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See **Change Log** for summary of changes.



Interaction Director

Installation and Configuration Guide

Abstract

This document provides the requirements and procedures to install Interaction Director. It also content introducing the interfaces of Interaction Director and basic configuration.

For the latest version of this document, see the PureConnect Documentation Library at: <http://help.genesys.com/pureconnect>.

For copyright and trademark information, see https://help.genesys.com/pureconnect/desktop/copyright_and_trademark_information.htm.

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Introduction to Interaction Director

Interaction Director is a client/server solution that enhances CIC servers to route calls, emails, and faxes to the location that can handle them the best. This content describes how to set up a dedicated Interaction Director server and how to configure existing CIC servers so that Director can monitor them. Interaction Director is compatible with CIC 3.0, CIC 4.0, and subsequent servers (for example, CIC 2015 R1 or later) only. It is not compatible with older CIC versions, or with any version of EIC.

The *Interaction Director Installation and configuration Guide* is for Genesys partners, PureConnect administrators, and anyone who wants to install and configure Interaction Director and monitored CIC servers. Before installing the software, see the *Interaction Director Concepts Technical Reference* at

https://help.genesys.com/cic/mergedProjects/wh_tr/desktop/pdfs/interaction_director_concepts_tr.pdf. It provides essential background information about Interaction Director.

Terms to know

- **Interaction Director Server:** A dedicated server that monitors CIC servers to route calls based on pre-defined configurations and rules. To implement switchover, set up primary and secondary Director servers instead of a single Director server with no redundancy.
- **Monitored CIC Server:** Any CIC server that an Interaction Director server monitors.
- **Interaction Director:** Interaction Director product, which includes one active Director server and one or more monitored CIC servers.

Pre-installation requirements

Complete the following before installing Interaction Director:

- Establish a Windows Server administrator account for the Director server.
- Copy the Director license file.
- Review the [Director Server Installation Checklist](#).

Director Server Installation Checklist

Use this checklist to install and configure the Director server.

1. Before proceeding, verify that your hardware server meets the server requirements. For more information about hardware requirements, see https://help.genesys.com/cic/mergedProjects/wh_tr/mergedProjects/wh_tr_installation_and_configuration/desktop/hardware_requirements.htm. You also need a Director Server license file, which is similar to a CIC license except that it requires the Number of Director Monitored Servers to be greater than or equal to 1.
2. Download Interaction Director .iso file (which contains Director.msi, DirectorAdmin.msi, and DirectorDatabaseLogging.msi) from the Interaction Director section of the Downloads site at <https://help.genesys.com/pureconnect/secure/Downloads.aspx>. Save these files together on a local or USB drive. The Director.msi copies DirectorAdmin.msi to a share on the Director server. Do not save these files on a network share.
3. On the Director server, [Set up Interaction Director Database Logging](#).
4. Install Director server with or without switchover.

Need Switchover?	Director Server Install Procedure
No	Install Director Server Without Switchover Later, if you want to reconfigure your Director server for switchover, follow these procedures: <ol style="list-style-type: none">a. Reconfigure Director Server as Primary in a Switchover Pairb. Reconfigure Director Server as Secondary in a Switchover Pair
Yes	<ol style="list-style-type: none">a. Install Primary Director Server in a Switchover Pair.b. Install Secondary Director Server in a Switchover Pair.

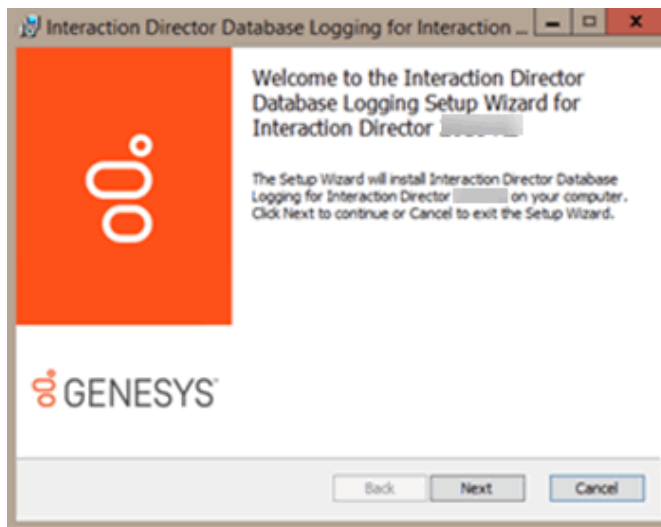
5. [Configure Director Server](#).
6. [Define Monitored Servers](#) to specify which CIC servers for Director to monitor.
7. [Define connections between Monitored Servers](#) so that interactions can route between them.
8. [Define Queue Objects](#) on the Interaction Director server that correspond to site and queue combinations at each monitored site.
9. [Define Enterprise Groups](#) (including skills and routing criterion) and assign queues to them.
10. (Optional) [Install Director Administration Tools on Desktop Computers](#). This install is for system administrators and handler developers. The programs it installs are on the Director server already.
11. Proceed to the [Monitored Server Installation Checklist](#).

Set up Interaction Director Database Logging

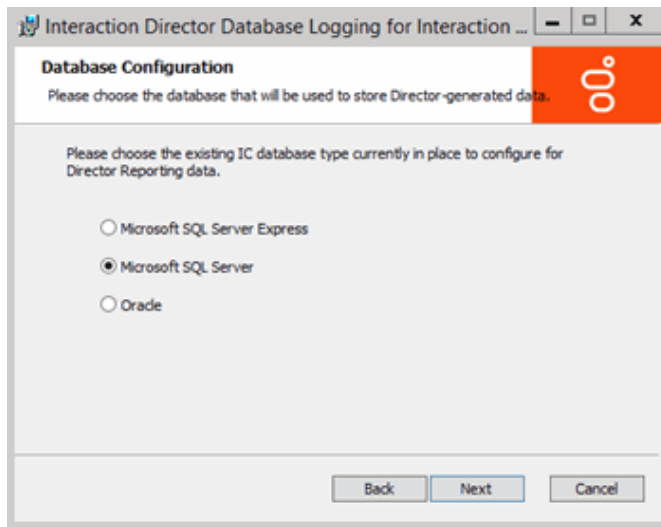
Use the **Interaction Director Database Logging Setup** wizard to configure Director server to store Director data in a single centralized database, regardless of the number or location of Monitored Servers. Use this procedure to configure PMQ logging and the database tables. You can run this wizard before or after the Interaction Director server install.

To set up Interaction Director Logging

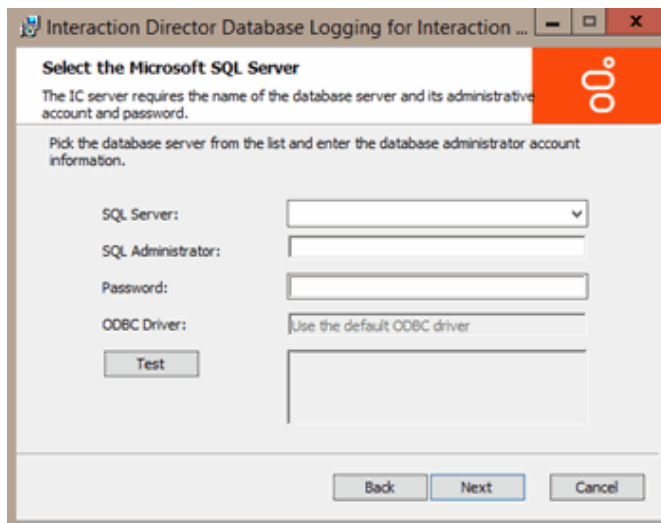
1. On the computer dedicated as the Director server, run DirectorDatabaseLogging.msi.
2. Click Run. The **Welcome** page of the **Interaction Director Database Logging Setup** wizard appears.



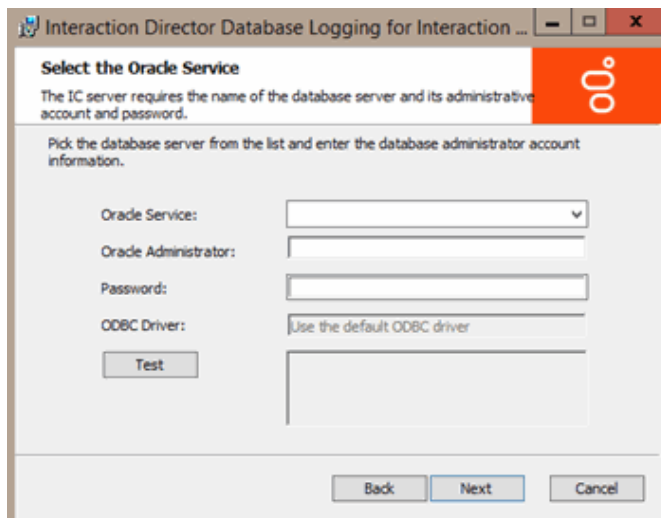
3. Click Next. The **Database Configuration** page appears.



4. Click the database type that CIC uses and then click **Next**.
5. If you selected **SQL Server**, do the following:



- a. In the **SQL Server** list box, click the database server that CIC uses.
 - b. In the **SQL Administrator** and **Password** boxes, type the administrative credentials to use to access that server with administrative permissions.
6. If you selected **Oracle**, do the following:



- a. In the **Oracle Service** list box, click the name of the Oracle service that you configured previously.

- b. In the **Oracle Administrator** and **Password** boxes, type the administrative credentials to use to access that server with administrative permissions.
7. Click **Test**. The system verifies the information.
8. If the test succeeds, click **Next**; otherwise, correct the information and test again.
9. If you selected **SQL Server**, do the following:

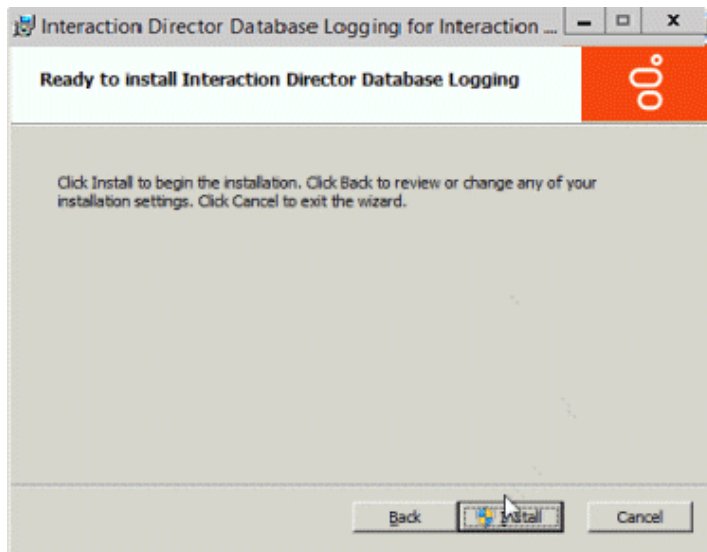
The screenshot shows a dialog box titled "Interaction Director Database Logging for Interaction ...". The main heading is "Update the IC Database for Director" with a sub-note: "The IC Database is where all Director-generated data will be stored." Below this, there are three input fields: "Enter the name of an existing IC Server or later database to update. This will be the schema name if the target database..." (empty), "Enter the credentials for the IC Database Administrator:" (with sub-fields for "Account Name:", "Password:", and "Confirm:" all empty), and three buttons at the bottom: "Back", "Next", and "Cancel".

- a. In database name box, type the name of the database to update.
- b. In the **Account Name**, **Password**, and **Confirm** boxes, type the CIC database administrator credentials to use to access that server with administrative permissions and then click **Next**. This account needs full database permissions on the server.
10. If you selected **Oracle**, do the following:

The screenshot shows the same dialog box as above, but with additional fields for Oracle configuration. The "Enter the name of an existing IC Server or later database to update..." field now contains "i3_IC_DIR". Below it are two more fields: "Enter the name of the Tablespace that will be used for the DATA:" (empty) and "Enter the name of the Tablespace that will be used for the INDEX:" (empty). The "Account Name" field now contains "i3_IC_Admin", and the "Password" and "Confirm" fields are masked with "••". The "Back", "Next", and "Cancel" buttons are still at the bottom.

- a. In the schema name box, type the name of the Oracle database schema.
- b. In the **Tablespace** boxes, type the names of the tablespaces used for data and indexing.
- c. In the **Password** and **Confirm** boxes, type the Database Administrator Schema account password and then click **Next**. The system uses the schema name as the account name, so you don't have to provide it.

The system validates the information and determines whether the database specified is a CIC 4.0 or later database. The minimum CIC version for a Director 4.0 database is 4.0. The **Ready to Install Interaction Director Server** page appears.



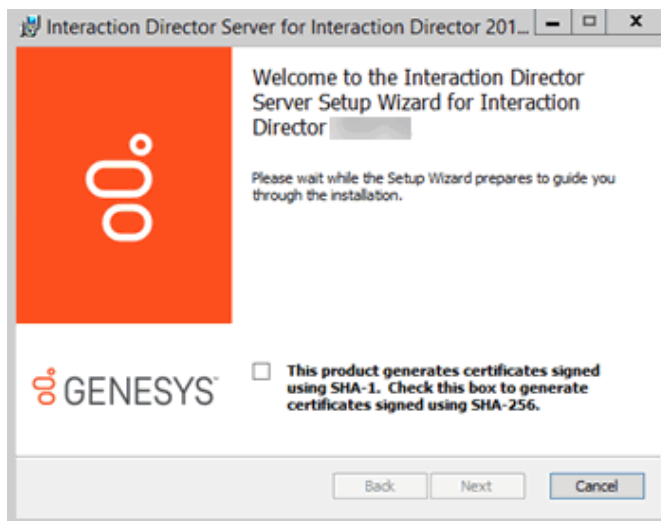
11. Click **Install**. The wizard displays a progress bar as it installs Interaction Director Database Logging.
12. When installation completes, click **Finish**.
13. If asked to restart the server, click **Yes**.

Install Director Server Without Switchover

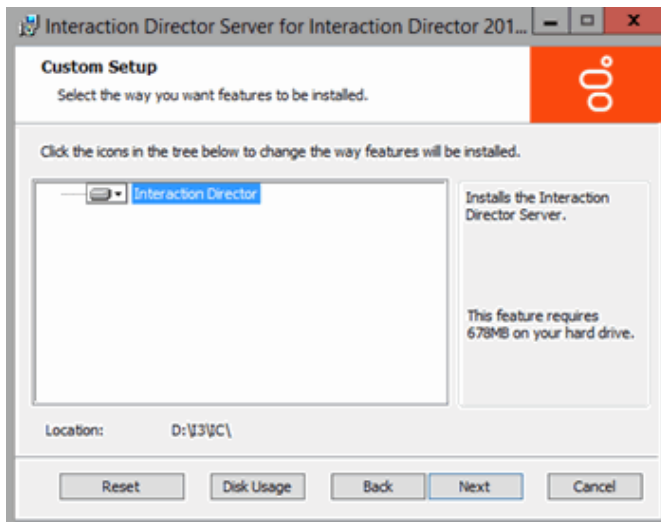
Use the **Interaction Director Server Setup** wizard to install Director server as a stand-alone server without switchover redundancy. The installation includes Director components, Interaction Administrator, and Interaction Designer. It creates a share on the Director server that contains an install for Interaction Administrator and Interaction Designer. This share makes it easy for handler designers and system administrators to install those programs on client computers. If you require switchover, see [Install Primary Director Server in a Switchover Pair](#) and [Install Secondary Director Server in a Switchover Pair](#).

To install Director Server without switchover:

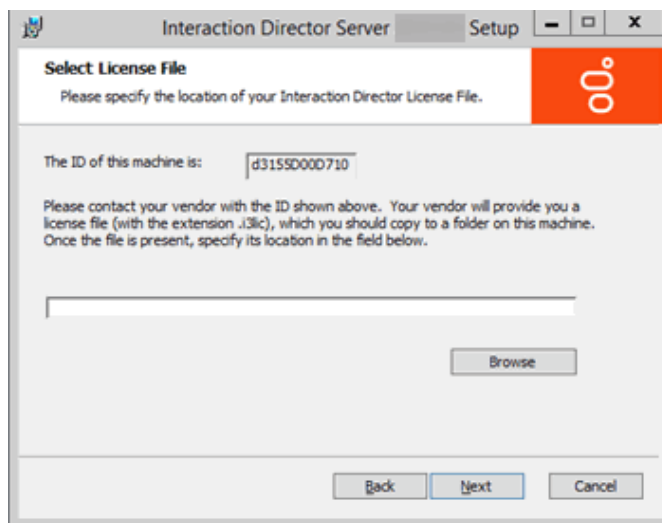
1. Run **Director.msi**. The **Welcome** page of the **Interaction Director Server Setup** wizard appears.



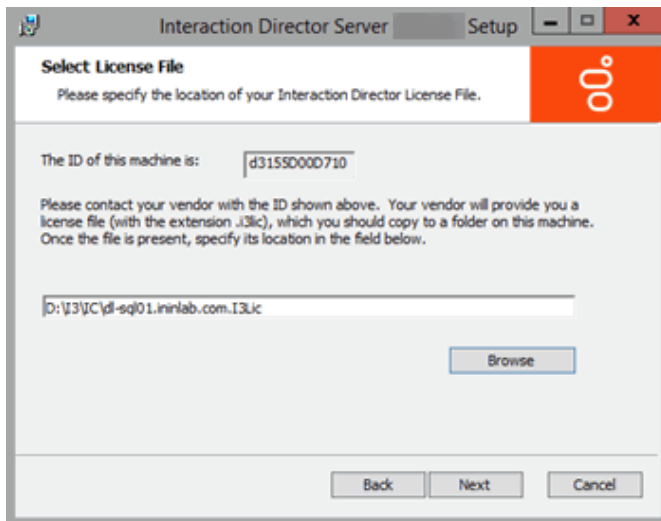
2. Click **Next**. The **Custom Setup** page appears.



3. Click **Next**. The **Select License File** page appears. It displays the ID of the Director server.



4. Click **Browse**. The **Open** dialog box appears.
5. Click the Director license file and then click **Open**.



6. Verify that the correct license file appears and then click **Next**. The **Domain User Validation** page appears.

7. Do the following:
 - a. In the **User** box, type the ID of the Director administrator.
 - b. In the **Password** box, type the numeric password for the Director administrator. If you are in a secure location where no unauthorized people can see your screen, select the **Display Password in Clear Text** check box so that you can see what you're typing.
 - c. In the **Domain** box, type the name of the domain for Director to work in and then click **Next**. The **CIC Site Name** page appears.

8. Do the following:
 - a. In the **Site Name** box, type a name for your Director server. This name is whatever you choose.
 - b. In the **Site ID** box, type a unique number (between 0 and 999) not assigned to any other Director or CIC server in your organization.

Note:

Assign a unique Site ID to the Director server and ensure that every CIC server in the environment has a unique Site ID.

- c. Click **Next**. The **Switchover Information** page appears. This page prompts for optional switchover details. In this installation scenario, switchover is not a requirement.

Switchover Information
Please provide Switchover system information

☐ This server is part of a Switchover Pair
This machine is acting as a:

☒ Active Switchover Server
☐ Backup Switchover Server

Enter the hostname of the other Director Server in the pair.

Server Group Certificate Path

Server Group Private Key Path

9. Click **Next**. The **Director User Account Creation** page appears.

Director User Account Creation
Creates an IC account for Director to use.

This is a user account that you will need to run administrative applications such as Designer and Administrator against the Director server.

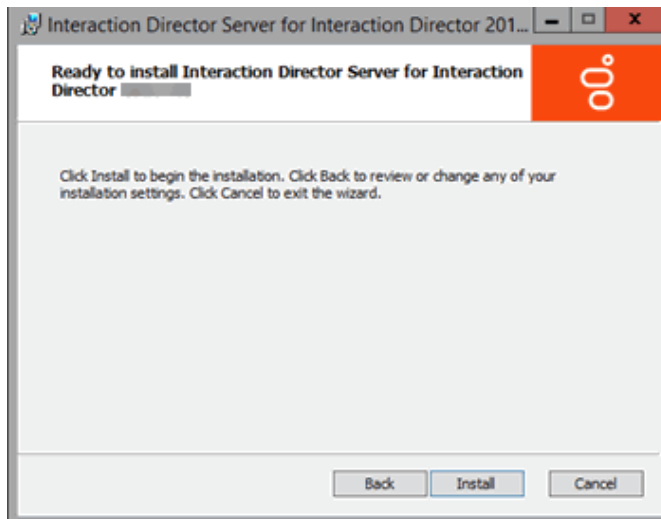
Account Name:

Password:

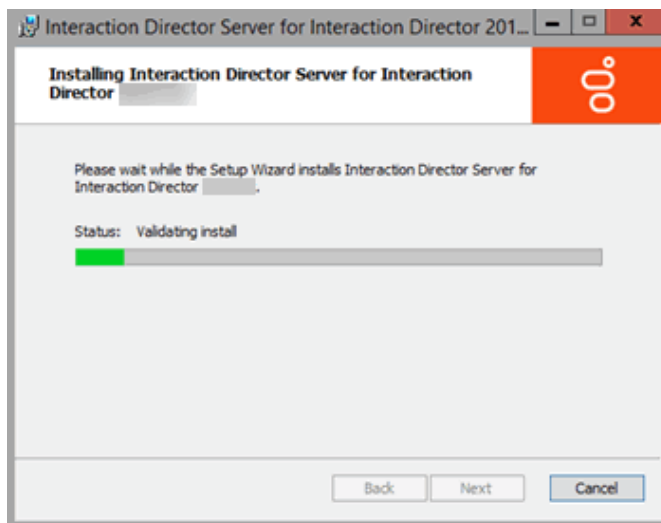
Confirm Password:

☐ Display Password in Clear Text

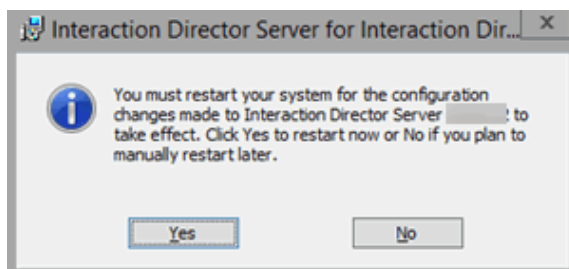
10. Do the following to establish a user ID and password for accessing the Director server later when using Interaction Designer or Interaction Administrator:
 - a. In the **Account Name** box, type the user ID for administrative applications (such as Interaction Designer and Interaction Administrator) to use on the Director server. The commonly used name is IDIR, but you can use any name that you want.
 - b. In the **Password** box, type the password for administrative applications to use. If you are in a secure location, select the **Display Password in Clear Text** check box so that you can see what you are typing.
 - c. In the **Confirm Password** box, retype the password.
 - d. Click **Next**. The **Ready to Install Interaction Director Server** page appears.



