Customer Guide to Genesys T-Server Integrations

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Version:	This guide should be used with NICE Uptivity (formerly Uptivity Premise) v5.6 or later.
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Introduction

Audience

This document is written for customers and prospective customers interested in using NICE Uptivity with CTI provided by Genesys T-Server. Readers who will perform procedures in this guide should have a basic level of familiarity with their telephony network, general networking, the Windows operating system, Genesys T-Server, and NICE Uptivity.

Goals

The goal of this document is to provide knowledge, reference, and procedural information necessary to understand a proposed NICE Uptivity integration using Genesys T-Server, and to configure the Genesys equipment to support the integration.

This document is NOT intended as a specific system or network design document. If further clarification is needed, consult with your telephony vendor(s).

Assumptions

This document assumes the reader has access to an NICE Uptivity Sales Engineer, Project Manager, or other resource to assist in applying this information to the reader's environment.

Need-to-Knows

To facilitate ease of use, this document takes advantage of PDF bookmarks. By opening the bookmark pane, readers can easily refer to the portion(s) of the guide that are relevant to their needs. For example, the NICE Uptivity application administrator can click the **Customer Administration Tasks** bookmark to jump directly to that section.

To expand and collapse the bookmark pane, click the bookmark icon on the left side of the document window.

For information and procedures related to NICE Uptivity configuration, consult the NICE Uptivity installation team.

This integration provides a CTI source only. A separate integration is required for audio acquisition, and that integration should be completed before the Genesys T-Server integration. The information provided by the Genesys system is flexible enough to be used with most audio recording methods, including passive VoIP, trunk side and station side TDM, and PBX specific methods. Consult the appropriate customer guide for knowledge and procedures related to audio acquisition.

Customer Responsibilities

You are responsible for supplying the physical connection(s), IP connection(s), or both to your telephone system and LAN, as well as any licensing required by Genesys. You may also be responsible for configuring Genesys system components to support the recording integration. See your specific integration in the Customer Integration Tasks section for additional information.

Genesys T-Server Integration Overview

The Genesys T-Server integration provides a real-time CTI stream of station- and agent-related events from the PBX. This CTI data can then be paired with an audio recording method to provide recorded calls with additional metadata that would not otherwise be available to NICE Uptivity.

The information provided by the Genesys T-Server is flexible enough to be used with most audio recording methods, including trunk-side, station-side, VoIP, and PBX-specific methods.
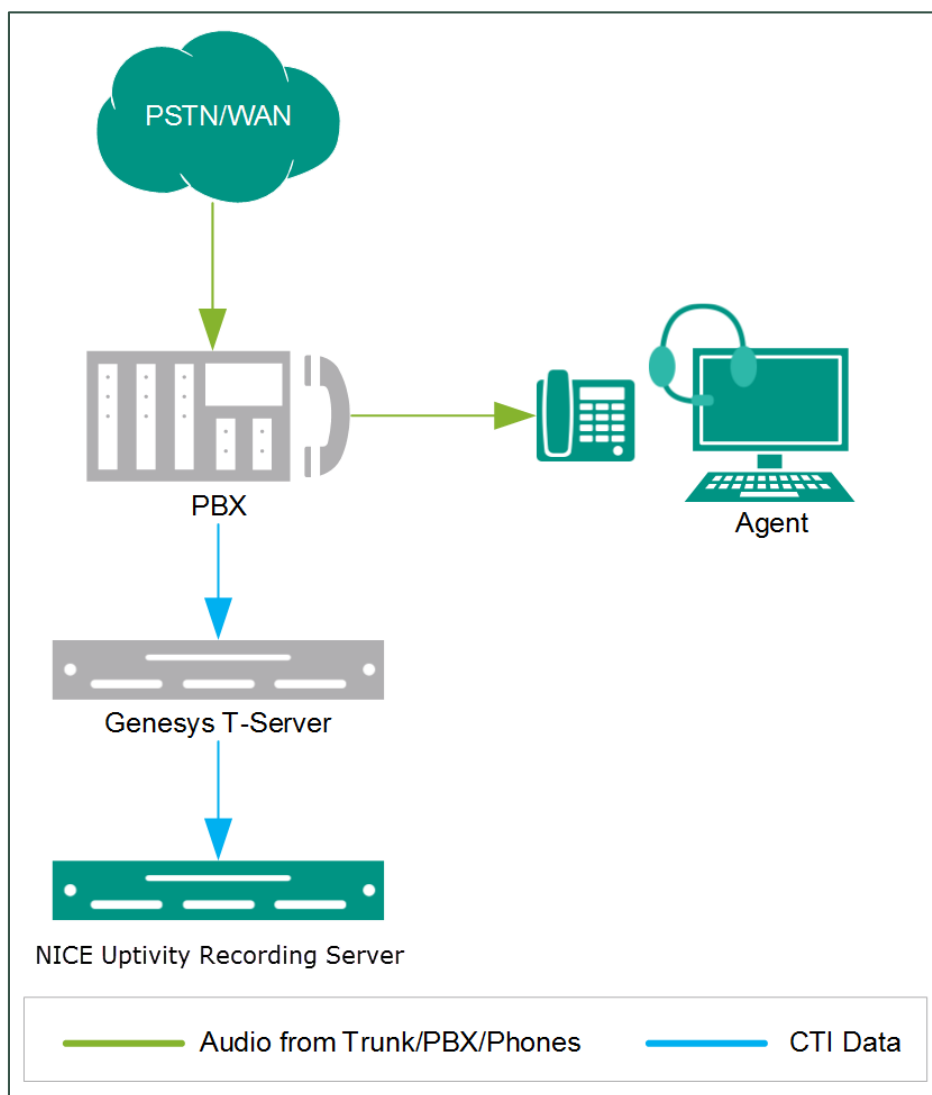
General architectural example of the Genesys T-Server integration; the audio integration is not detailed

