connections tab:
 - Add all Genesys applications to which T-Server must connect.

Note: For multi-site deployments you should also specify T-Server connections on the Connections tab for any T-Servers that may transfer calls directly to each other.

4. On the Options tab, specify values for configuration options as appropriate for your environment.

5. In a multi-site environment, you must complete additional T-Server configuration steps to support multi-site operations; see Chapter 4, “Multi-Site Support,” on [page 39](#).

End of procedure

Next Steps

- See “Installation of T-Server” on [page 22](#).

Procedure: Configuring multiple ports

Purpose: To configure multiple ports in T-Server for its client connections.

Start of procedure

1. Open the T-Server Application Properties dialog box.
2. Click the Server Info tab.
3. In the Ports section, click Add Port.
4. In the Port Properties dialog box, on the Port Info tab:
 - a. In the Port ID text box, enter the port ID.
 - b. In the Communication Port text box, enter the number of the new port.
 - c. In the Connection Protocol box, select the connection protocol, if necessary.
 - d. Select the Listening Mode option.

Note: For more information on configuring secure connections between Framework components, see *Genesys 8.x Security Deployment Guide*.

- e. Click OK.
5. Click OK to save the new configuration.

End of procedure

Installation of T-Server

The following directories on the Genesys 8.1 Media product DVD contain T-Server installation packages:

- `media_layer/<switch>/<platform>` for UNIX installations, where `<switch>` is your switch name and `<platform>` is your operating system.

- `media_layer\<switch>\windows` for Windows installations, where `<switch>` is your switch name.

Procedure: Installing T-Server on UNIX

Note: During installation on UNIX, all files are copied into the directory you specify. No additional directories are created within this directory. Therefore, do not install different products into the same directory.

Start of procedure

1. In the directory to which the T-Server installation package was copied, locate a shell script called `install.sh`.
2. Run this script from the command prompt by typing `sh` and the file name. For example: `sh install.sh`.
3. When prompted, confirm the host name of the computer on which T-Server is to be installed.
4. When prompted, specify the host and port of Configuration Server.
5. When prompted, enter the user name and password to access Configuration Server.
6. When prompted, select the T-Server application you configured in “Configuring T-Server” on [page 21](#) from the list of applications.
7. Specify the destination directory into which T-Server is to be installed, with the full path to it.
8. If the target installation directory has files in it, do one of the following:
 - Type 1 to back up all the files in the directory (recommended).
 - Type 2 to overwrite only the files in this installation package. Use this option only if the installation being upgraded operates properly.
 - Type 3 to erase all files in this directory before continuing with the installation.

The list of file names will appear on the screen as the files are copied to the destination directory.
9. If asked which version of the product to install, the 32-bit or the 64-bit, choose the one appropriate to your environment.
10. If asked about the license information that T-Server is to use: specify either the full path to, and the name of, the license file, or the license server parameters.

11. As soon as the installation process is finished, a message appears announcing that installation was successful. The process places T-Server in the directory with the name specified during the installation.

End of procedure

Next Steps

- To verify manual installation, go to “Verifying the installation of T-Server” on [page 25](#).
- To test your configuration and installation, go to , “Starting and Stopping T-Server and CSTA Connector,” on [page 97](#), and try it out.
- To configure and install redundant T-Servers, see Chapter 3, “High-Availability Deployment,” on [page 27](#).
- To install T-Servers for a multi-site environment, proceed to Chapter 4, “Multi-Site Support,” on [page 39](#).

Procedure: Installing T-Server on Windows

Start of procedure

1. In the directory to which the T-Server installation package was copied, locate and double-click `Setup.exe` to start the installation.
2. When prompted, specify the connection parameters to the Configuration Server associated with this T-Server.
3. When prompted, select the T-Server Application you configured in “Configuring T-Server” on [page 21](#) from the list of applications.
4. Specify the license information that T-Server is to use: either the full path to, and the name of, the license file, or the license server parameters.
5. Specify the destination directory into which T-Server is to be installed.
6. Click `Install` to begin the installation.
7. Click `Finish` to complete the installation.

By default, T-Server is installed as a Genesys service (Windows Services) with `Automatic` startup type.

End of procedure

Next Steps

- To verify manual installation, go to “Verifying the installation of T-Server” on [page 25](#).

- To test your configuration and installation, go to , “Starting and Stopping T-Server and CSTA Connector,” on [page 97](#), and try it out.
- To configure and install redundant T-Servers, see Chapter 3, “High-Availability Deployment,” on [page 27](#).
- To install T-Servers for a multi-site environment, proceed to Chapter 4, “Multi-Site Support,” on [page 39](#).

Procedure:

Verifying the installation of T-Server

Purpose: To verify the completeness of the manual installation of T-Server to ensure that T-Server will run.

Prerequisites

- [Procedure: Installing T-Server on UNIX, on page 23](#)
- [Procedure: Installing T-Server on Windows, on page 24](#)

Start of procedure

1. Open the Properties dialog box for a corresponding Application object in Configuration Manager.
2. Verify that the State Enabled check box on the General tab is selected.
3. Verify that the Working Directory, command-Line, and Command-Line Arguments are specified correctly on the Start Info tab.
4. Click Apply and OK to save any configuration updates.

End of procedure

Next Steps

At this point, you have configured and installed T-Server using Configuration Manager. If you want to test your configuration and installation, go to , “Starting and Stopping T-Server and CSTA Connector,” on [page 97](#), and try it out. Otherwise, if you want to configure and install redundant T-Servers, see Chapter 3, “High-Availability Deployment,” on [page 27](#). If you want to install T-Servers for a multi-site environment, proceed to Chapter 4, “Multi-Site Support,” on [page 39](#).