11. Click **Install**. The wizard displays a progress bar as it installs Director.



12. When installation completes, click **Finish**. The **Interaction Director Server Setup** dialog box appears.



13. Click **Yes**. The Director server is not ready for use until after it restarts.

14. After the server restarts, log on using the specified domain credentials. Interaction Director server is ready for use.

Installation does not add icons to the desktop, but the following shortcuts appear under **Start > All Programs > Interactive Intelligence**:

• Interaction Administrator	• Switchover Control Panel
• Interaction Designer	• Log Viewer
• Trace Configuration Utility	• Online Documentation

Note:

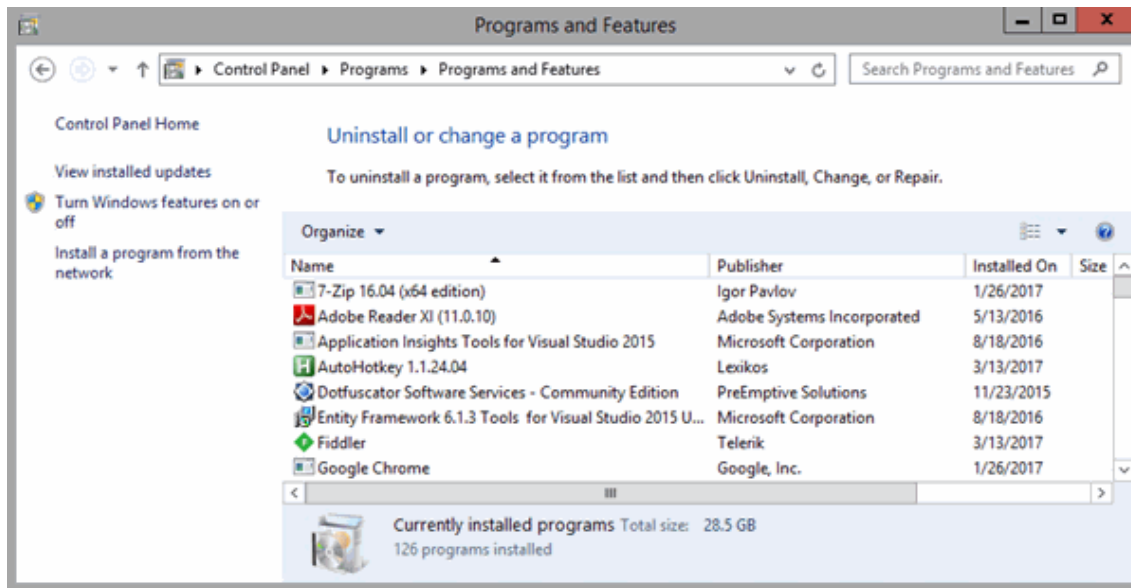
When Interaction Administrator runs against a Director server, it displays Interaction Director containers only, and not the full set of containers for configuring CIC. For more information about Director containers in Interaction Administrator, see [Interaction Director Containers](#).

Reconfigure Director Server as Primary in a Switchover Pair

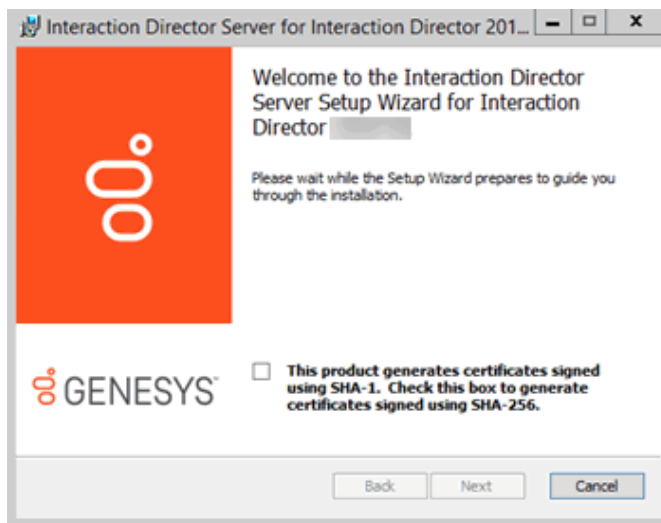
Use the **Interaction Director Server Setup** wizard to reconfigure a stand-alone Director server to a primary server in a switchover pair. After configuring the primary server, follow the instructions to [Reconfigure Director Server as Secondary in a Switchover Pair](#).

To reconfigure Director Server as primary in a switchover pair

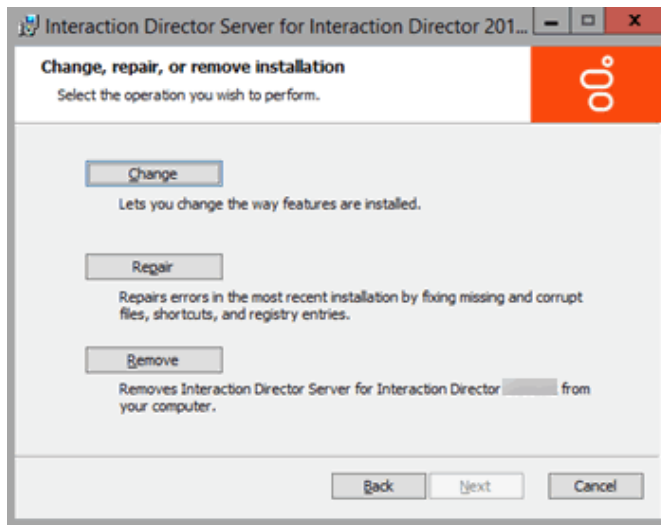
1. On the Director server, click **Start > Control Panel > Add/Remove Programs**.



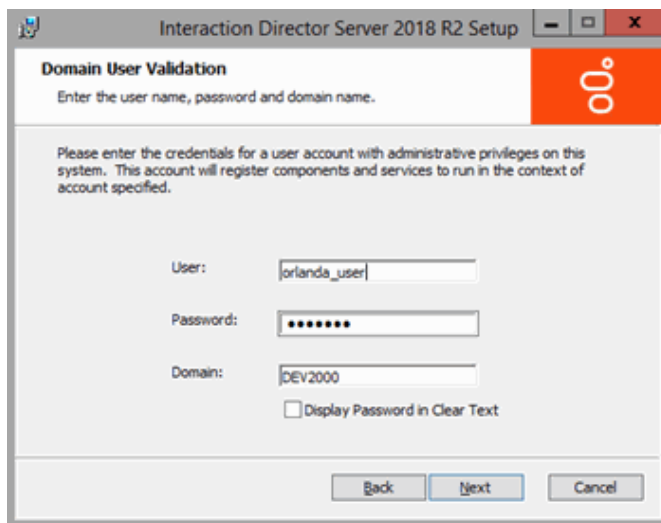
2. Click **Interaction Director Server** and then click **Change**. The **Welcome** page of the **Interaction Director Server Setup** wizard appears.



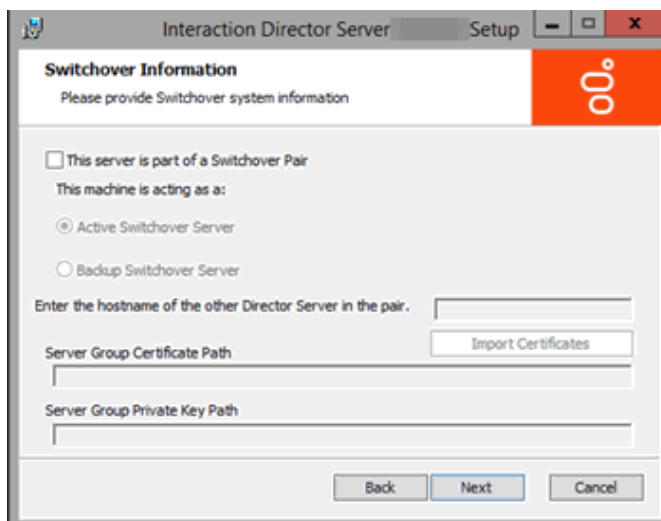
3. Click **Next**. The **Change, repair or remove installation** page appears.



4. Click **Change**. The **Domain User Validation** page appears.

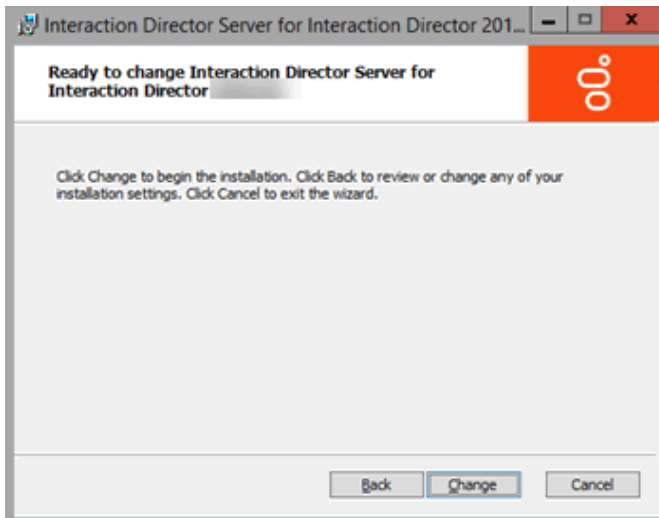


5. Click **Next**. The **Switchover Information** page appears.

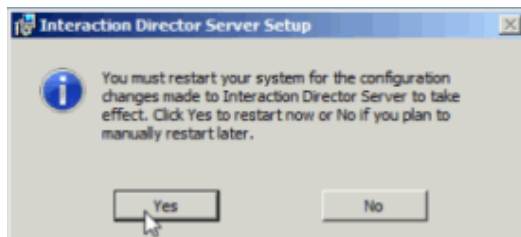


6. Do the following:
 - a. Select **This server is part of a Switchover Pair**.
 - b. Click **Active Switchover Server**.
 - c. In the **Enter the hostname of the other Director Server in the pair** box, type the host name (Windows machine or Netbios name) of the **secondary** (backup) server.

- Click **Next**. The **Ready to change Interaction Director Server** page appears.



- Click **Change**. During installation, the system updates certificates, private keys, and registry settings so that Switchover can identify the backup server.
- When installation completes, click **Finish**. The **Interaction Director Server Setup** dialog box appears.



- Click **Yes**. The switchover settings aren't in effect until after the Director server restarts.
- After the server restarts, log on using the same domain credentials. This Interaction Director server is now the primary server in a switchover pair.
- Click **Start > All Programs > Interactive Intelligence > Switchover Control Panel**.
- The **Switchover Control Panel** appears. If the name of the primary (active) Director server appears, the primary Switchover Server implemented correctly. There isn't a secondary (backup) server listed since you haven't configured it yet.



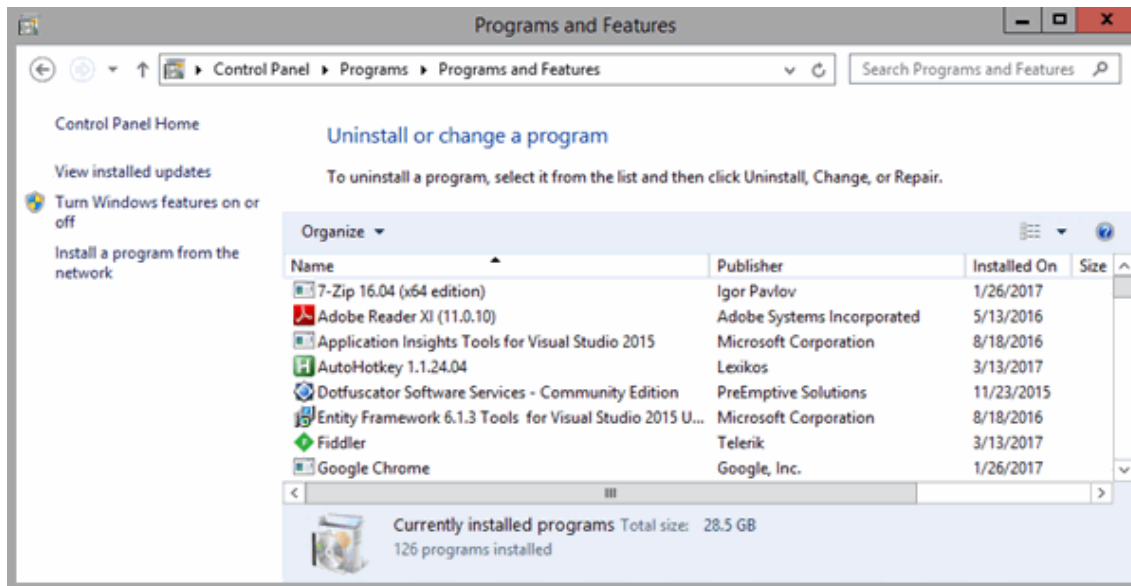
- Click **Exit**.
- Complete the steps to [Reconfigure Director Server as Secondary in a Switchover Pair](#).

Reconfigure Director Server as Secondary in a Switchover Pair

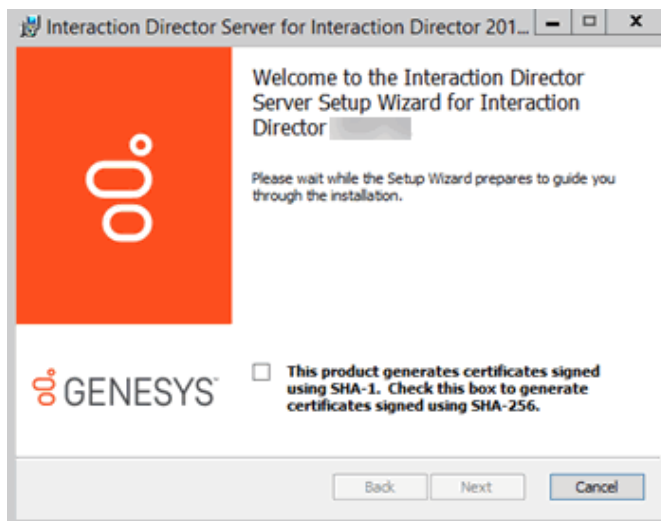
Use the **Interaction Director Server Setup** wizard to reconfigure a stand-alone Director server to a secondary (backup) server in a switchover pair. Before configuring the secondary server, complete the steps to [Reconfigure Director Server as Primary in a Switchover Pair](#).

To reconfigure Director Server as secondary in a switchover pair

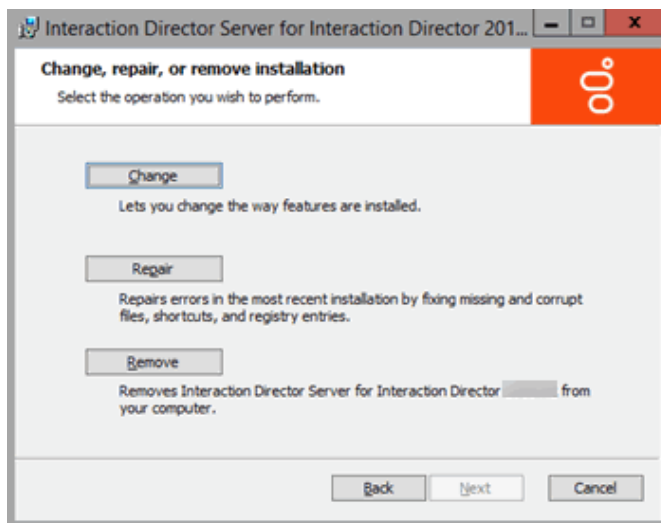
- Copy **ServerGroupCertificate.cer** and **ServerGroupPrivateKey.bin** from the `\i3\Director\Certificates\ServerGroup` directory to a USB drive, CD, or other media that this computer can access. Do not copy files to a network path as it can cause issues when importing files.
- On the secondary Director server in the switchover pair, click **Start > Control Panel > Add/Remove Programs**.



3. Click **Interaction Director Server** and then click **Change**. The **Welcome** page of the **Interaction Director Server Setup** wizard appears.



4. Click **Next**. The **Change, repair or remove installation** page appears.



5. Click **Change**. The **Domain User Validation** page appears.

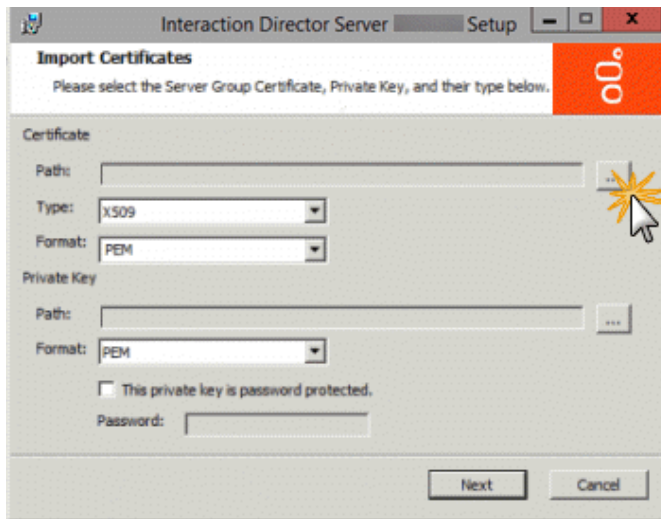
6. Click **Next**. The **Switchover Information** page appears.

7. Do the following:
 - a. Select **This server is part of a Switchover Pair**.
 - b. Click **Backup Switchover Server**.
 - c. In the **Enter the hostname of the other Director Server in the pair** box, type the host name (Windows machine or Netbios name) of the **primary** server.

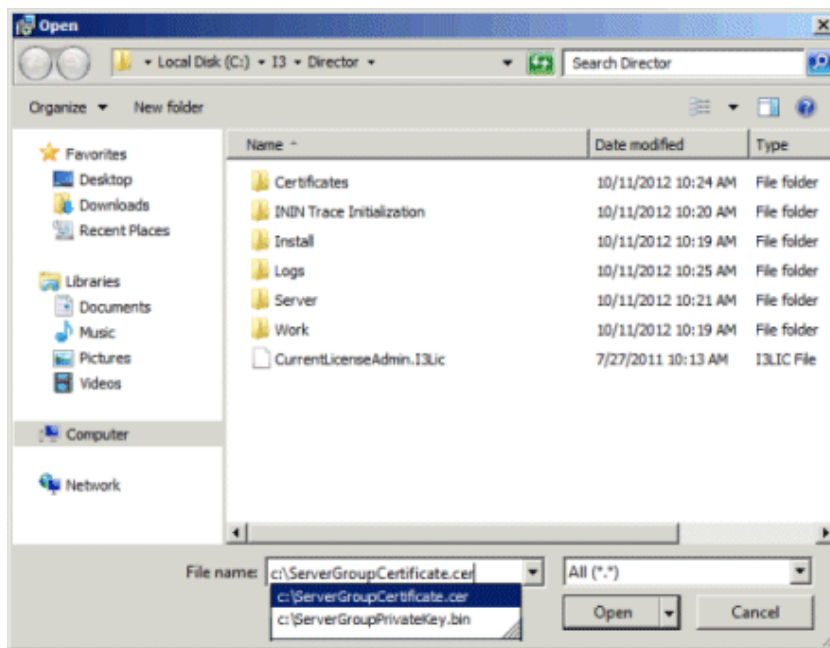
Note:

Before completing the next step, ensure that you copied the "ServerGroupCertificate.cer" and "ServerGroupPrivateKey.bin" files from the "i3\Director\Certificates\ServerGroup" directory to a USB drive, CD, or other media that this computer can access.

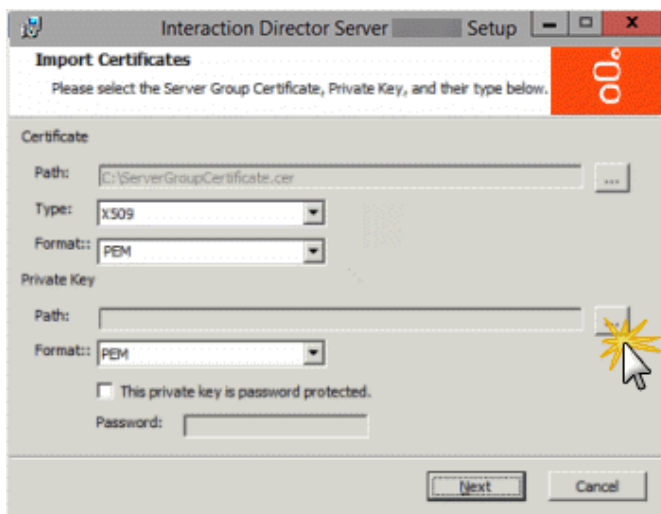
8. Do the following:
 - a. Click **Import Certificates**. The **Import Certificates** page appears.



- b. In the **Certificate** section, click the ellipsis (...) next to the **Path** box. The **Open** dialog box appears.



- c. Click the **ServerGroupCertificate.cer** file and then click **Open**. Don't change the values in the **Type** and **Format** list boxes.