Component	Function
PBX	Provides call routing, control, and ACD functions for agents. Sends all call control events to the Genesys T-Server. May also provide audio directly to NICE Uptivity.
Genesys T-Server	Receives call control events and business data and provides a CTI interface to NICE Uptivity.
NICE Uptivity Server(s)	Receives audio from the selected audio acquisition integration (such as trunk-side, station-side, PBX-specific, and so forth). Receives call control events from the T-Server to provide recording triggers and call metadata. Associates metadata with audio and screen recordings (if applicable). Manages storage of completed files and generates call records in the NICE Uptivity database. Provides user interface to NICE Uptivity through the **Web Portal**.

Genesys Requirements

Hardware and Software

Review Genesys documentation for hardware and system software specifications. This integration requires:

- Genesys T-Server version 7.6 to 8.0

These requirements are in addition to the audio source requirements; refer to the relevant customer guide for details.

Licensing

Licensing requirements are determined by Genesys and are subject to change. Consult your Genesys vendor for details. This integration typically requires additional licensing for monitoring functionality, including:

- One (1) tserver_tdn license for each device that will be monitored
- One (1) tserver_sdn license for each agent that will be monitored

NICE Uptivity Requirements

The NICE Uptivity hardware and software requirements are specified in the customer guide for the specific audio source integration. Those guides also explain the licensing requirements. No additional NICE Uptivity licensing is needed.

Customer Configuration Overview

The following table provides a high-level overview of the customer configuration steps in Genesys T-Server integrations. Links are provided for tasks that are covered in this guide.

| Customer Configuration Steps for Genesys T-Server Integrations	
1	Perform any required configurations for the audio source integration. See the applicable Customer Guide for more information.
2	Verify the T-Server Switch Link.
3	Verify T-Server Licensing.
4	Verify the DN List.
5	Provide the NICE Uptivity installation team with a list of the extensions or ACD groups to be monitored.

Customer Integration Tasks

The information in this section is provided for your reference only. Detailed steps for Genesys configuration can be found in Genesys documentation, which is available on the Genesys website or from your Genesys vendor. You should always use the appropriate guides from Genesys to install and configure Genesys components.

This section covers only procedures specific to the Genesys T-Server integration. Refer to the applicable customer guide for additional tasks required for the audio source integration.

Verify the T-Server Switch Link

A TCP link to the switch (PBX) is required for the Genesys T-Server to receive CTI events. To ensure accuracy, this information should be verified on both the Genesys T-Server and the PBX.