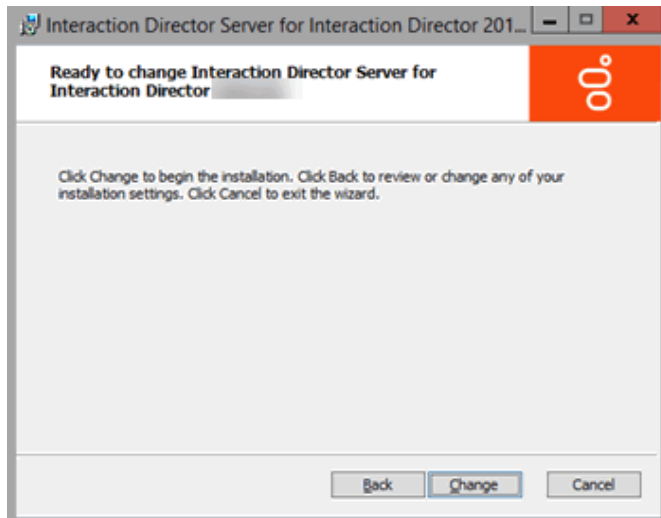
- d. In the **Private Key** section, click the ellipsis (...) next to the **Path** box.
 e. In the **Open** dialog box, click the **ServerGroupPrivateKey.bin** file and then click **Open**.

- f. To establish a password for the private key, select **This private key is password protected** and in the **Password** box, type a numeric password.

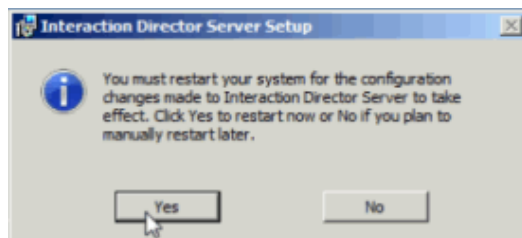
Note:

Verify that the paths to the .cer and .bin files are not network paths. If network paths display, copy the files to a local folder and reselect the paths.

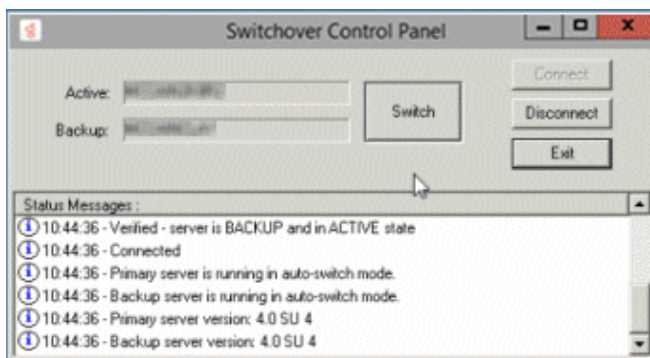
- g. Click **Next**. The **Ready to change Interaction Director Server** page appears.



9. Click **Change**. During installation, the system updates certificates, private keys, and registry settings so that Switchover can identify the primary server.
10. When installation completes, click **Finish**. The **Interaction Director Server Setup** dialog box appears.



11. Click **Yes**. The switchover settings aren't in effect until after the Director server restarts.
12. After the server restarts, log on using the same domain credentials.
13. Click **Start > All Programs > Interactive Intelligence > Switchover Control Panel**.
14. The **Switchover Control Panel** appears. If the names of the primary (active) and secondary (backup) Director servers appear, the Switchover Server implemented correctly.



15. Click **Exit**.

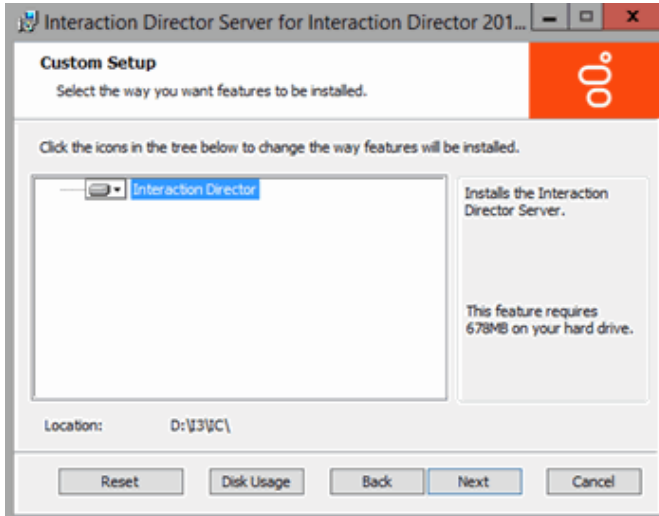
Install Primary Director Server in a Switchover Pair

Use the **Interaction Director Server Setup** wizard to install Director server as the primary server in a switchover pair. After installing the primary Director server, complete the steps to [Install Secondary Director Server in a Switchover Pair](#). If you don't require switchover, see [Install Director](#).

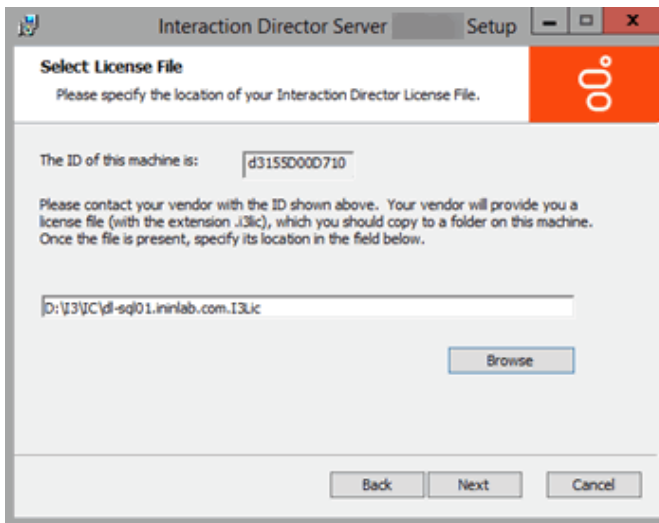
Server Without Switchover.

To install a primary Director server in a switchover pair

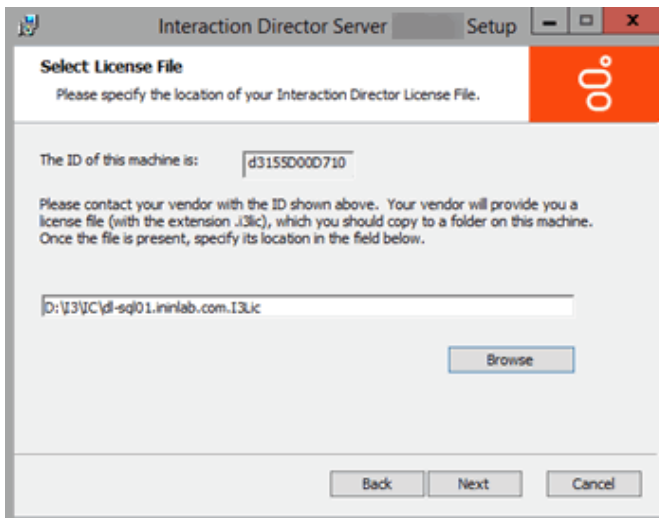
1. On the primary Director server in the switchover pair, run Director.msi. The **Welcome** page of the **Interaction Director Server Setup** wizard appears.
2. Click **Next**. The **Custom Setup** page appears.



3. Click **Next**. The **Select License File** page appears. It displays the ID of the Director server.



4. Click **Browse**. The **Open** dialog box appears.
5. Click the Director license file and then click **Open**.



6. Verify that the correct license file appears and then click **Next**. The **Domain User Validation** page appears.

7. Do the following:
 - a. In the **User** box, type the ID of the Director administrator.
 - b. In the **Password** box, type the numeric password for the Director administrator. If you are in a secure location where no unauthorized people can see your screen, select the **Display Password in Clear Text** check box so that you can see what you're typing.
 - c. In the **Domain** box, type the name of the domain for Director to work in.
 - d. Click **Next**. The **CIC Site Name** page appears.

8. Do the following:
 - a. In the **Site Name** box, type a name for your Director server. This name is whatever you choose.
 - b. In the **Site ID** box, type a unique number (between 0 and 999) not assigned to any other Director or CIC server in your organization.

Note:

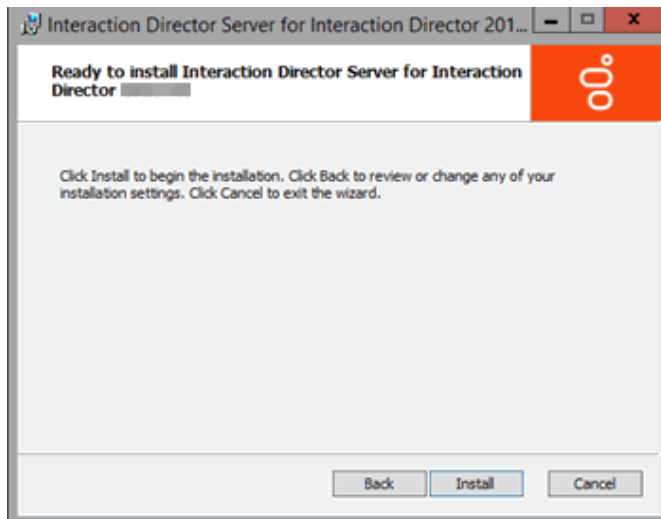
Assign a unique Site ID to the Director server and ensure that every CIC server in the environment has a unique Site ID.

- c. Click **Next**. The **Switchover Information** page appears.

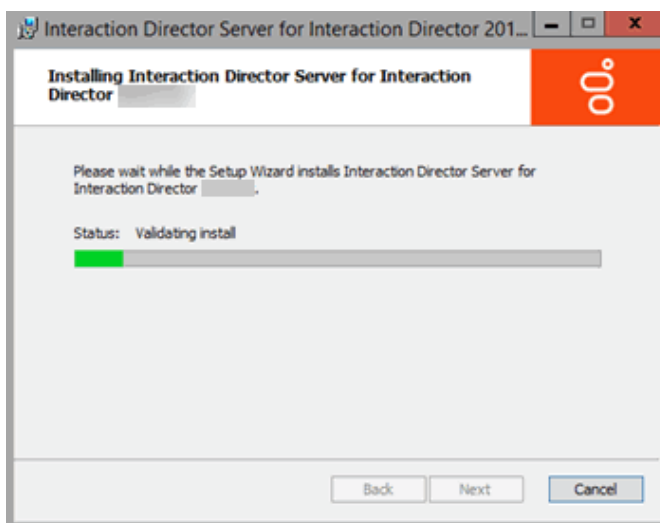
9. Do the following:
 - a. Select **This server is part of a Switchover Pair**.
 - b. Click **Active Switchover Server**.
 - c. In the **Enter the hostname of the other Director Server in the pair** box, type the host name (Windows machine name) of the **secondary** (backup) server and then click **Next**.

The Director User Account Creation page appears.

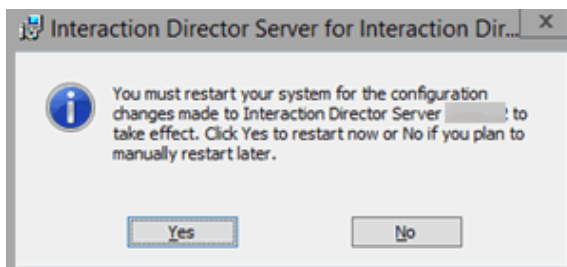
10. Do the following to establish a user ID and password for accessing the Director server later when using Interaction Designer or Interaction Administrator:
 - a. In the **Account Name** box, type the user ID for administrative applications (such as Interaction Designer and Interaction Administrator) to use on the Director server. The commonly used name is IDIR, but you can use any name that you want.
 - b. In the **Password** box, type the password for administrative applications to use. If you are in a secure location, select the **Display Password in Clear Text** check box so that you can see what you are typing.
 - c. In the **Confirm Password** box, retype the password and then click **Next**. The **Ready to Install Interaction Director Server** page appears.



11. Click **Install**. The wizard displays a progress bar as it installs Director.



12. When installation completes, click **Finish**. The **Interaction Director Server Setup** dialog box appears.



13. Click **Yes**. The Director server is not ready for use until after it restarts.
14. After the server restarts, log on using the same domain credentials. Interaction Director server is ready for use. Installation does not add icons to the desktop, but the following shortcuts appear under **Start > All Programs > PureConnect**:

• Interaction Administrator	• Switchover Control Panel
• Interaction Designer	• Log Viewer
• Trace Configuration Utility	• Online Documentation

Note:

When Interaction Administrator runs against a Director server, it displays Interaction Director containers only, and not the full set of containers for configuring CIC. For more information about Director containers in Interaction Administrator, see [Interaction Director Containers](#).

15. Click **Start > All Programs > PureConnect > Switchover Control Panel**.
16. The **Switchover Control Panel** appears. If the name of the primary (active) Director server appears, the primary Switchover Server implemented correctly. There isn't a secondary (backup) server listed since you haven't configured it yet.



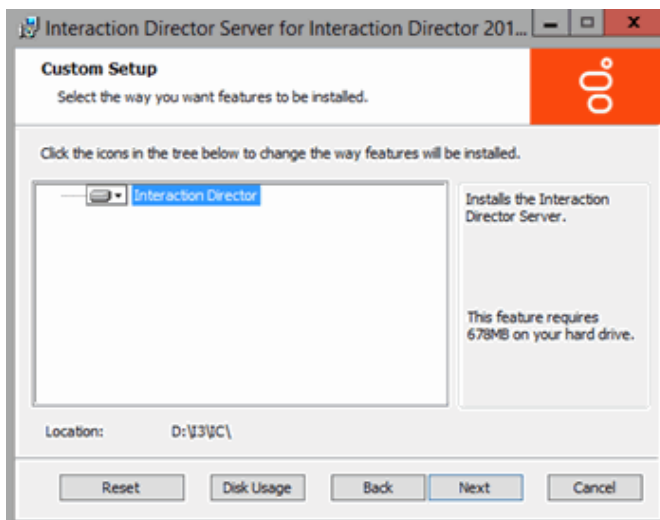
17. Click Exit.
18. Complete the steps to [Install Secondary Director Server in a Switchover Pair](#).

Install Secondary Director Server in a Switchover Pair

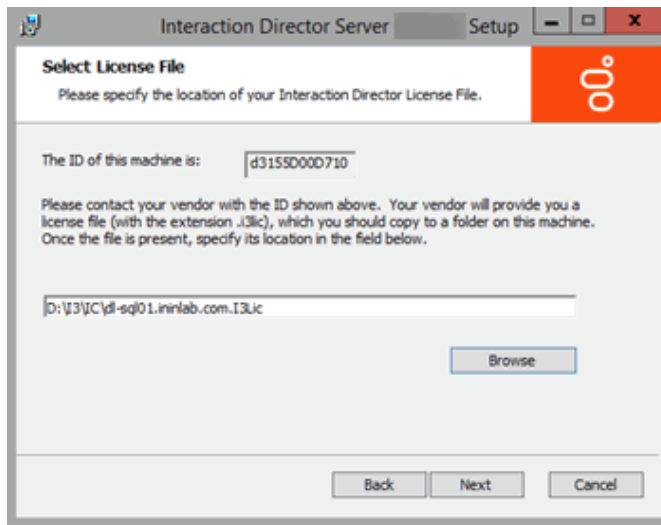
Use the **Interaction Director Server Setup** wizard to install Director server as the secondary (backup) server in a switchover pair. Before installing the secondary Director server, complete the steps to [Install Primary Director Server in a Switchover Pair](#). If you don't require switchover, see [Install Director Server Without Switchover](#).

To install a secondary Director server in a switchover pair

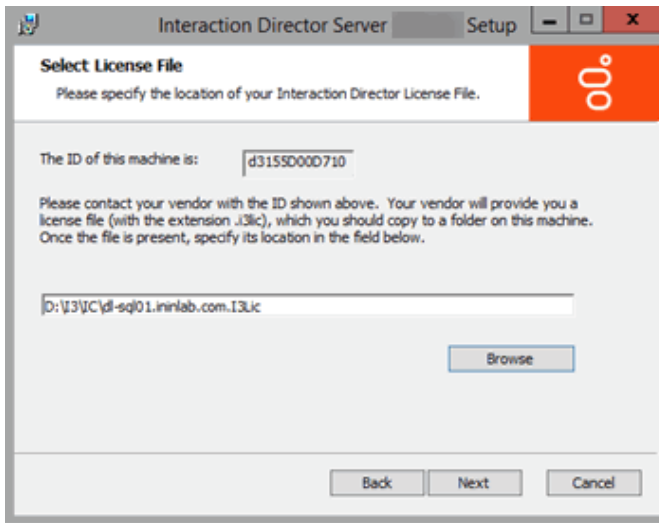
1. Copy "ServerGroupCertificate.cer" and "ServerGroupPrivateKey.bin" from the "%i3\Director\Certificates\ServerGroup" directory to a USB drive, CD, or other media that this computer can access. Do not copy files to a network path as it can cause issues when importing files.
2. On the secondary Director server in the switchover pair, run Director.msi. The **Welcome** page of the **Interaction Director Server Setup** wizard appears.
3. Click **Next**. The **Custom Setup** page appears.



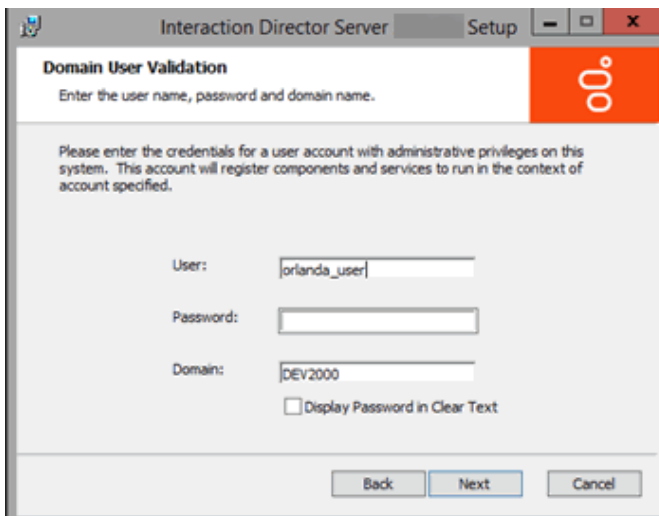
4. Click **Next**. The **Select License File** page appears. It displays the ID of the Director server.



5. Click **Browse**. The **Open** dialog box appears.
6. Click the Director license file and then click **Open**.



7. Verify that the correct license file appears and then click **Next**. The **Domain User Validation** page appears.



8. Do the following:
 - a. In the **User** box, type the ID of the Director administrator.
 - b. In the **Password** box, type the numeric password for the Director administrator. If you are in a secure location where no unauthorized people can see your screen, select the **Display Password in Clear Text** check box so that you can see what you're typing.

- c. In the **Domain** box, type the name of the domain for Director to work in.
- d. Click **Next**. The **CIC Site Name** page appears.

9. Do the following:
 - a. In the **Site Name** box, type a name for your Director server. This name is whatever you choose.
 - b. In the **Site ID** box, type a unique number (between 0 and 999) not assigned to any other Director or CIC server in your organization.

Note:

Assign a unique Site ID to the Director server and ensure that every CIC server in the environment has a unique Site ID.

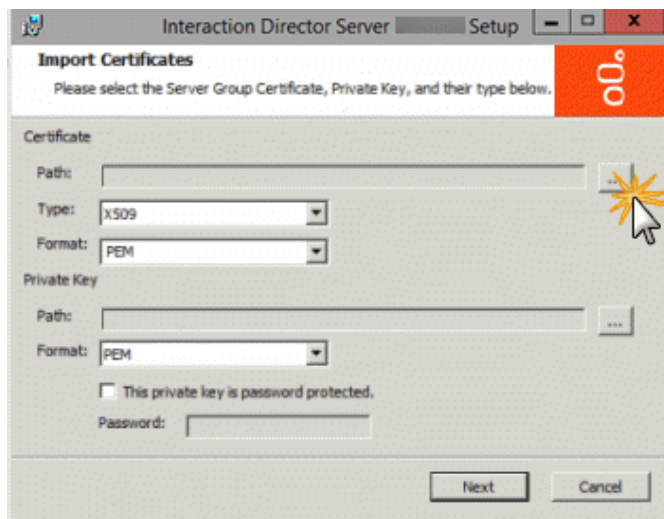
- c. Click **Next**. The **Switchover Information** page appears.

10. Do the following:
 - a. Select **This server is part of a Switchover Pair**.
 - b. Click **Backup Switchover Server**.
 - c. In the **Enter the hostname of the other Director Server in the pair** box, type the host name (Windows machine name) of the **primary** server.

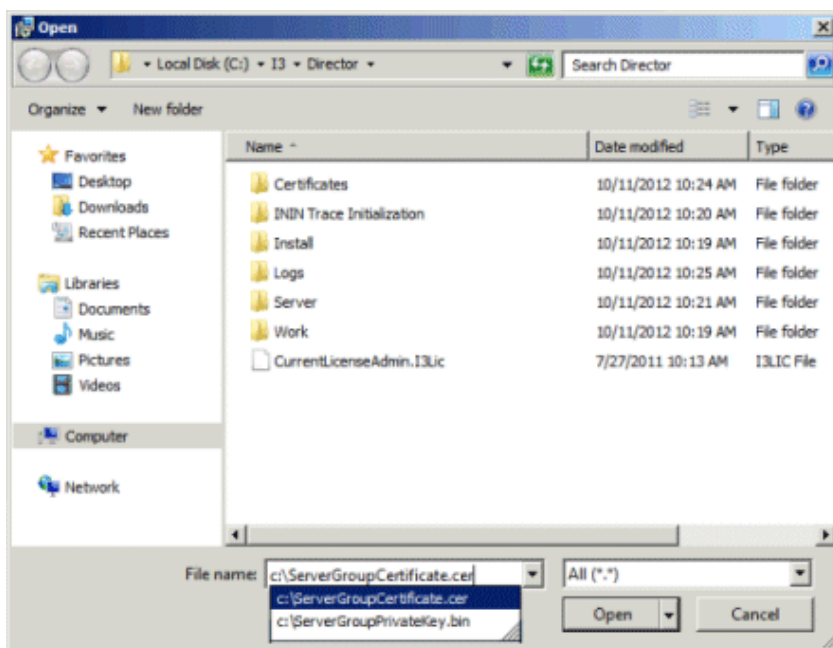
Note:

Before completing the next step, ensure that you copied the **ServerGroupCertificate.cer** and **ServerGroupPrivateKey.bin** files from the **\\i3\Director\Certificates\ServerGroup** directory to a USB drive, CD, or other media that this computer can access.

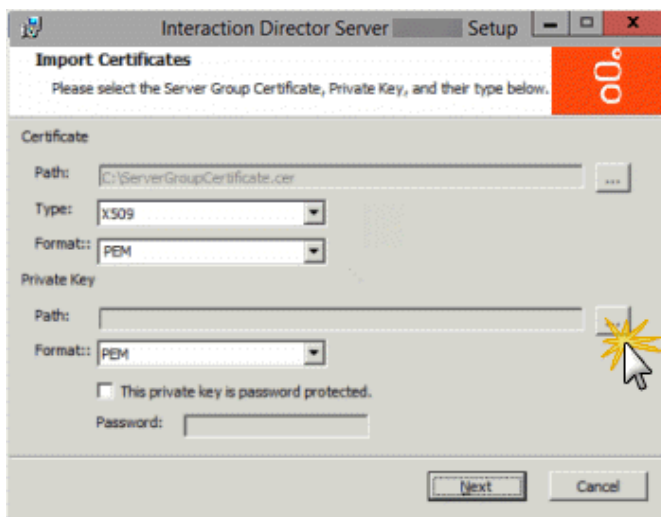
11. Click **Import Certificates**. The **Import Certificates** page appears.



12. In the **Certificate** section, click the ellipsis (...) next to the **Path** box. The **Open** dialog box appears.



13. Click the **ServerGroupCertificate.cer** file and then click **Open**. The **Import Certificates** page appears. Don't change the values in the **Type** and **Format** list boxes.

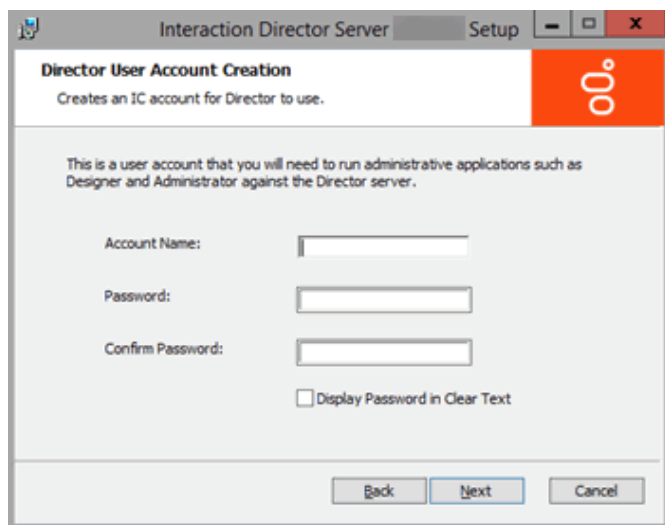


14. In the **Private Key** section, click the ellipsis (...) next to the **Path** box. The **Open** dialog box appears.
15. Click the **ServerGroupPrivateKey.bin** file and then click **Open**.
16. To establish a password for the private key, select **This private key is password protected** and in the **Password** box, type a numeric password.

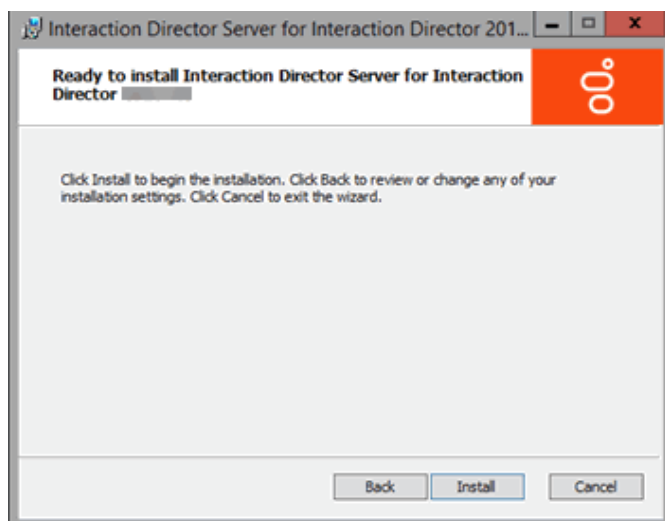
Note:

Verify that the paths to the .cer and .bin files are not network paths. If network paths display, copy the files to a local folder and reselect the paths.

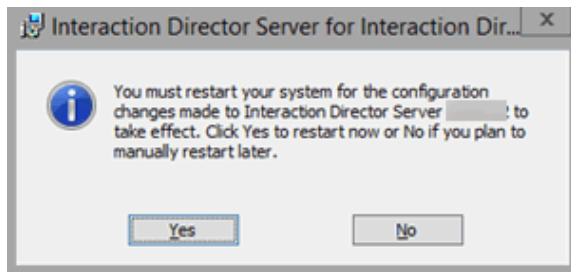
17. Click **Next**. The **Director User Account Creation** page appears.

The screenshot shows a window titled "Interaction Director Server Setup" with a sub-header "Director User Account Creation". Below the sub-header is a description: "Creates an IC account for Director to use." and a red logo. The main text states: "This is a user account that you will need to run administrative applications such as Designer and Administrator against the Director server." There are three input fields: "Account Name:", "Password:", and "Confirm Password:". Below the "Confirm Password:" field is a checkbox labeled "Display Password in Clear Text". At the bottom are three buttons: "Back", "Next", and "Cancel".

18. Do the following to establish a user ID and password for accessing the Director server later when using Interaction Designer or Interaction Administrator:
 - a. In the **Account Name** box, type the user ID for administrative applications (such as Interaction Designer and Interaction Administrator) to use on the Director server. The commonly used name is IDIR, but you can use any name that you want.
 - b. In the **Password** box, type the password for administrative applications to use. If you are in a secure location, select the **Display Password in Clear Text** check box so that you can see what you are typing.
 - c. In the **Confirm Password** box, retype the password.
 - d. Click **Next**. The **Ready to Install Interaction Director Server** page appears.

The screenshot shows a window titled "Interaction Director Server for Interaction Director 201..." with a sub-header "Ready to install Interaction Director Server for Interaction Director". Below the sub-header is a red logo. The main text states: "Click Install to begin the installation. Click Back to review or change any of your installation settings. Click Cancel to exit the wizard." At the bottom are three buttons: "Back", "Install", and "Cancel".

19. Click **Install**. The wizard displays a progress bar as it installs Director.
20. When installation completes, click **Finish**. The **Interaction Director Server Setup** dialog box appears.



21. Click **Yes**. The Director server is not ready for use until after it restarts.
22. After the server restarts, log on using the same domain credentials. Interaction Director server is ready for use.

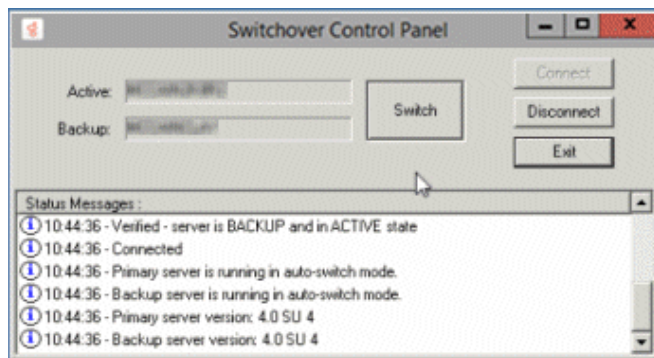
Installation does not add icons to the desktop, but the following shortcuts appear under **Start > All Programs > Interactive Intelligence**.

<ul style="list-style-type: none"> • Interaction Administrator • Interaction Designer • Trace Configuration Utility 	<ul style="list-style-type: none"> • Switchover Control Panel • Log Viewer • Online Documentation
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Note:

When Interaction Administrator runs against a Director server, it displays Interaction Director containers only, and not the full set of containers for configuring CIC. For more information about Director containers in Interaction Administrator, see [Interaction Director Containers](#).

23. Click **Start > All Programs > Interactive Intelligence > Switchover Control Panel**.
24. The **Switchover Control Panel** appears. If the names of the primary (active) and secondary (backup) Director servers appear, the Switchover Server implemented correctly.



25. Click **Exit**.
26. Complete the steps to [Install Secondary Director Server in a Switchover Pair](#).

Define Monitored Servers

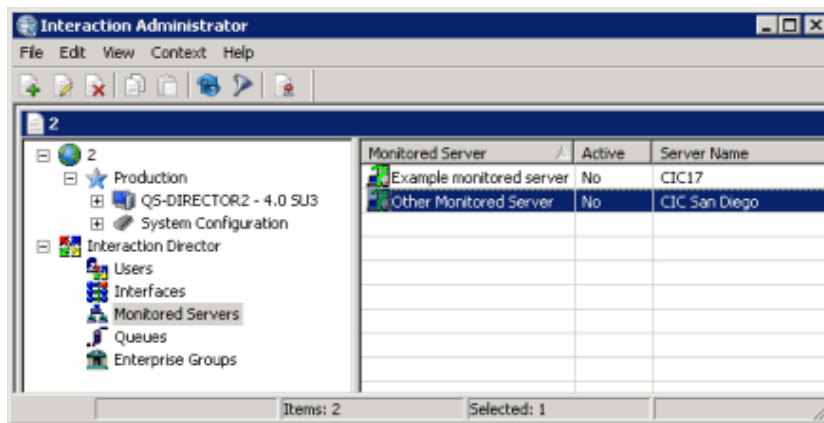
Use the **Monitored Server Configuration** dialog box in Interaction Administrator to define the Monitored Servers. The first step is to define the CIC sites to which Interaction Director can connect to receive routing requests and monitor destination queues.

Note:

An ACD queue without Director enabled has priority over an ACD queue with Director enabled. For example, suppose that an agent is a member of two ACD queues, one with Director enabled and the other without it. When the agent is in ACD Available status, then IC assigns ACD Wait calls in the non-Director queue before it assigns Director Wait calls in the Director queue.

To define Monitored Servers

1. On the Director server, click **Start > Programs > Interactive Intelligence > Director Admin**.
2. In the tree view, click the **Monitored Servers** container.



Status icon: Status of Director's network link to the site. Director polls the sites every two minutes and updates this status accordingly.

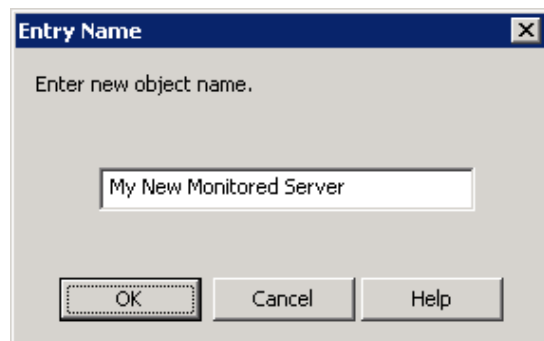
Icon	Description
	Site is available.
	Site is not available.
	Undetermined link status.

Monitored Server: CIC server to which Director can route calls.

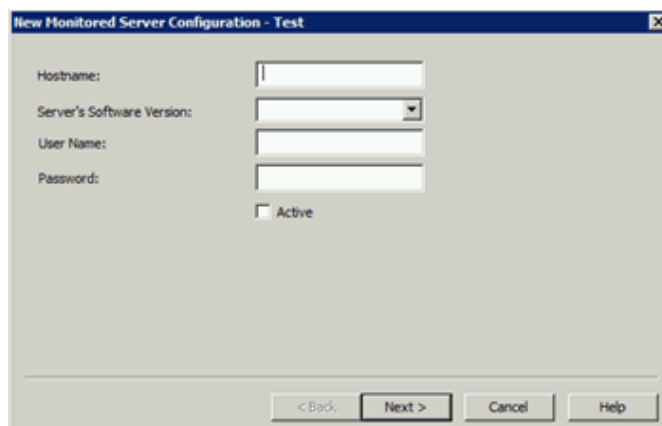
Active: Indicates whether the server is eligible to receive calls that Director routes to it. Only active servers can receive calls.

Server Name: IP address or host name of the monitored CIC server.

- Right-click in the list view and then click **New**. The **Entry Name** dialog box appears.



- In the box, type the name of the CIC server for Director to monitor and then click **OK**. The **New Monitored Server Configuration** dialog box appears.



Hostname: Name or IP address of the Monitored Server.

Server's Software Version: Version of CIC running on the Monitored Server. The "Site version" server parameter contains the list of known supported versions.

User Name: CIC user ID that you used to run Setup Assistant during installation of the Monitored Server.

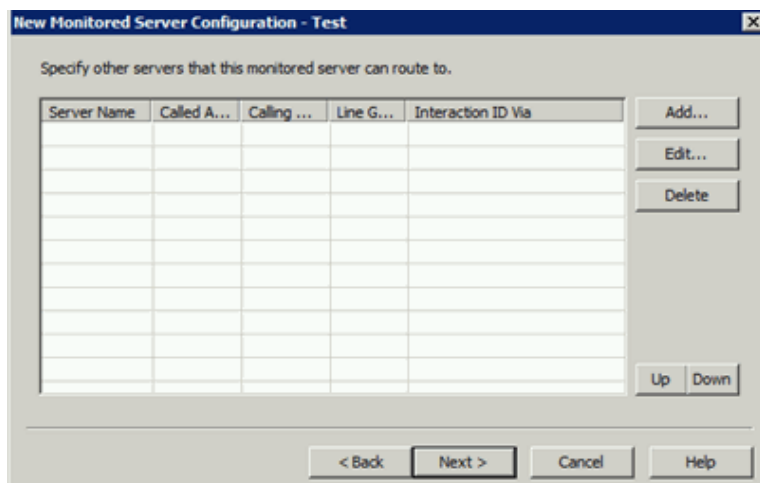
Password: Password associated to the CIC user ID.

Active: If selected, this server is active and available for monitoring.

Note:

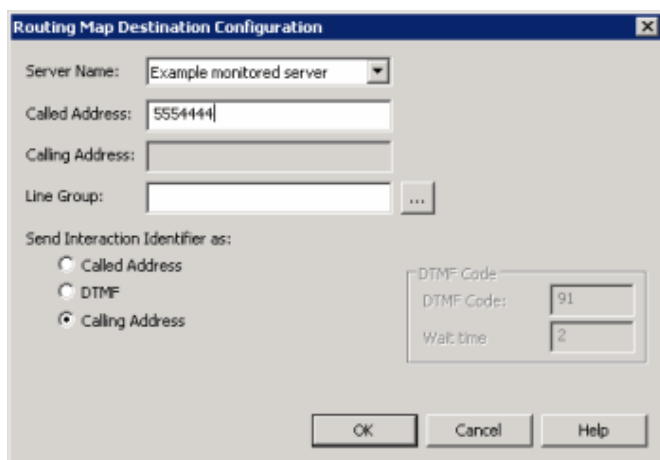
Director uses these credentials to access data from this CIC server.

5. Complete the information and then click **Next**. The next page of the wizard appears.



The dialog box titled "New Monitored Server Configuration - Test" contains a table with the following columns: "Server Name", "Called A...", "Calling ...", "Line G...", and "Interaction ID Via". To the right of the table are buttons for "Add...", "Edit...", "Delete", "Up", and "Down". At the bottom of the dialog are buttons for "< Back", "Next >", "Cancel", and "Help".

6. Do the following:
 - a. Click **Add**. The **Routing Map Destination Configuration** dialog box appears.



The dialog box titled "Routing Map Destination Configuration" includes the following fields and options: "Server Name" (a dropdown menu showing "Example monitored server"), "Called Address" (a text box with "5554444"), "Calling Address" (an empty text box), "Line Group" (an empty text box with a dropdown arrow), "Send Interaction Identifier as:" (radio buttons for "Called Address", "DTMF", and "Calling Address", with "Calling Address" selected), "DTMF Code" (a text box with "91"), and "Wait time" (a text box with "2"). At the bottom are "OK", "Cancel", and "Help" buttons.

Server Name: Name of the Monitored Server to route this Monitored Server to when routing interactions between servers.

Called Address: Called number of the T1/E1 or ISDN tie line for the Monitored Server specified in the **Server Name** box. This phone number connects the servers.

Calling Address: Calling number of the ISDN tie line that connects this Monitored Server and the server specified in the **Server Name** box. The system places the interaction ID information in the origination information of the extended place call tool. If the tie line is not ISDN, specify the ANI/DNIS configuration for the interface on both CIC servers. For a T1/E1 line, leave this box blank.

Line Group: Line group for Director to use when routing calls from this Monitored Server to the server specified in the **Server Name** box. For a T1/E1 line, leave this box blank.

Send Interaction Identifier as: These options configure signaling attributes that identify the interaction when it routes to the server.

Called Address: If selected, places the called number of the tie line in the dial string of the extended place call tool. If the tie line is not ISDN, specify the ANI/DNIS configuration for the interface on both CIC servers.

DTMF: (Dual-Tone Multi-Frequency) If selected, plays digits to navigate an IVR. The interaction ID information plays as tones after the call connects, the wait time passes, and the DTMF code plays. Select this option when you have a dedicated T1/E1 tie line between servers.

Calling Address: If selected, places the calling number of the tie line in the dial string of the extended place call tool. If the tie line is not ISDN, specify the ANI/DNIS configuration for the interface on both CIC servers.

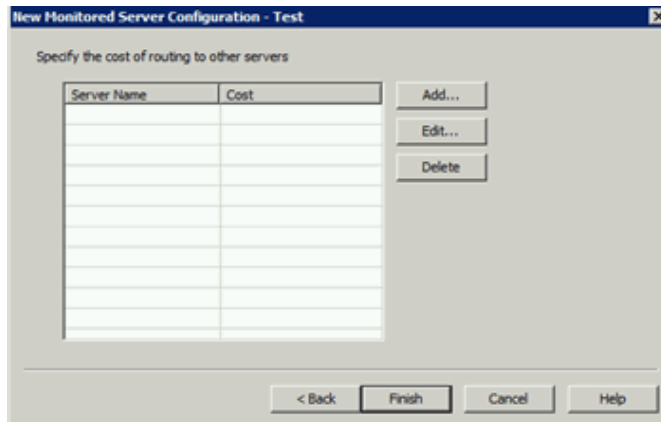
DTMF Code: Code to play when sending an interaction ID between servers connected by a T1/IE tie line.

Wait time: Number of seconds to wait to play in interaction ID as tones.

Important!

If you selected the **DTMF** option for servers connected by a T1/IE tie line, change the handler on each Monitored Server. For more information, see [Handler Change for T1 Tie Lines](#).

- b. Complete the information and then click **OK**.
- c. Add more routing maps as necessary.
- d. To rearrange the routing order, click a server and then click **Up** or **Down**.
- e. Click **Next**. The next page of the wizard appears.

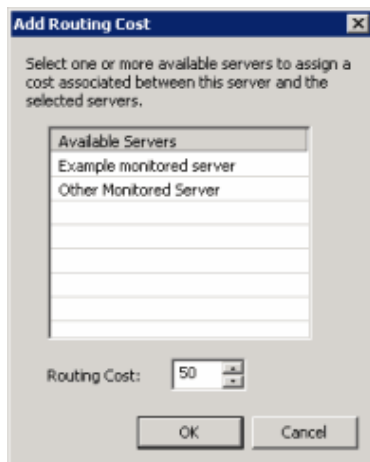


The dialog box titled "New Monitored Server Configuration - Test" contains the instruction "Specify the cost of routing to other servers". It features a table with two columns: "Server Name" and "Cost". To the right of the table are three buttons: "Add...", "Edit...", and "Delete". At the bottom of the dialog are four buttons: "< Back", "Finish", "Cancel", and "Help".

7. Do the following:
 - a. Click **Add**. The **Add Routing Cost** dialog box appears.

Note:

If all defined Monitored Servers have assigned routing costs, a notification dialog box appears, indicating that all available servers have routing costs assigned. Click **OK**.



The dialog box titled "Add Routing Cost" contains the instruction "Select one or more available servers to assign a cost associated between this server and the selected servers." It features a list box labeled "Available Servers" with two entries: "Example monitored server" and "Other Monitored Server". Below the list box is a "Routing Cost" field with a numeric value of "50" and up/down arrow buttons. At the bottom are "OK" and "Cancel" buttons.

Available Servers: Available servers to which to assign a routing cost.

Routing Cost: Numeric value (from 1 to 100) used to weight the relative cost of routing to other Monitored Servers. The default value is 50 for any server not assigned a specific value. Higher numbers signify more costly routing.

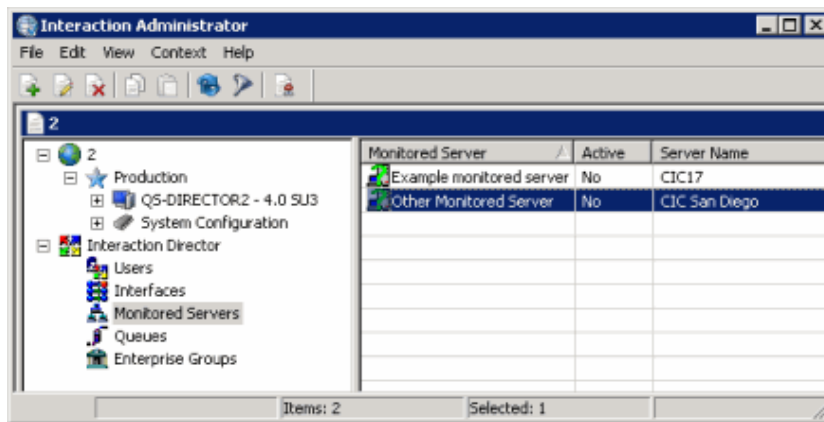
- b. Click a server and then type or select the routing cost.
 - c. Click **OK**.
 - d. Assign costs to other servers as necessary.
 - e. To delete a routing cost, click the server and then click **Delete**. The system doesn't ask you to confirm this operation so use caution when deleting a cost.
 - f. Click **Finish**.
8. Return to the [Director Server Installation Checklist](#), and proceed to the next step.