1. Log in to Genesys with an appropriately-permissioned account.

2. Open the **Genesys Configuration Manager**, and expand the **Environment** tree on the left-hand pane, then select the **Applications** folder.
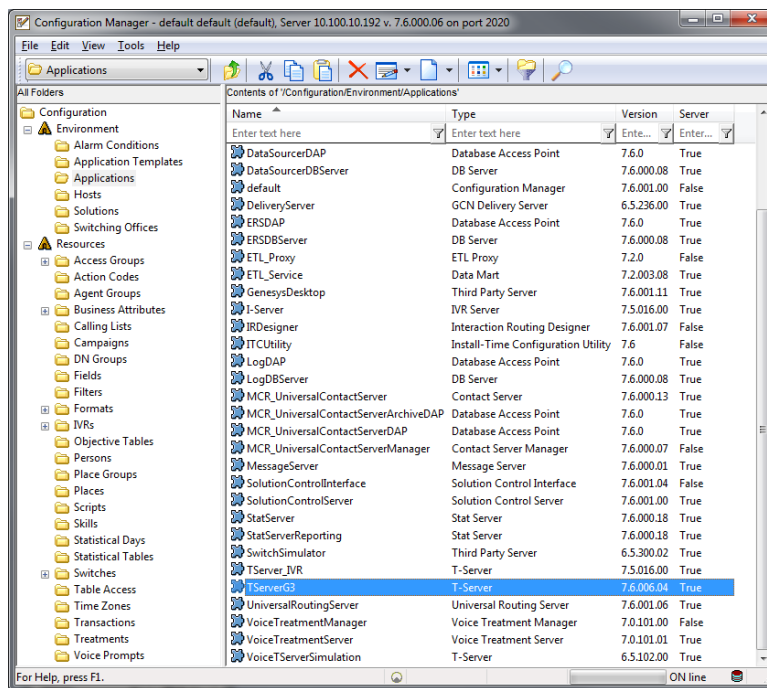
Customer Integration Tasks

3. From the **Applications** list, right-click the Genesys T-Server application that will be used for the integration and click **Properties**.
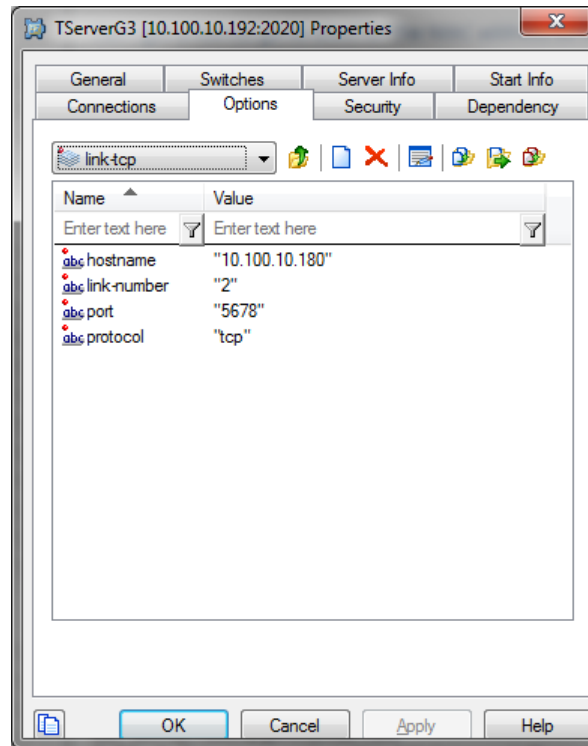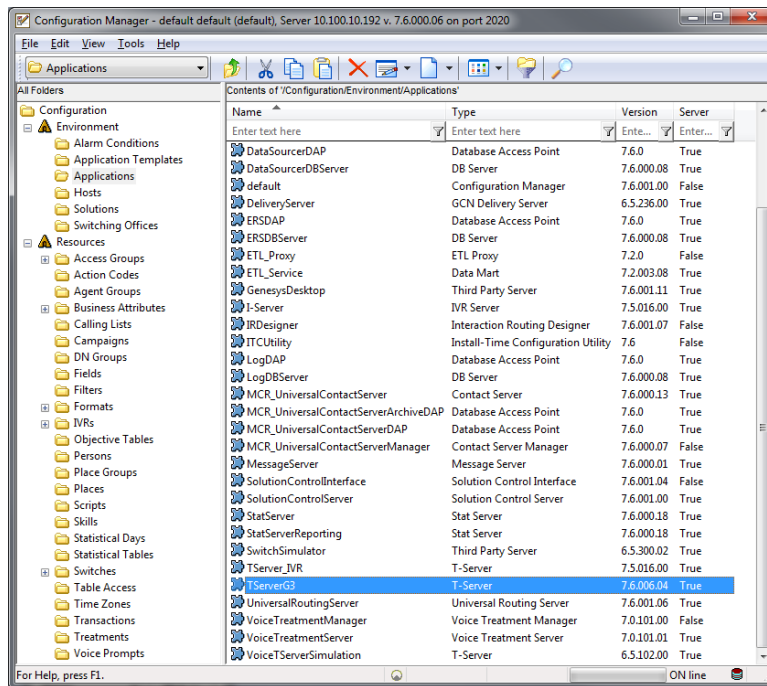

4. Select the **Options** tab and then select **link-tcp** from the drop-down list.

5. Verify the following information is complete and correct:

   ▪ **Hostname:** IP Address of the switch

   ▪ **Link-number:** Link number to the switch

   ▪ **Port:** TCP Port number on which the switch communicates

After you complete this procedure, return to the Customer Configuration Overview.