Define Connections Between Monitored Servers

After you define the Monitored Servers for the Director server to manage, define connections between Monitored Servers so that interactions route between them. For more information about routing combinations and their effect, see [Routing Combinations](#).

To define connections between Monitored Servers

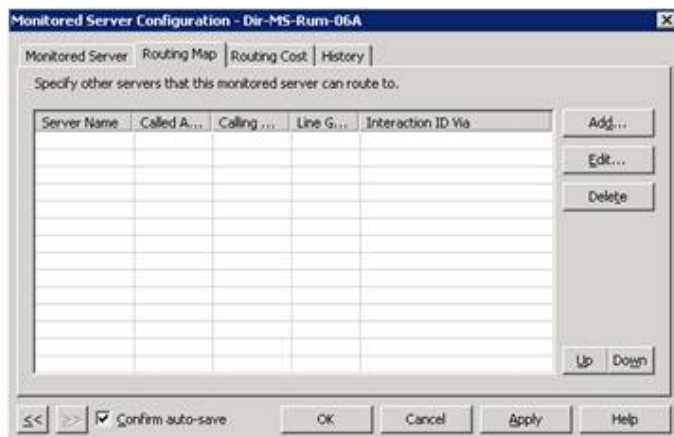
1. On the Director server, start Interaction Administrator and then click the **Monitored Servers** container.



2. In the list view, double-click a Monitored Server. The **Monitored Server Configuration** dialog box appears.



3. Click the **Routing Map** tab.



4. Click **Add**. The **Routing Map Destination Configuration** dialog box appears.

Routing Map Destination Configuration

Server Name:

Called Address:

Calling Address:

Line Group: ...

Send Interaction Identifier as:

☐ Called Address

☐ DTMF

☒ Calling Address

DTMF Code

DTMF Code:

Wait time:

OK Cancel Help

Server Name: Name of the Monitored Server to route this Monitored Server to when routing interactions between servers.

Called Address: Called number of the T1/E1 or ISDN tie line for the Monitored Server specified in the **Server Name** box. This phone number connects the servers.

Calling Address: Calling number of the ISDN tie line that connects this Monitored Server and the server specified in the **Server Name** box. The system places the interaction ID information in the origination information of the extended place call tool. If the tie line is not ISDN, specify the ANI/DNIS configuration for the interface on both CIC servers. For a T1/E1 line, leave this box blank.

Line Group: Line group for Director to use when routing calls from this Monitored Server to the server specified in the **Server Name** box. For a T1/E1 line, leave this box blank.

Send Interaction Identifier as: These options configure signaling attributes that identify the interaction when it routes to the server.

Called Address: If selected, places the called number of the tie line in the dial string of the extended place call tool. If the tie line is not ISDN, specify the ANI/DNIS configuration for the interface on both CIC servers.

DTMF: (Dual-Tone Multi-Frequency) If selected, plays digits to navigate an IVR. The interaction ID information plays as tones after the call connects, the wait time passes, and the DTMF code plays. Select this option when you have a dedicated T1/E1 tie line between servers.

Calling Address: If selected, places the calling number of the tie line in the dial string of the extended place call tool. If the tie line is not ISDN, specify the ANI/DNIS configuration for the interface on both CIC servers.

DTMF Code: Code to play when sending an interaction ID between servers connected by a T1/IE tie line.

Wait time: Number of seconds to wait to play in interaction ID as tones.

5. If you selected the **DTMF** option for servers connected by a T1/IE tie line, change the handler on each Monitored Server. For more information, see [Handler Change for T1 Tie Lines](#).
6. Complete the information in the dialog box.
7. Define other routing map connections between this Monitored Server and other Monitored Servers as necessary.
8. Click **OK**.

Routing Combinations

The following table describes various routing combinations between servers and what to expect for each combination.

Called Address	Calling Address	Line Group	ID Method	Comments
blank	blank or string	blank	any	Invalid—you cannot have a blank called address and a blank line group at the same time.
blank or string	string	blank or string	Calling Address	Invalid—you cannot indicate to place the ID information in the calling address field and specify a calling address at the same time.
blank	blank or string	string	RLT	Invalid—you cannot RLT a call when placing the inter-server call over a tie line.

string	blank or string	blank or string	Called Address	Invalid—you cannot indicate to place the ID information in the called address field and specify a called address at the same time. Note: In 2.3+, this method is valid if the called address as entered or after going through the Dial Plan (depending on whether the line group is supplied) is a SIP address. In that case, the Interaction ID information is placed in the attribute information of the extended place call tool.
blank	blank or string	string	Called Address	Only use when you have a dedicated T1/E1 or ISDN tie line between servers. The Interaction ID information is placed directly in the dial string of the extended place call tool. If the tie line is not ISDN, you must have the ANI/DNIS configuration set correctly for the interface on both IC servers.
blank	blank	string	Calling Address	Only use when you have a dedicated T1/E1 or ISDN tie line between servers. The Interaction ID information is placed in the origination information of the extended place call tool. If the tie line is not ISDN, you must have the ANI/DNIS configuration set correctly for the interface on both IC servers.
blank	blank	string	DTMF	Only use when you have a dedicated T1/E1 or ISDN tie line between servers. The Interaction ID information plays as tones after all the following happen: <ul style="list-style-type: none"> • Call connects • Two seconds pass • "91" digits play Customize the IVR on the remote IC server to call the subroutine DirectorMs_ReceiveDtmfSubr upon receiving "91." For more information, see Handler Change Required for T1 Tie Lines .
blank	string	string	DTMF	Only use when you have a dedicated T1/E1 or ISDN tie line between servers. The Interaction ID information plays as tones after all the following happen: <ul style="list-style-type: none"> • Call connects • Two seconds pass No digits play to navigate the IVR. Customize the IVR on the remote IC server to call the subroutine DirectorMs_ReceiveDtmfSubr based receiving the value in the calling information as the ANI. If the tie line is not ISDN, configure the ANI/DNIS correctly for the interface on both IC servers.
string	blank	blank	Calling Address	The dial plan determines the actual dial string and line group on which to place the outgoing call. The Interaction ID information is placed in the origination information of the extended place call tool.
string	blank or string	blank	RLT	This combination is only valid for 2.3+ IC servers using SIP. The dial plan determines the actual dial string and line group on which to place the outgoing call. The RLT specification is only a request to RLT. The call is Release Link Transferred if possible, meaning that if it is not possible (because of the carrier or other factors on the IC server) and it is otherwise successful, the call is tromboned. The Interaction ID information is placed in the attribute information of the extended place call tool.
string	blank	blank	DTMF	The dial plan determines the actual dial string and line group on which to place the outgoing call. The Interaction ID information is played as tones after all the following happen: <ul style="list-style-type: none"> • Call connects • Two seconds pass • "91" digits play Customize the IVR on the remote IC server to call the subroutine DirectorMs_ReceiveDtmfSubr upon receiving "91." For more information, see Handler Change Required for T1 Tie Lines .
string	blank	string	Calling Address	The call goes out on the specified line group and doesn't use the dial plan. The string in the called address field passes unaltered to the extended place call tool. The Interaction ID information is placed in the origination information of the extended place call tool.
string	blank or string	string	RLT	This combination is only valid for 2.3+ IC servers using SIP. The call goes out on the specified line group and doesn't use the dial plan. The string in the called address field passes unaltered to the extended place call tool. The RLT specification is only a request to RLT. The call is Release Link Transferred if possible, meaning that if it is not possible (because of the carrier or other factors on the IC server) and it is otherwise successful, the call is tromboned. The Interaction ID information is placed in the attribute information of the extended place call tool.

string	blank	string	DTMF	<p>The call goes out on the specified line group and doesn't use the dial plan. The string in the called address field passes unaltered to the extended place call tool.</p> <p>The Interaction ID information plays as tones after all the following happen:</p> <ul style="list-style-type: none"> • Call connects • Two seconds pass • "91" digits play <p>Customize the IVR on the remote IC server to call the subroutine DirectorMs_ReceiveDtmfSubr upon receiving "91." For more information, see Handler Change Required for T1 Tie Lines.</p>
string	string	blank	DTMF	<p>The dial plan determines the actual dial string and line group on which to place the outgoing call. The Interaction ID information plays as tones after all the following happen:</p> <ul style="list-style-type: none"> • Call connects • Two seconds pass <p>No digits play to navigate the IVR. Customize the IVR on the remote IC server to call the subroutine DirectorMs_ReceiveDtmfSubr based on receiving the value in the calling information as the ANI.</p>
string	string	string	DTMF	<p>The call goes out on the specified line group and doesn't use the dial plan. The string in the called address field passes unaltered to the extended place call tool. The Interaction ID information plays as tones after all the following happen:</p> <ul style="list-style-type: none"> • Call connects • Two seconds pass <p>No digits play to navigate the IVR. Customize the IVR on the remote IC server to call the subroutine DirectorMs_ReceiveDtmfSubr based on receiving the value in the calling information as the ANI.</p>

Non-reuse of Fatal Inter-server Routes

Director monitors all routes that transfer calls between monitored CIC servers. If Director detects certain errors and suspects they are fatal (for example, "no answer" can indicate configuration of a wrong number), Director blocks that route from further use until an authorized administrator intervenes. Intervention in this situation can include editing the route definition or solving a network issue and resetting the route.

The following table describes scenarios that result in the immediate non-usability of an inter-server call route. In cases that don't involve editing and saving the route specification, you can send a reset command from the Supervisor view to reset the route. This view shows the state of the route specifications.

Scenario	Recovery
The DialplanEx subroutine returns an error.	Determine source of error in subroutine.
Invalid combinations of settings in the route specification. For more information, see Routing Combinations .	Correct the route specification. For more information, see Define Connections Between Monitored Servers .
No answer from the destination server.	Determine why the destination server is not answering or whether the route specification has incorrect settings that can cause the call to go somewhere other than the expected server. Also, check whether the lines used are operational all the way through the PSTN, if applicable.
The ExtendedPlaceCall tool takes one of the following exit paths: Machine, Not Reached, Fax, or Intercept.	Determine why the call attempt resulted in one of these exit paths.
The ExtendedPlaceCall tool takes either the Canceled or Failure exit paths NOT as a result of the original caller disconnecting. If taking one of these two paths and the original call is still connected, then it is a fatal error for the route used.	Determine why the call attempt resulted in one of these exit paths.
DTMF is the method to identify the call and the handshake with the destination server fails.	Determine why the DTMF handshake failed. For example, incorrect configuration for the destination server, incorrect signaling attribute, or incorrect route specification. For more information, see Define Connections Between Monitored Servers .

Handler Change for T1 Tie Lines

When using DTMF to send an Interaction ID between servers connected by a T1 tie line, it is necessary to make a handler change on each monitored server. Customize the IVR on the remote CIC to call the subroutine `DirectorMs_ReceiveDtmfSubr` upon receiving 91.

To change the handler for T1 lines

1. In Interaction Designer, open the **SystemIvrCustomizations** handler.
2. Locate the **DialString** selection step.
3. Add a selection statement to the step that reads "91=DialString".
4. Place the **DirectorMs_ReceiveDtmfSubr** subroutine in the handler, and connect the output of the selection statement that you just added to the subroutine.
5. Save and publish the handler.

Handler Customization Points

Director server configuration controls pre-call settings and routing options, unless you create custom handlers to apply other routing logic. Director server also controls post-call routing. You can use handler customization points to enhance post-call routing options.

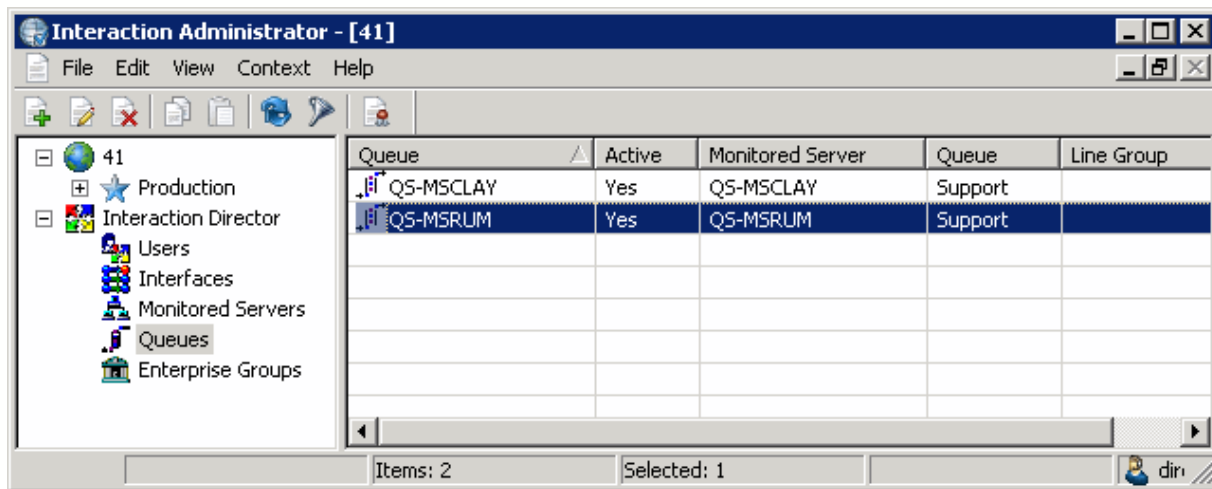
Handler	Customization Point
DirectorMs_CustomInQueueTimeout	Defines the behavior when the in-queue timeout expires. The output flag specifies whether the interaction continues to wait. The handler can modify interaction parameters and let the interaction continue to wait or remove the interaction from processing. An index passes into the handler that indicates how many times Director called it.
DirectorMs_CustomEscape	Defines the behavior when a caller escapes from hold while waiting for the interaction to route.
DirectorMs_CustomSelectAudio	Defines the audio to play to a waiting caller. The inputs are a Call ID and an Index. The system increments the index for each invocation of the handler, but you can set it to any value within the handler. A flag indicates to the calling handler whether to stop the audio. If you don't set this flag to true upon exit, it is the handler's responsibility to queue an audio item (music or prompt) to play next.
DirectorMs_CustomRoutedAttributes	<p>Provides the opportunity for customers to examine the interaction; adjust attributes; or package up lists of attribute names and values, and send them to the remote CIC server with the routed interaction. These attributes remain associated to the interaction when a remote server receives the interaction. Statistics and report groups related to each interaction also route as attributes.</p> <p>Director calls this handler just before transferring a routed call to the destination workgroup.</p>
DirectorMs_CustomSetupRoutedInteraction	Provides the opportunity to examine or alter the remote end of a remotely routed interaction just before enqueueing it on the chosen destination workgroup's queue. The only input is the Interaction ID and there are no outputs.
DirectorMs_UpdateInteractionParmsSubr	<p>Instructs Director to alter the skills, priority, or both of a waiting interaction. You can call this handler anytime an interaction is waiting, subject to other events in the system that affected the state of the interaction before or at the same time as the invocation. The inputs are parallel lists of the values that make up a skill requirement definition (name, proficiency range, desire to use range) and an integer to specify priority.</p> <p>The new priority value replaces the existing one. The skill values override existing values on the waiting interaction in the following manner:</p> <ul style="list-style-type: none">• If the skill name is the same as an existing skill, it replaces the existing one.• If you set all ranges for the skill to 0, the handler removes the skill requirement.• If the skill does not exist on the waiting interaction, the handler adds it.

Define Queue Objects




Use the **Queue Configuration** dialog box in Interaction Administrator to define the remote queues to which Interaction Director can route. To define more than one queue object at once, see [Create Multiple Queue Objects](#).

To define queue objects

1. On the Director server, start Interaction Administrator and then click the **Queues** container.



Status icon: Status of the queue. Director polls the links every two minutes and updates this status accordingly.

Icon	Description
	The link is operational. Director can route calls to this monitored server.
	The link is not operational. Director cannot route calls to this monitored server.
	Director has not determined the status of the link.

Queue: Name of the Queue object as defined in Director.

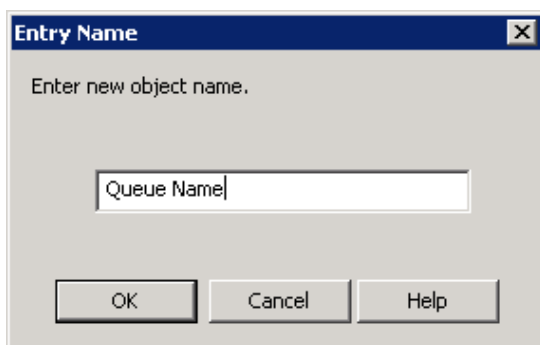
Active: Indicates whether the queue is ready to receive route requests. Only active queues can receive requests.

Monitored Server: CIC server to which Director can route calls.

Queue: Name of the remote queue as defined on the Monitored Server.

Line Group: Name of the line group associated to the remote queue.

- Right-click in the list view and then click **New**. The **Entry Name** dialog box appears.



- In the box, type a unique and descriptive name for the queue and then click **OK**. The **New Queue Configuration** dialog box appears.

Note:

Genesys recommends that you establish a naming convention for queues that combines the location with the name of the site queue so that it's easier to group queues to form Enterprise Groups. For example, queues located in San Francisco begin with SF_ and queues located in Los Angeles begin with LA_.

New Queue Configuration - Test

Monitored Server:

Queue:

Line Group:

☐ Active

< Back

Monitored Server: Name of the Monitored Server. If the server you want isn't in the list, create one using the [Monitored Servers Container](#).

Queue: Site queue on the remote CIC server that Director can use for routing and monitoring purposes. If you select the **Active** check box, click **Browse...** and then select a queue from the **Browse Remote Server** dialog box. If you clear the **Active** check box, you can save your changes without specifying a queue.

Line Group: Name of the line group to associate to the queue. Click **Browse...** and then select a queue from the **Browse Remote Server** dialog box.

Active: If selected, the Queue is ready to receive route requests. Ensure that you specify a site queue. If cleared, you can save your changes without specifying a queue.

4. Complete the information and then click **Finish**.
5. Define other queues as necessary.

Define Enterprise Groups

Use the **New Enterprise Group Configuration** wizard in Interaction Administrator to define enterprise groups. For more information about enterprise groups, see [Enterprise Groups Container](#).

To define enterprise groups

1. On the Director server, start Interaction Administrator and then click the **Enterprise Groups** container.

Interaction Administrator - [41]

File Edit View Context Help

Enterprise Group Active

Enterprise Group	Active
Support	Yes

Items: 1 Selected: 0

2. Right-click in the list view and then click **New**. The **Entry Name** dialog box appears.

Entry Name

Enter new object name.

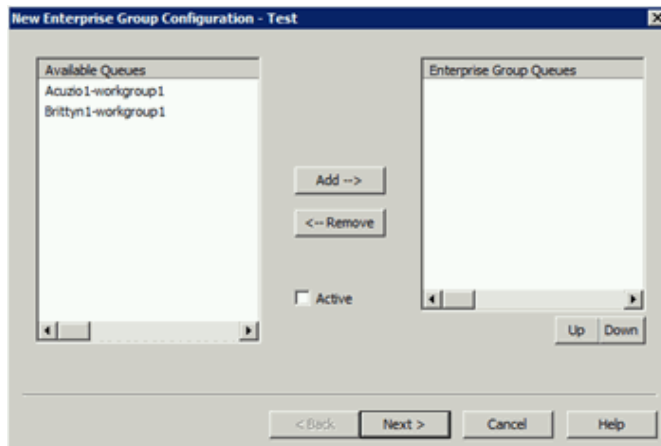
ExampleEG

OK

3. In the box, type a descriptive name for the enterprise group and then click **OK**. The **New Enterprise Group Configuration** wizard appears.

Note:

Genesys recommends that you establish a naming convention for enterprise groups. For example, "Corporate Sales EG."

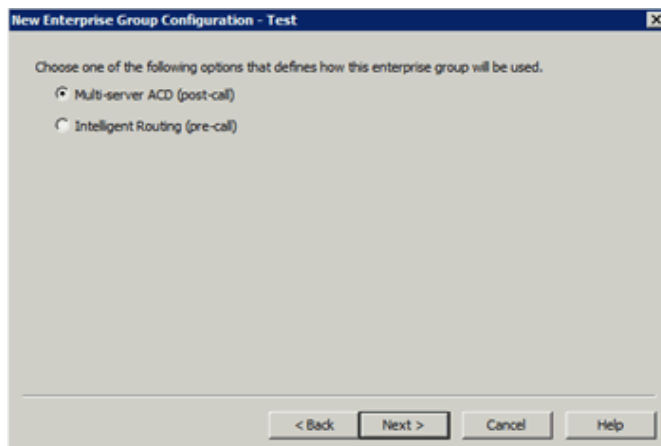


Available Queues: Queues that you can associate to this enterprise group.

Enterprise Group Queues: Queues associated to this enterprise group.

Active: If selected, the enterprise group is active. If cleared, the enterprise group is inactive and Interaction Director ignores the group.

4. Do the following:
 - a. To add a queue to the group, click the queue in the **Available Queues** list box and then click **Add-->**. The queue moves to the **Enterprise Group Queues** list box.
 - b. To remove a queue from the group, click the queue in the **Enterprise Group Queues** list box and then click **<--Remove**. The queue moves to the **Available Queues** list box.
 - c. Select the **Active** check box.
 - d. To change the order of an enterprise group, in the **Enterprise Group Queues** list box, click the group and then click **Up** or **Down**. Director evaluates groups in the order they appear in the list box.
5. Click **Next**. The next page of the wizard appears.



Multi-server ACD (post-call): If selected, Director uses post-call routing for the enterprise group. For more information, see [Post-call Routing](#).

Intelligent Routing (pre-call): If selected, Director uses pre-call routing for the enterprise group. For more information, see [Pre-call Routing](#).

6. Select an option and then click **Next**. The next page of the wizard appears.

Monitored Value	Bias	Importance
Number of logged in agents	+	1
Longest wait time	-	1
Average wait time	-	1
Number of waiting calls	-	1
Number of connected calls	-	1
Ratio of free to active lines	+	1
Number of active lines	-	1

Interval in seconds over which any time-based scores increase by 1: 30

☒ Disqualify queue if no free lines
☒ Disqualify queue if no agents logged in
☐ Disqualify queue if no available agents

< Back Next > Cancel Help

Monitored Value: Values that Director monitors to make routing decisions. Unavailable items display in gray to indicate that you configured Director to ignore the value when scoring. To change availability, double-click the value and then, in the **Routing Criterion Definition** dialog box, select **Enable this criterion for scoring**. For more information about monitored values, see [Monitored Values](#).

Bias: Monitored value's positive or negative bias. A plus indicates that higher values are more desirable from a scoring point of view. A minus indicates that lower values are more desirable.

Importance: Number between 1 and 100 that weights the criteria's influence on the routing calculation. Assign more important criteria a higher weight. Importance works with the bias setting to indicate whether a higher number is more desirable or less desirable. For example, whether a higher number means that the agent can receive the call or a higher number means that the agent cannot receive the call. Higher weight makes a specific factor affect the score more in whatever direction the bias specifies. A value of "Not used" indicates that Director doesn't use the value when Director scores this Enterprise Group.

Interval in seconds over which any time-based scores increase by 1: Number of seconds (from 1 to 600) over which any time-based scores increase by 1. The default is 30 seconds.

Disqualify queue, if no free lines: If selected, Director does not evaluate enterprise group queues when no lines are available.

Disqualify queue, if no agents logged on: If selected, Director does not evaluate enterprise group queues when no agents are logged on. This option is available for pre-call only.

Disqualify queue, if no available agents: If selected, Director does not evaluate enterprise group queues when no agents are available. This option is available for pre-call only.

- Complete the information and then click **Next**. The next page of the wizard appears.

Skill Name	Proficiency Min / Max / Bias / Importance	Desire to Use Min / Max / Bias / Importance

Add...
Edit...
Delete

< Back Finish Cancel Help

- Click **Add**. The **Enterprise Group Skill Specification** dialog box appears.

Enterprise Group Skill Specification

Skill Name:

Proficiency Values

Minimum: Maximum:

Proficiency Weight:

Bias: + Importance: 1

Desire to Use Values

Minimum: Maximum:

Desire to Use Weight:

Bias: + Importance: 1

Skill Name: Name of the skill to assign to the workgroup.

Proficiency Values section:

Minimum: Agent's minimum proficiency level for this skill, in a range from 1 to 100.

Maximum: Agent's maximum proficiency level for this skill, in a range from 1 to 100.

For example, if the skill is Spanish and the minimum proficiency is 70 and the maximum is 100, Director looks for agents whose language proficiency is 70 out of a possible 100-point range.

Proficiency Weight: Indicates whether the proficiency has a negative or positive bias and the weight of the proficiency's influence on the routing calculation.

Desire to Use section:

Minimum: Agent's minimum desire to use this skill, in a range from 1 to 100.

Maximum: Agent's maximum desire to use this skill, in a range from 1 to 100.

Desire to Use Weight: Indicates whether the "desire to use" has a positive or negative bias and its weight of importance.

9. Complete the information and then click OK.

10. Define other enterprise groups as necessary and then click OK.

Monitored Values

Director uses post-call and pre-call monitored values to make routing decisions.

Post-call monitored values

The following table describes the post-call monitored values.

Monitored Value	Description
Interaction Priority	Interaction priority weight (-10 to 10 inclusive).The default value is 1. Lower numbers mean less important, negative numbers mean that a higher number lowers the score.
Interaction Time in Queue	Interaction time in queue weight (-10 to 10 inclusive, default 1). Lower numbers mean less important, negative numbers mean that a higher number lowers the score.
Interaction Time in System	Interaction time in system weight (-10 to 10 inclusive, default 1). Lower numbers mean less important, negative numbers mean that a higher number lowers the score.
Agent Skills	Agent skills weight, which is the overall weight assigned to the overall skills score, not the weight per skill. The range is -10 to 10 inclusive. The default is 1. Lower numbers mean less important, negative numbers mean that a higher number lowers the score.
Agent Cost	Agent cost weight (-10 to 10 inclusive, default -1). Lower numbers mean less important, negative numbers mean that a higher number lowers the score.
Agent Available Time	Agent available time weight (-10 to 10 inclusive, default 1). Lower numbers mean less important, negative numbers mean that a higher number lowers the score.
Agent Occupied Percentage	Amount of time that an agent is busy with ACD calls and After Call Work, relative to the amount of ACD logon time for that day. The formula is: ACD Talk + ACW / ACD Logged In, where ACD Talk is total time that the agent is on ACD calls (that day), added to the total time that the agent is in ACW status (that day), divided by the total amount of time that the agent is logged on and available to accept ACD calls (that day).
Ratio of Free to Active Lines	Ratio of free lines to active lines weight (-10 to 10 inclusive, default 1). Lower numbers mean less important, negative numbers mean that a higher number lowers the score.
Queue Member Order Weight	Queue member order weight (-10 to 10 inclusive, default 0). Lower numbers mean less important, negative numbers mean that a higher number lowers the score).
Routing Cost	Routing cost weight (-10 to 10 inclusive, default -1). Lower numbers mean less important, negative numbers mean that a higher number lowers the score.
Specific Agent	Scoring factor weight for a specific Agent. The default bias is positive. The default weight is 1.
Specific Workgroup	Scoring factor weight for a specific Workgroup. The default bias is positive. The default weight is 1.
Specific Server	Scoring factor weight for a specific Server. The default bias is positive. The default weight is 1.

Pre-call monitored values

The following table describes the pre-call monitored values.

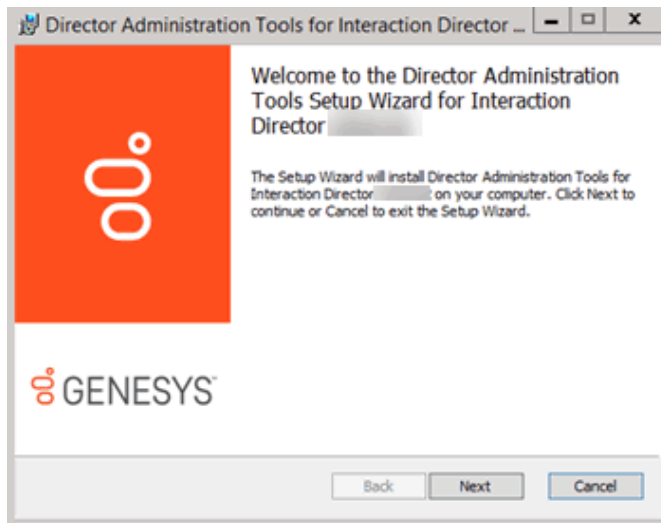
Monitored Value	Description
Number of Logged in Agents	Number of logged-on agents weight (-10 to 10 inclusive, default 1). When the bias is positive, lower numbers mean less important. When the bias is negative, a higher number lowers the score.
Longest Wait	Longest amount of time a call waited for an available agent to pick up.
Average Wait	Average amount of time a call waited for an available agent to pick up.
Number of Waiting Calls	Number of waiting calls weight (-10 to 10 inclusive, default -1). Lower numbers mean less important, negative numbers mean that a higher number lowers the score.
Number of Connected Calls	Number of connected calls weight (-10 to 10 inclusive, default -1). Lower numbers mean less important, negative numbers mean that a higher number lowers the score.
Ratio of Free to Active Lines	Ratio of free lines to active lines weight (-10 to 10 inclusive, default 1). Lower numbers mean less important, negative numbers mean that a higher number lowers the score.
Number of Active Lines	Number of active lines weight (-10 to 10 inclusive, default -1). Lower numbers mean less important, negative numbers mean that a higher number lowers the score.
Number of Wrapup Agents	Number of wrap-up agents weight (-10 to 10 inclusive, default 0). Lower numbers mean less important, negative numbers mean that a higher number lowers the score.
Average Wrapup Time	Average wrap-up time weight (-10 to 10 inclusive, default 0). Lower numbers mean less important, negative numbers mean that a higher number lowers the score.
Agent Skills	Logged-on agent skills weight, which is the overall weight assigned to the overall skills score, not the weight per skill. The range is -10 to 10 inclusive. The default is 1. Lower numbers mean less important, negative numbers mean that a higher number lowers the score.
Queue Member Order Weight	Queue member order weight (-10 to 10 inclusive, default 0). Lower numbers mean less important, negative numbers mean that a higher number lowers the score.

Install Director Administration Tools on Desktop Computers

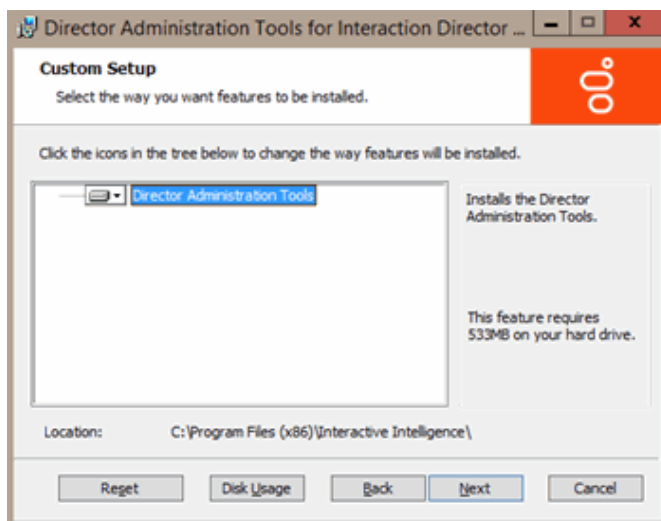
Use the **Director Administration Tools Setup** wizard to install Interaction Administrator and Interaction Designer applications on desktop computers. This optional install is for system administrators and handler developers. Interaction Designer provides tools for creating Director handlers. Interaction Administrator provides tools for managing Director Server. These programs installed on the Director server when you installed Director server.

To install Director Administration tools on desktop computers:

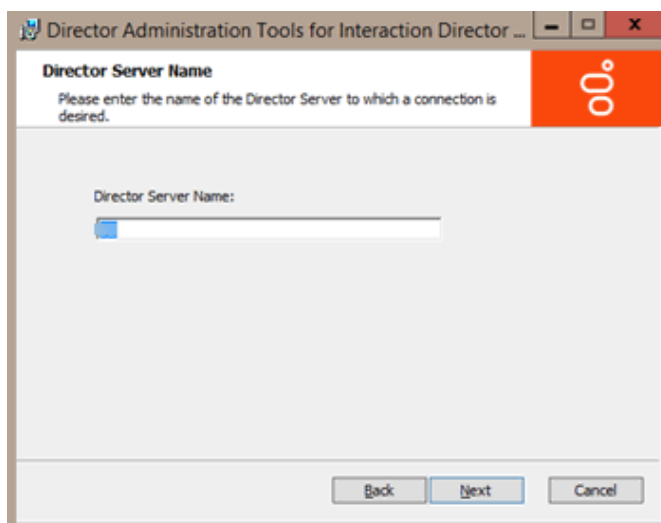
1. On the desktop computer, run `DirectorAdmin.msi` from the `DirectorAdmin` share on the Interaction Director server. The physical path is `D:\I3\Director\Install\DirectorAdmin`. To network users, this path is `\\servername\DirectorAdmin`. Replace *servername* with the name of the Director server. The Welcome page of the **Director Administration Tools Setup** wizard appears.



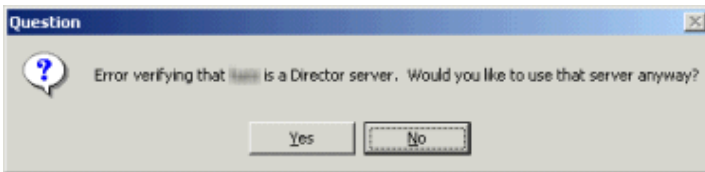
2. Click **Next**. The **Custom Setup** page appears.



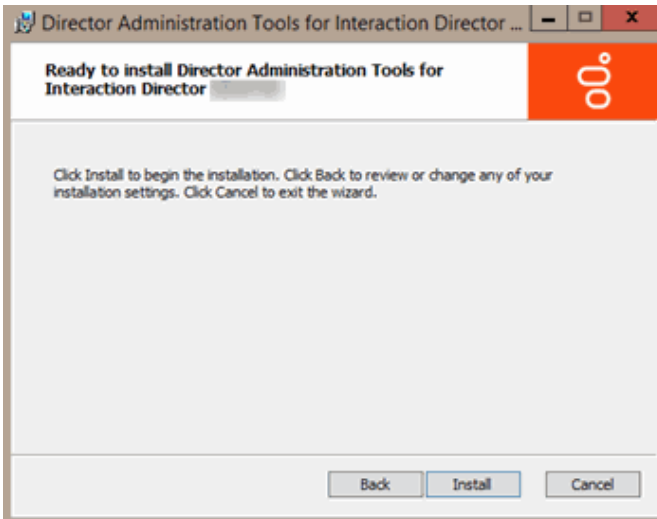
3. Select the programs and components to install and then click **Next**. By default, the wizard selects all components of Interaction Administrator and Interaction Designer for installation. The **Director Server Name** page appears.



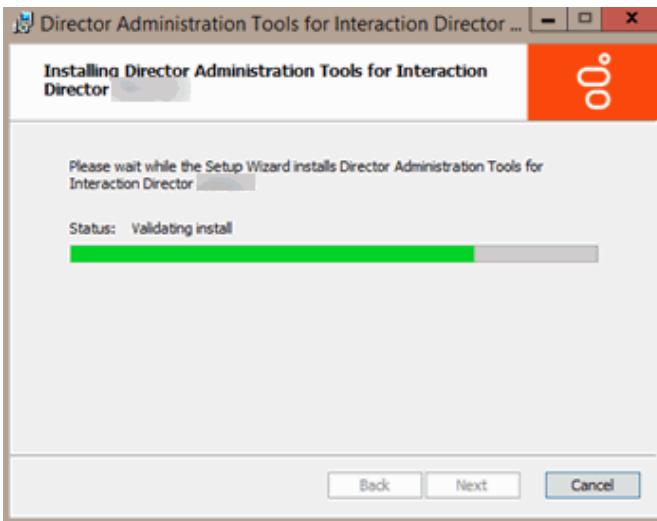
4. In the **Director Server Name** box, type the name (or IP address) of your Director server and then click **Next**. If setup detects that the named server is not an Interaction Director server, a confirmation dialog box appears. Check for an incorrect or misspelled server name. Click **No** to correct the server name, or click **Yes** to continue (not recommended).



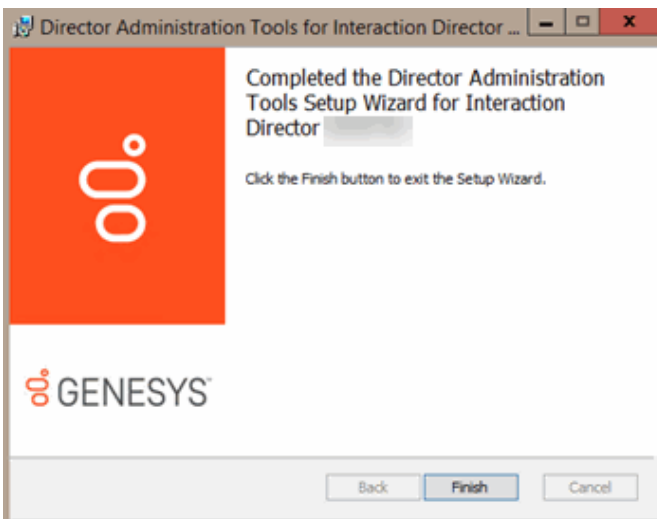
The Ready to Install Director Administration page appears.



5. Click **Install**. The **Installing Director Administrator Tools** page appears, which displays the progress of the installation.



6. Click **Next**. The last page of the wizard appears.



7. Click **Finish**. The install places shortcuts for Interaction Designer and Interaction Administrator on the desktop and in the **Start** menu under **All Programs > PureConnect**.

Monitored Server Installation Checklist

Complete this checklist to configure each Monitored Server in your organization so that Director can monitor it for call routing purposes.

1. Check for updates or patches relevant to your site. For more information, see Latest Releases.

The latest releases are available on the **Downloads** page of the Product Information Site at <https://help.genesys.com/pureconnect/secure/Downloads.aspx>. This page requires you to log on to the site. The Interaction Director section contains .iso files for each release. Beside each release, you can find the Readme and Summary files that explain the changes in each release.

2. If workgroups, dial plan, and line groups related to Director routing don't exist on the Monitored Server, set them up.
3. Do one of the following to enable Director on your Monitored Server:
 - For a CIC 4.0 or newer (for example, CIC 2015 R1 or later) server, do the steps to [Configure Monitored Server for CIC 4.0 or Later](#).
 - For a CIC 3.0 server, do the steps to [Configure Monitored Server for CIC 3.0](#).

Note:

Interaction Director can monitor any CIC 3.0, 4.0, or later (for example, CIC 2015 R1 or later) servers once you enable the Director Monitored Server feature and create a CIC user account for Interaction Director to use.

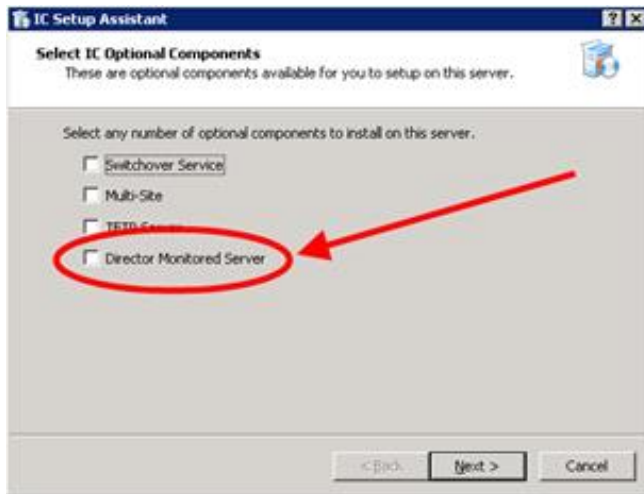
4. [Configure ACD Workgroups](#).
5. (Optional) [Add a Workgroup Skill](#).
6. (Optional) [Configure Workgroup Overflow](#).
7. (Optional) [Configure Workgroup Errors](#).
8. Complete this checklist for other ACD Workgroups that you want Director to evaluate for routing purposes. You don't have to configure workgroups that are only destinations for Director-handled interactions.
9. Complete this checklist for other Monitored Servers in your organization.

Configure Monitored Server for CIC 3.0

Use the **IC Setup Assistant** wizard to configure the Monitored Server for CIC 3.0. Rerunning Setup Assistant to add options requires a restart of the CIC subsystems and possibly a restart of the CIC server itself. Plan this update so as not to disrupt important business operations.

To configure Monitored Server for CIC 3.0

1. Open **IC Setup Assistant** from the CIC server. The **Welcome** page of the **IC Setup Assistant** wizard appears.
2. Open the **Select IC Optional Components** page and then select **Monitored Server**. For more information about IC Setup Assistant, see the *IC Setup Assistant Help* at https://help.genesys.com/cic/mergedProjects/wh_sa/desktop/introduction.htm.



3. Open Interaction Administrator.
4. Create a CIC Notifier account with the user name "IDIR" and any password you choose. Interaction Director server uses this account to access data about the Monitored Server.

Note:

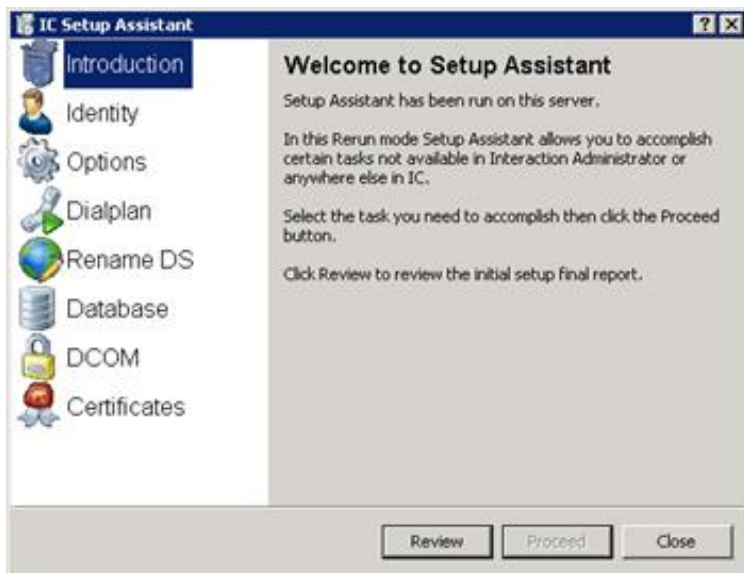
If the "IDIR" account exists because you used the CIC server as a Monitored Server previously, don't recreate the account.

Configure Monitored Server for CIC 4.0 or Later

Use the **IC Setup Assistant** wizard to configure the Monitored Server for CIC 4.0 or later (for example, CIC 2015 R1 or later). Rerunning Setup Assistant to add options requires a restart of the CIC subsystems and possibly a restart of the CIC server itself. Plan this update so as not to disrupt important business operations.