Verify T-Server Licensing

Typically, Genesys requires that you obtain and load right-to-monitor licenses for NICE Uptivity to properly monitor all devices that are to be recorded. For related information, see Licensing.
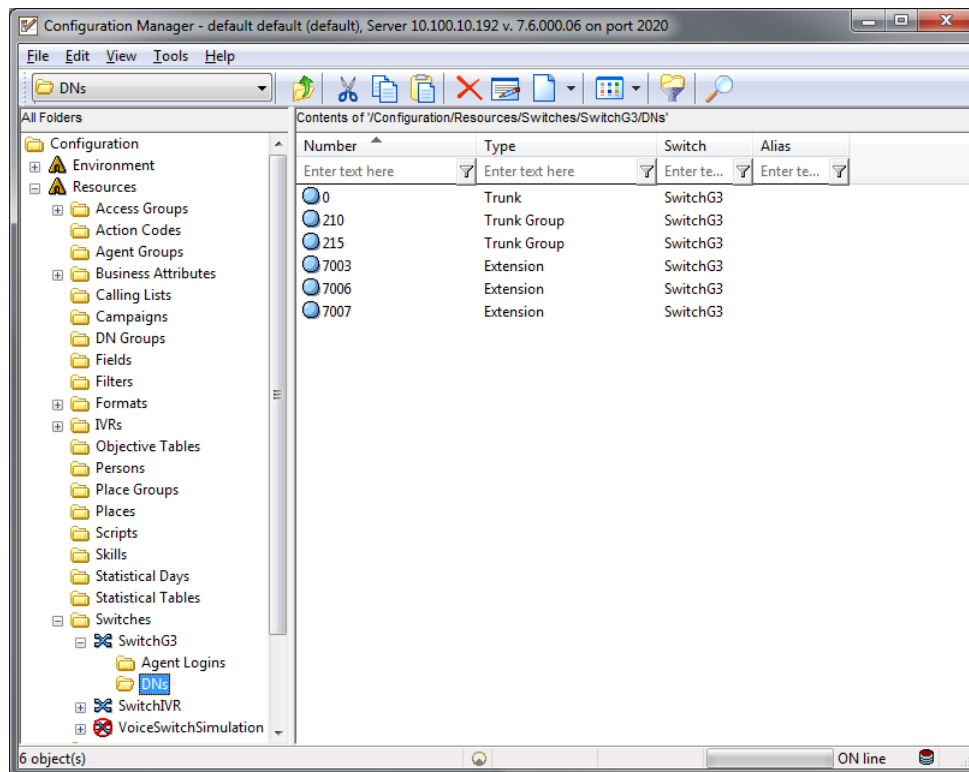
1. Open the **Genesys Configuration Manager**, and expand the **Environment** tree on the left-hand pane, then select the **Applications** folder.

2. From the **Applications** list, right-click the Genesys T-Server application that will be used for the integration and click **Properties**.

3. Select the **Options** tab and then select **License** from the drop-down list.

4. Verify the **num-tdn-licenses** value is correct (one per device to be monitored).

5. Verify the **num-sdn-licenses** value is correct (one per agent to be monitored).

After you complete this procedure, return to the Customer Configuration Overview.

Verify the DN List

Only DNs that are listed in the Genesys Configuration Manager for the appropriate switch will be available for monitoring by NICE Uptivity.

1. Open the **Genesys Configuration Manager**, and expand the **Resources** tree on the left pane.

2. Expand the **Switches** folder and click the appropriate switch.

3. Click the DNs folder to display its contents in the right pane.

Customer Administration Tasks

During ongoing use of the system, your Uptivity administrator may need to configure new channels or reconfigure existing channels. This integration can work with either TDM (using Ai-Logix cards), passive VoIP (using port mirroring), or active VoIP (using PBX-specific methods) as an audio source. If you add or reconfigure channels, you will need to follow any procedures specific to those audio sources as found in the appropriate customer guides.

You will also need to edit the CTI monitors in the Genesys T-Server **CTI Module** if you add to or change the devices that are monitored by NICE Uptivity. This integration supports using either devices or PBX groups as CTI monitors.

For more information on configuring CTI monitors, search online help for keyword *cti monitor*.

Document Revision History

Revision	Change Description	Effective Date
0	Initial version for this release	2016-06-14
1	Rebranded for NICE Uptivity.	2017-05-23

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