To configure Monitored Server for CIC 4.0 or later

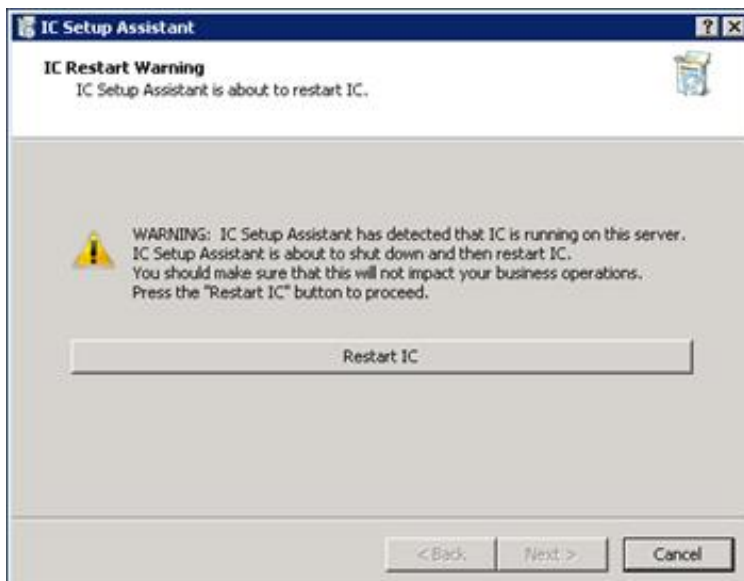
1. Open **IC Setup Assistant** from the CIC server. The **Welcome** page of the **IC Setup Assistant** wizard appears.



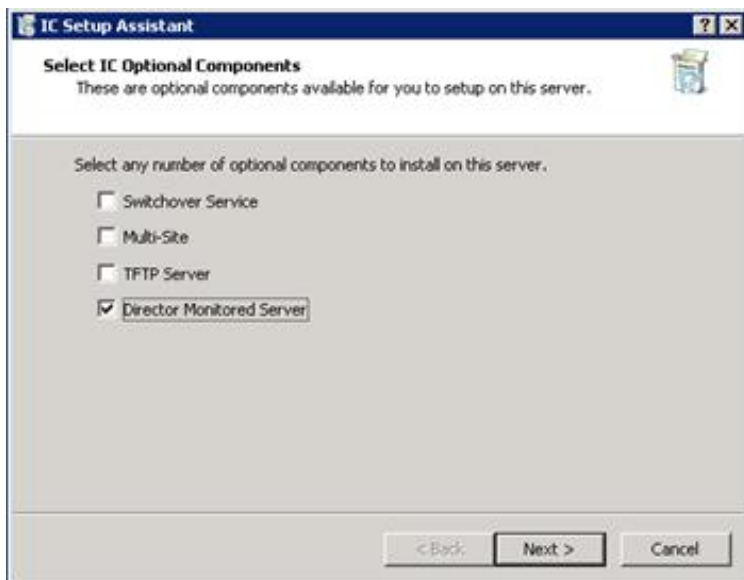
Note:

Since **IC Setup Assistant** runs on the initial CIC server configuration, it starts in rerun mode to allow you to add or change certain CIC server configuration options.

2. Click **Options** and then click **Proceed**. The **IC Restart Warning** page appears.



3. Click **Restart CIC**. **IC Setup Assistant** restarts the CIC server to apply changes. After the restart, the **Select IC Optional Components** page appears.



4. Select **Director Monitored Server** and then click **Next**. The **Director User Account** page appears.



I have already set up a User: If selected, allows you to specify an existing CIC user account for Interaction Director to use to monitor CIC servers.

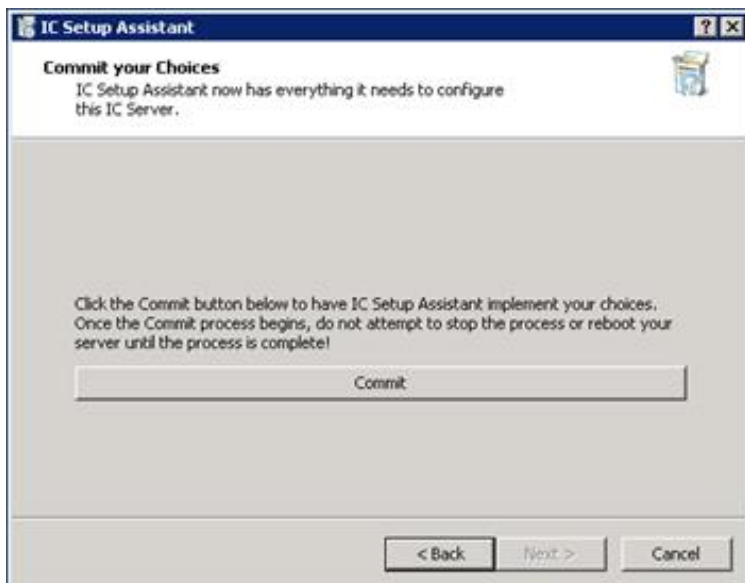
Create a new User with these credentials: If selected, allows you to create a CIC user account for Interaction Director to use to monitor CIC servers.

Name: CIC user name.

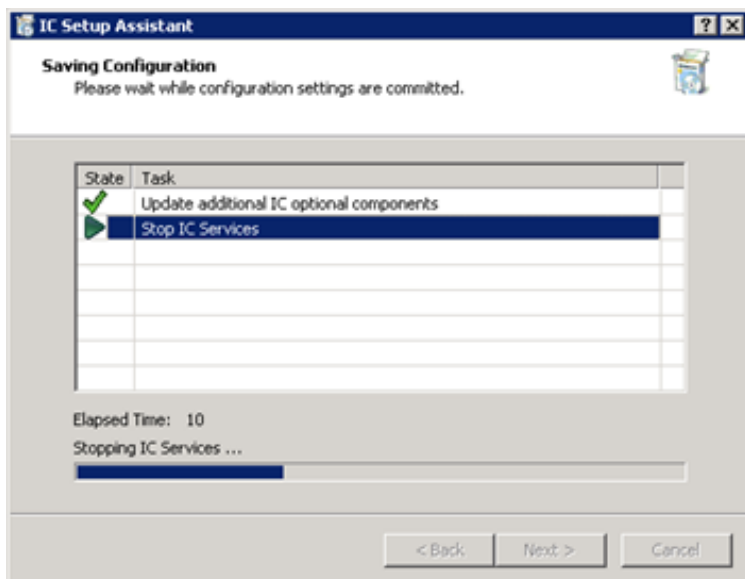
Password: CIC user password.

Confirm password: CIC user password, retyped for verification you typed it correctly in the **Password** box.

5. Complete the information and then click **Next**. The **Commit your Choices** page appears.



6. Click Commit. IC Setup Assistant saves your changes for this Director-monitored server and restarts the following services.



7. Click Next. The Completion page appears.
8. Click Finish. IC Setup Assistant restarts the CIC server and completes the configuration for this Director-monitored server.

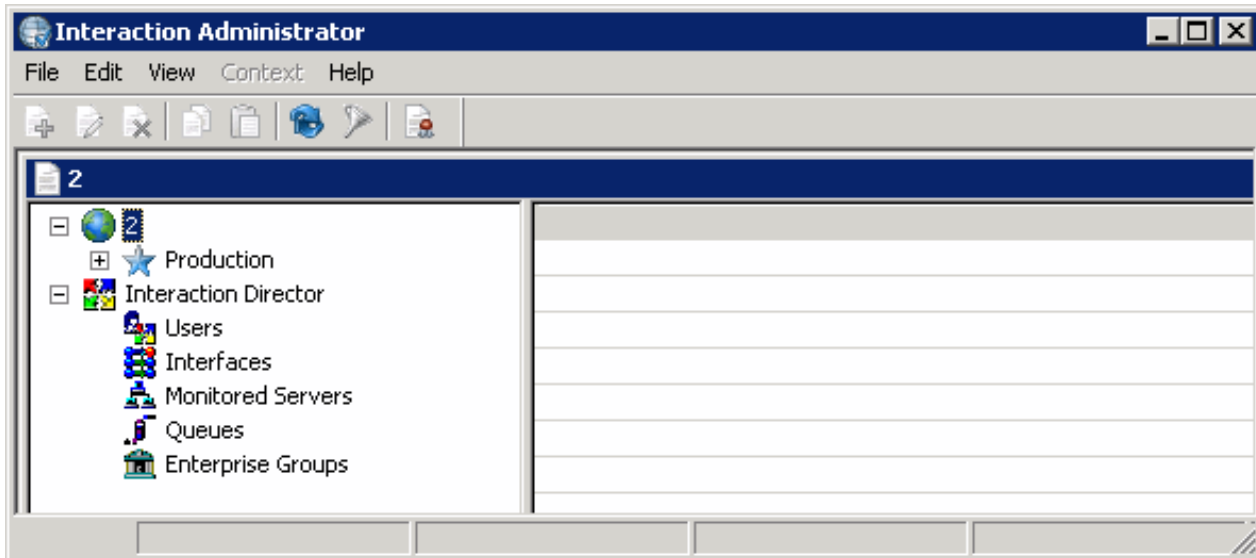
Interaction Director Containers

The Interaction Director containers in Interaction Administrator allows you to manage configuration information for the Director server. For more information about non-Director settings, see the *Interaction Administrator Help* at https://help.genesys.com/cic/desktop/interaction_administrator.htm.

Note:

The list view does not refresh the list each time you insert, delete, or modify data. The list view does refresh automatically when you sort columns or click a new branch in the tree view.

To refresh the list view, press the **F5** key.



Interaction Director node: Allows you to manage Director server configurations. The system requires and supports one Director server configuration only. For more information, see [Configure Director Server](#).

Users container: Allows you to manage user information for authentication purposes when users log on to the Director server. For more information, see [Users Container](#).

Interfaces container: Allows you to define boards and devices that interface with MCI or SIP. You can manage adapter, carrier, and protocol configurations. For more information, see [Interfaces Container](#).

Monitored Servers container: Allows you to manage details about the CIC servers that are available for Director to monitor to make intelligent routing decisions. For more information, see [Monitored Servers Container](#).

Queues container: Allows you to associate a Monitored Server, queue, and line group within a site, so that Director can collect statistics about the object to make routing decisions. Director handlers route interactions based on statistics collected for queues. For more information, see [Queues Container](#).

Enterprise Groups container: Allows you to manage enterprise groups, which are collections of queues that represent the target destination of a routed interaction. For more information, see [Enterprise Groups Container](#).

Server Parameters container: While not an Interaction Director container, it allows you to manage global variables, settings, and paths that Director uses. For more information, see [Server Parameters Container](#).

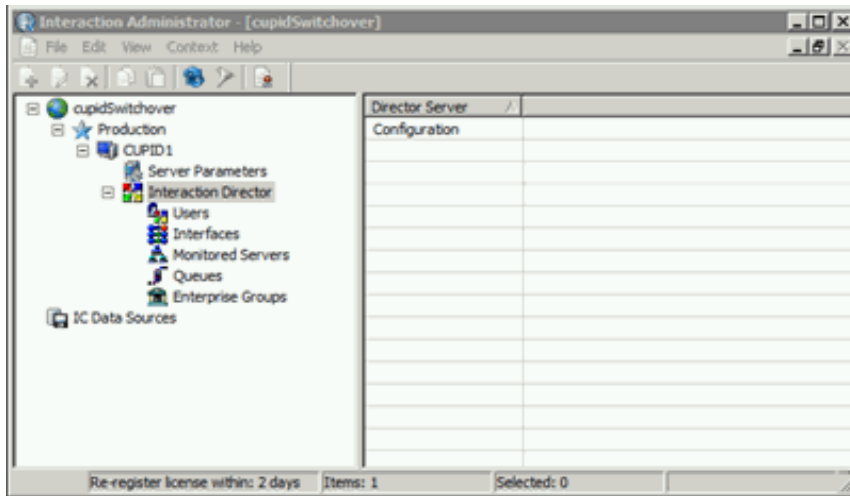
Configure Director Server

The **Configuration** tab in the **Director Server Configuration** dialog box allows you to manage Director server configuration settings. The system requires and supports one Director server configuration only. You cannot add or delete the Director server configuration. You can only change the settings.

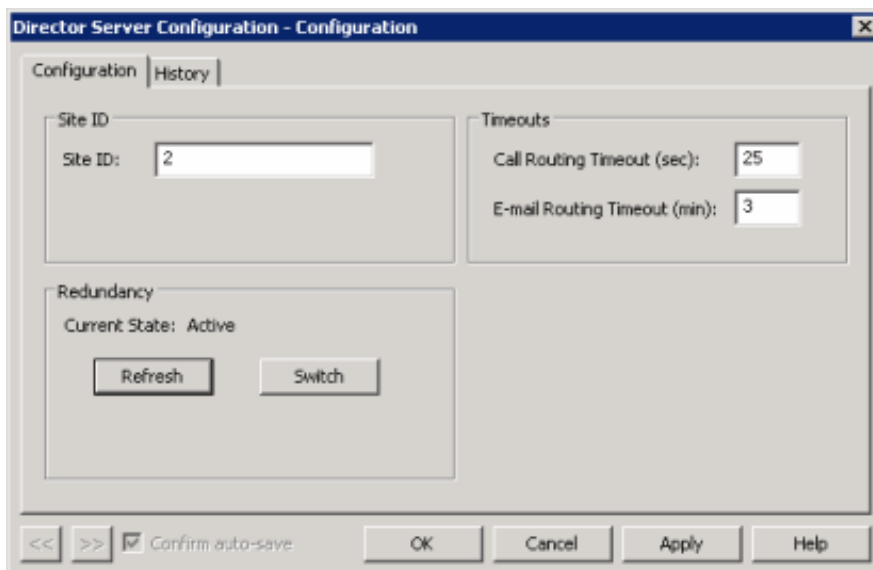
For more information, see the *Interaction Administrator Help* at https://help.genesys.com/cic/mergedProjects/wh_ia/desktop/interaction_administrator_help.htm.

To configure Director server

1. On the Monitored Server, start Interaction Administrator and then click **Interaction Director**.



2. In the list view, double-click **Configuration**. The **Configuration** tab in the **Director Server Configuration** dialog box appears.



Site ID: Unique number that identifies this Director server. This ID cannot be the same as the site ID of a redundant Director server or any CIC server.

Call Routing Timeout (sec): Number of seconds that Director waits to route a call before timing out.

E-mail Routing Timeout (min): Number of minutes that Director waits to route an email message before timing out.

Refresh: Redisplays the redundancy state of this Director server.

Switch: Switches between redundancy states with the other Director server in the switchover pair.

3. Click **OK**.
4. To dump a trace log for Director server, in the list view, right-click **Configuration** and then click **Dump Server Trace**. A confirmation dialog box appears.
5. Click **Yes**. A notification dialog box appears.
6. Click **OK**. The system writes all current configuration information (such as sites, queues, users, skills, enterprise workgroups) to the trace log file.

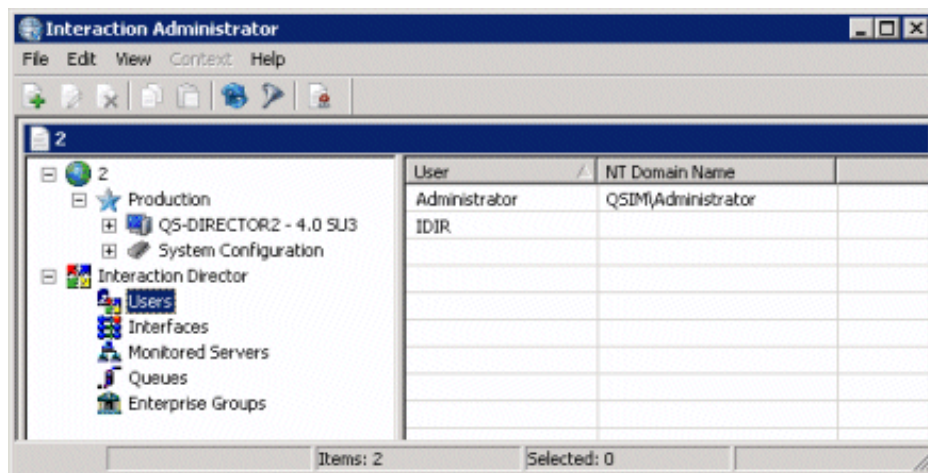
Users Container

The **Users** container in Interaction Administrator allows you to manage the users who can log into this Director server to change its configuration. Users must have an NT Domain user account and password. For more information, see the *Interaction Administrator Help* at https://help.genesys.com/cic/mergedProjects/wh_ia/desktop/interaction_administrator_help.htm.

View Interaction Director Users

To view Interaction Director users

- In the tree view, click the **Users** container. The users display in the **Users** list view.



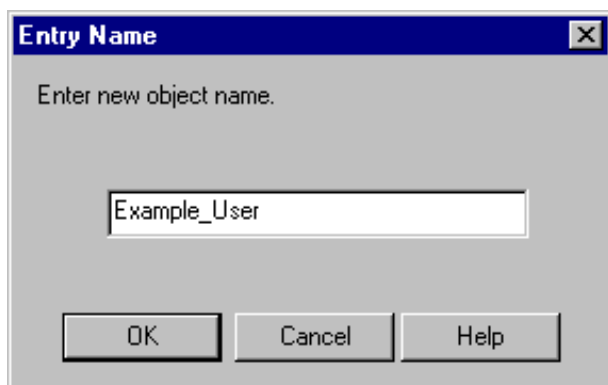
User: Name of the Interaction Director user.

NT Domain Name: Domain-qualified logon name for this user (for example, CorpDomain\waldowatson). CIC uses this name to authenticate that the CIC user has a valid NT account in the network domain.

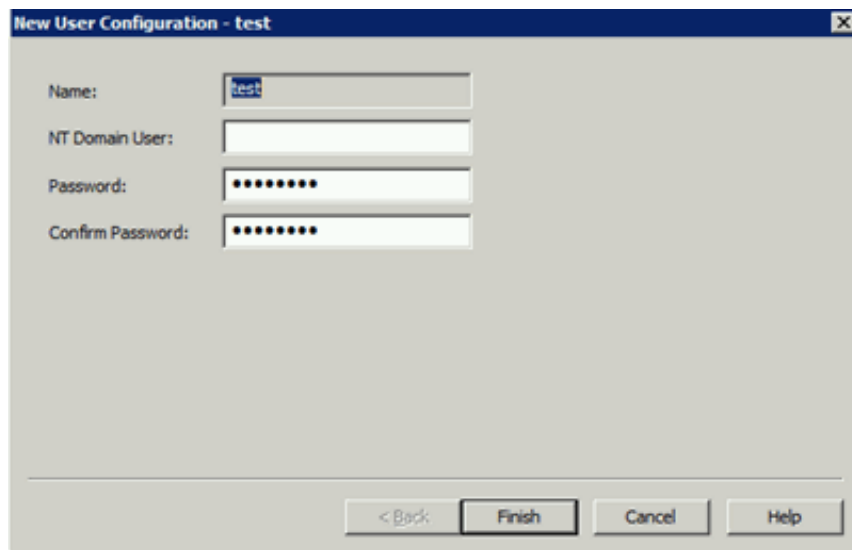
Add a User

To add a user

1. In the **Users** list view right-click in the list view and then click **New**. The **Entry Name** dialog box appears.



2. In the box, type the NT domain and user name (for example, mydomain\username) and then click **OK**. The **New User Configuration** dialog box appears.



The dialog box titled "New User Configuration - test" contains four input fields: "Name:" with the text "test", "NT Domain User:" which is empty, "Password:" with masked characters, and "Confirm Password:" with masked characters. At the bottom, there are four buttons: "< Back", "Finish", "Cancel", and "Help".

Name: Name of the Interaction Director user. You can specify any name that you want for identification purposes. There is no validation on this name.

NT Domain User: Domain-qualified logon name for this user (for example, CorpDomain\waldowatson). There is no validation on this name or browse capability to find a list of NT users. CIC uses this name to authenticate that the CIC user has a valid NT account in the network domain. When this CIC user logs on to the domain, the user can start any PureConnect program and CIC authenticates this user as a form of security. This feature prevents non-CIC users from starting a PureConnect program (such as Interaction Client) and running it on the network.

Password: NT domain password for the NT domain user.

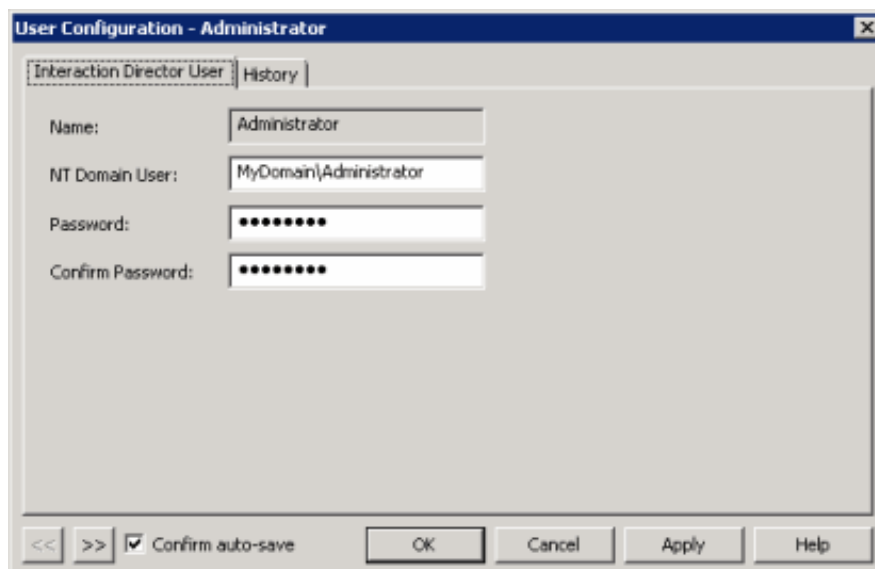
Confirm Password: NT domain password for the NT domain user to confirm that you typed the password correctly in the Password box.

3. Complete the information and then click **Finish**.

Modify a User

To modify a user

1. In the Users list view, right-click the user and then click **Properties**. The **User Configuration** dialog box appears.



The dialog box titled "User Configuration - Administrator" has a tabbed interface with "Interaction Director User" selected. It contains four input fields: "Name:" with the text "Administrator", "NT Domain User:" with the text "MyDomain\Administrator", "Password:" with masked characters, and "Confirm Password:" with masked characters. At the bottom, there are five buttons: "<<", ">>", "Confirm auto-save" (checked), "OK", "Cancel", "Apply", and "Help".

Name: Name of the user. You cannot change this name.

NT Domain User: Domain-qualified logon name for this user (for example, CorpDomain\waldowatson). There is no validation on this name or browse capability to find a list of NT users. CIC uses this name to authenticate that the CIC user has a valid NT account in the network domain. When this CIC user logs on to the domain, the user can start any

PureConnect program and CIC authenticates this user as a form of security. This feature prevents non-CIC users from starting a PureConnect program (such as Interaction Client) and running it on the network.

Password: NT domain password for the NT domain user.

Confirm Password: NT domain password for the NT domain user to confirm that you typed the password correctly in the **Password** box.

Confirm auto-save: If selected, allows you to modify multiple users.

2. Modify the information and then click **Apply**.
3. To modify the next user in the list view, do the following:
 - a. Select **Confirm auto-save**.
 - b. Click >>. The next user in the list appears.
4. When finished modifying users, click **OK**.

Delete a User

To delete a user

1. In the **Users** list view, right-click the user and then click **Delete**.
2. In the confirmation dialog box, click **Yes**.

Interfaces Container

The **Interfaces** container in Interaction Administrator allows you to manage boards and devices that interface with SIP. You can specify adapter, carrier, and protocol configurations. For more information, see the *Interaction Administrator Help* at https://help.genesys.com/cic/mergedProjects/wh_ia/desktop/interaction_administrator_help.htm.

Related topics:

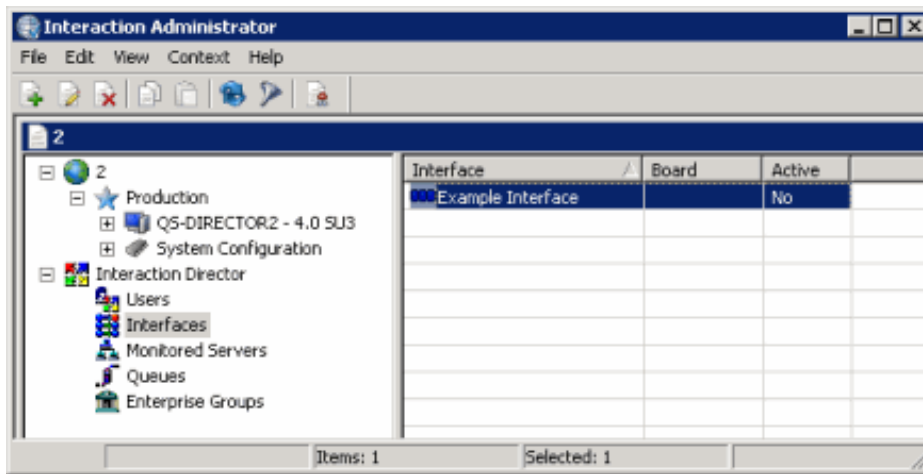
- [View Interaction Director Interfaces](#)
- [Add an Interface](#)
- [Modify an Interface](#)
- [Delete an Interface](#)

View Interaction Director Interfaces






The **Interfaces** list view in Interaction Administrator allows you to view Interaction Director interfaces.

To view Interaction Director interfaces

1. In the tree view, click the **Interfaces** container. The interfaces display in the **Interfaces** list view.



Status icon: Represents the status of the interface. Director polls the interface, Monitored Server, and queues every two minutes; and the software services and network links every 60 seconds. Director updates this status accordingly.

Icon	Description
	Inactive. Interface, Monitored Server, or queue is inactive.
	Not Running. Interface, Monitored Server, or queue is active but not running.
	Running. Interface plug-in is running.
	Initialized. Service is connected to the carrier network.
	Traffic. Data and requests are exchanging between the server and the carrier network.

Interface: User-defined name of the interface.

Board: Code that identifies the board. For Natural Microsystems boards, this number is between 1 and 16 and identifies the board to the NMS API.

Active: Indicates whether the interface is active.

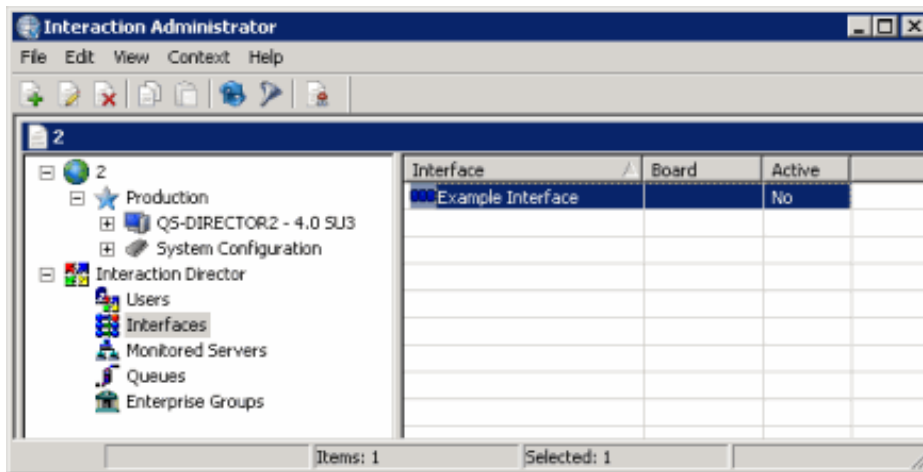
2. In the list view, right-click an interface and then do the following:
 - To activate or deactivate an interface, click **Set Active** and then click **Yes** or **No**.
 - To indicate to the network that the interface can receive traffic, click **Set in Service**.
 - To indicate to the network that the interface cannot receive traffic, click **Set out of Service**.
 - To send a request to the Director server to turn off the interface, click **Shut Down**. Use this option to prevent the loader from restarting the plug-in until you reactivate it using the **Set Active** option.
 - To send a request to the Director server to turn off and restart the interface, click **Restart**.
 - To send a notification to the Director server to write to a trace log the parameters that Interaction Director is using, click **Dump Parameters** and then, in the confirmation dialog box, click **Yes**. You define the location of the trace log in Interaction Administrator.

Add an Interface

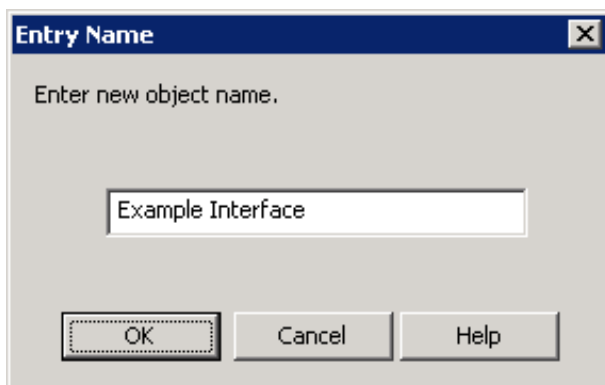
the **New Interface Configuration** wizard in Interaction Administrator allows you to add a SIP interface that defines hardware and protocols that Director uses to communicate with a SIP carrier.

To add an interface

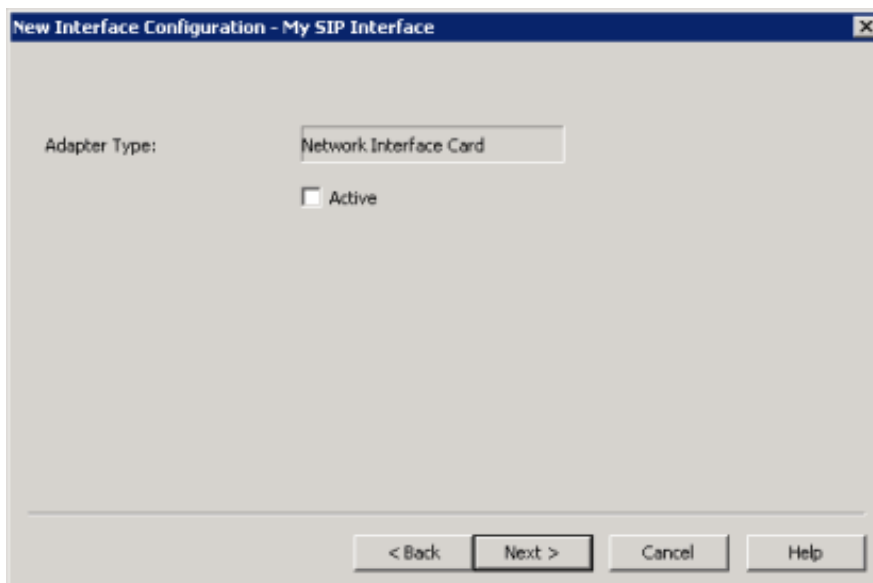
1. In the tree view, click the **Interfaces** container. The interfaces display in the **Interfaces** list view.



2. Right-click in the list view and then click **New**. The **Entry Name** dialog box appears.



3. In the box, type a descriptive name for the interface and then click **OK**. The **Adapter** page of the **New Interface Configuration** wizard appears.



Adapter Type: Type of network interface card that the SIP interface uses. You cannot change this value.

Active: If selected, the interface is active.

4. Select **Active** and then click **Next**. The **SIP Protocol** page of the **New Interface Configuration** wizard appears.

Protocol: Name of the carrier. You cannot change this value.

SIP Protocol: Type of SIP protocol.

UDP (User Datagram Protocol): Communications protocol that sends datagram messages from one computer to a program running on another computer. Since UDP is connectionless, the protocol does not guarantee error-free delivery. Programs that use UDP process any errors and check for reliable delivery. This option is best suited for a local network.

TCP (Transmission Control Protocol): Communications protocol that sends a sequenced delivery of bytes to a remote or local user. Since TCP establishes a connection, it is less error prone than UDP, but has greater overhead. This option is best suited when using a WAN.

Address to Use: Network interface for SIP communications.

Domain: SIP protocol domain.

Receive Port: Port that sends and receives SIP messages. The default value is "5060."

Maximum Packet Retry: Maximum number of attempted SIP requests when using UDP as the transport protocol. The default value is "10." This option is an advance UDP setting. Do not change the value except under the direction of PureConnect Customer Care.

Maximum Invite Retry: Maximum number of attempted SIP invite requests that PureConnect Customer Care instructs you to do when using UDP as the transport protocol. The default value is "6." This option is an advance UDP setting. Do not change the value except under the direction of PureConnect Customer Care.

T1 Timer (ms): Initial incremental delay between SIP packet retransmissions when using UDP as the transfer protocol. The default value is "500." This option is an advance UDP setting. Do not change the value except under the direction of PureConnect Customer Care.

T2 Timer (ms): Maximum incremental delay between SIP packet retransmissions, when using UDP as the transfer protocol. The default value is "4000." This option is an advance UDP setting. Do not change the value except under the direction of PureConnect Customer Care.

5. Complete the information and then click **Next**. The **Carrier** page of the **New Interface Configuration** wizard appears.

New Interface Configuration - My SIP Interface

Carrier: SIP

Local Transaction Timeout (ms): 400

< Back Next > Cancel Help

Carrier: Carrier for the interface. You cannot change this value.

Local Transaction Timeout (ms): Amount of time (in milliseconds) that Director server waits for a routing handler to respond before sending the default response to the carrier. A default response is a valid routing response, but it is not based on the real-time data. Define a default response in Interaction Director for each provisioned number. The default timeout value is 400 milliseconds.

- Complete the information and then click **Next**. The **SIP Provisioned Numbers** page of the **New Interface Configuration** wizard appears.

New Interface Configuration - My SIP Interface

SIP Provisioned Numbers

Phone Number	Enterprise Groups	Routing Action	Code

Add... Add Many... Modify... Delete

< Back Finish Cancel Help

Phone Number: Telephone number to which Interaction Director responds. These telephone numbers are the ones that customers use to contact your company, not the telephone numbers where calls route.

Enterprise Groups: Enterprise Group to which to route calls for a number.

Routing Action: Default routing action for the telephone number. Valid actions are:

- **Destination:** Termination destination for the call is a phone number.
- **Use Default:** Uses the SIP interface's default action to disposition the call.
- **DNS Override:** Allows override of the call's termination destination using digits that override the actual DNS.
- **Domestic DDD (Direct Distance Dialing):** Digits dialed to end the call.
- **International DDD (Direct Distance Dialing):** International digits dialed to end the international call.

Code: Default code to use for the routing action. This value is a string of 1-10 digits that are numeric (0-9), '#', or '*'.

- Do the following:

- To add a SIP provisioned phone number, routing action, and default code, do the steps to [Add a SIP Provisioned Number](#).
- To add multiple SIP carrier numbers, do the steps to [Add Multiple SIP Carrier Numbers](#).
- To modify a SIP provisioned phone number, routing action, or default code, do the steps to [Modify a SIP Provisioned Number](#).
- To delete a SIP provisioned number, do the steps to [Delete a SIP Provisioned Number](#).

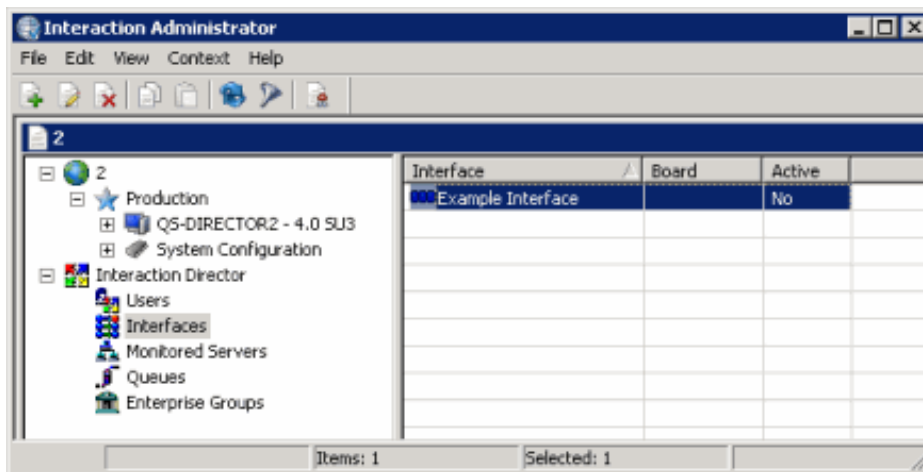
8. Complete the information and then click **Finish**.

Modify an Interface

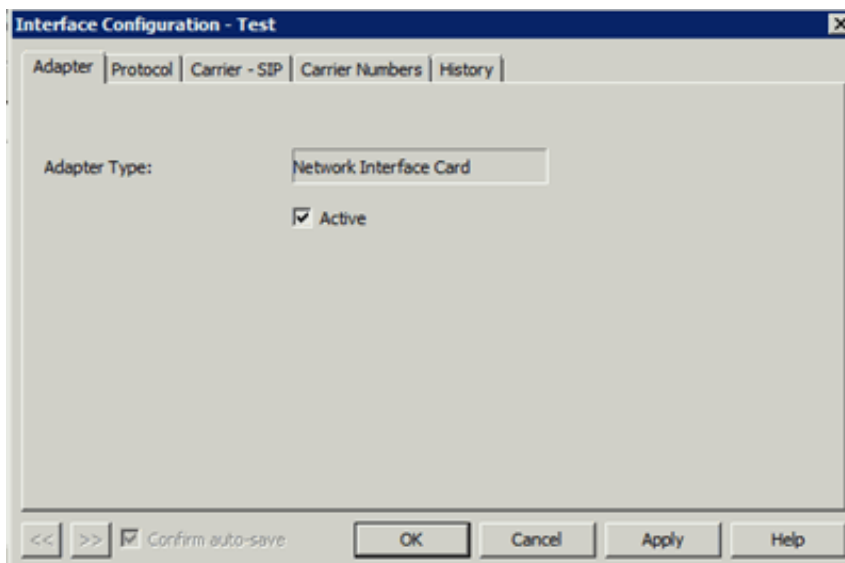
The **Interface Configuration** dialog box in Interaction Administrator allows you to modify a SIP interface that defines hardware and protocols that Director uses to communicate with a SIP carrier.

To modify an interface

1. In the tree view, click the **Interfaces** container. The interfaces display in the **Interfaces** list view.



2. Right-click the interface and then click **Properties**. The **Interface Configuration** dialog box appears.



3. To change the adapter to inactive, on the **Adapter** tab, clear the **Active** check box and then click **Apply**.
4. To change the protocol settings, do the following:
 - a. Click the **Protocol** tab.

Protocol: Name of the carrier. You cannot change this value.

SIP Protocol: Type of SIP protocol.

UDP (User Datagram Protocol): Communications protocol that sends datagram messages from one computer to a program running on another computer. Since UDP is connectionless, the protocol does not guarantee error-free delivery. Programs that use UDP process any errors and check for reliable delivery. This option is best suited for a local network.

TCP (Transmission Control Protocol): Communications protocol that sends a sequenced delivery of bytes to a remote or local user. Since TCP establishes a connection, it is less error prone than UDP, but has greater overhead. This option is best suited when using a WAN.

Address to Use: Network interface for SIP communications.

Domain: SIP protocol domain.

Receive Port: Port that sends and receives SIP messages. The default value is "5060."

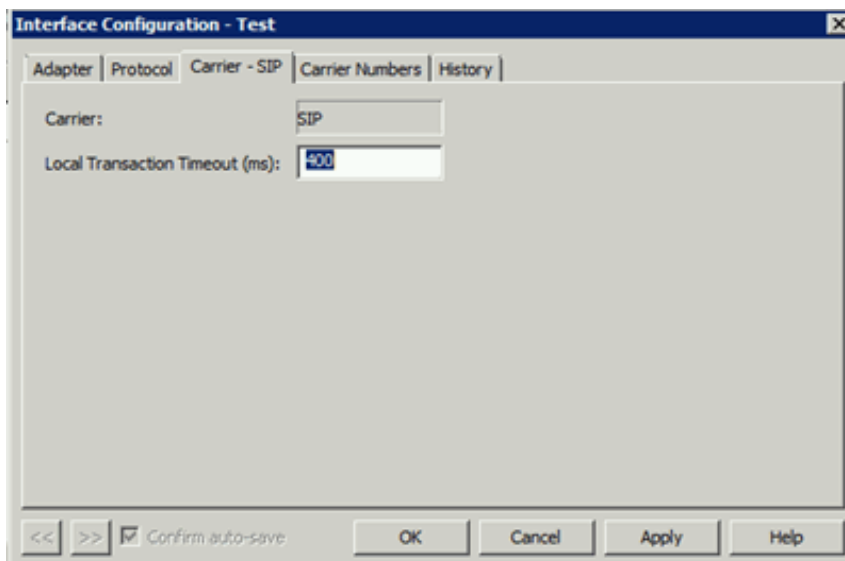
Maximum Packet Retry: Maximum number of attempted SIP requests when using UDP as the transport protocol. The default value is "10." This option is an advance UDP setting. Do not change the value except under the direction of PureConnect Customer Care.

Maximum Invite Retry: Maximum number of attempted SIP invite requests that PureConnect Customer Care instructs you to do when using UDP as the transport protocol. The default value is "6." This option is an advance UDP setting. Do not change the value except under the direction of PureConnect Customer Care.

T1 Timer (ms): Initial incremental delay between SIP packet retransmissions when using UDP as the transfer protocol. The default value is "500." This option is an advance UDP setting. Do not change the value except under the direction of PureConnect Customer Care.

T2 Timer (ms): Maximum incremental delay between SIP packet retransmissions, when using UDP as the transfer protocol. The default value is "4000." This option is an advance UDP setting. Do not change the value except under the direction of PureConnect Customer Care.

- b. Modify the information and then click **Apply**.
5. To change the carrier settings, do the following:
 - a. Click the **Carrier - SIP** tab.



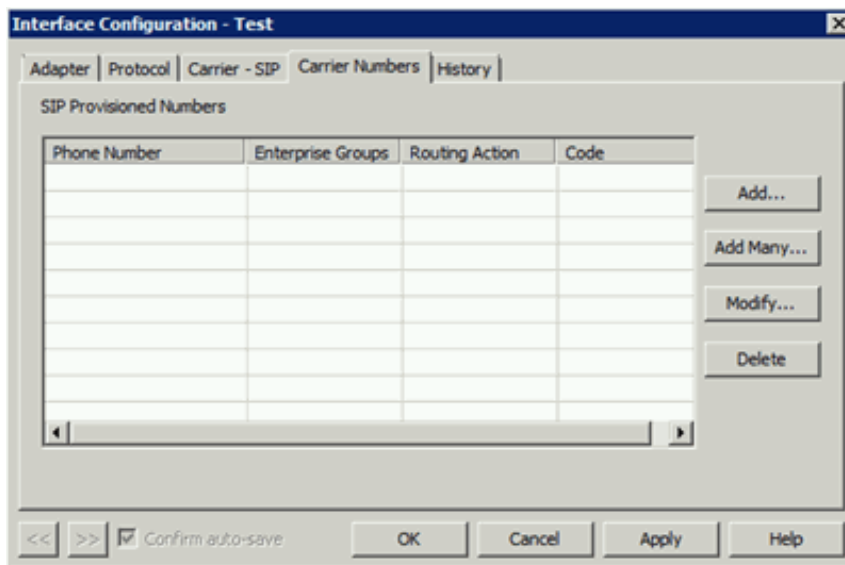
Carrier: Carrier for the interface. You cannot change this value.

Local Transaction Timeout (ms): Amount of time (in milliseconds) that Director server waits for a routing handler to respond before sending the default response to the carrier. A default response is a valid routing response, but it is not based on the real-time data. Define a default response in Interaction Director for each provisioned number. The default timeout value is 400 milliseconds.

b. Modify the information and then click **Apply**.

6. To change the carrier numbers, do the following:

a. Click the **Carrier Numbers** tab.



b. To add a SIP provisioned phone number, routing action, and default code, do the steps to [Add a SIP Provisioned Number](#).

c. To add multiple SIP carrier numbers, do the steps to [Add Multiple SIP Carrier Numbers](#).

d. To modify a SIP provisioned phone number, routing action, or default code, do the steps to [Modify a SIP Provisioned Number](#).

e. To delete a SIP provisioned number, do the steps to [Delete a SIP Provisioned Number](#).

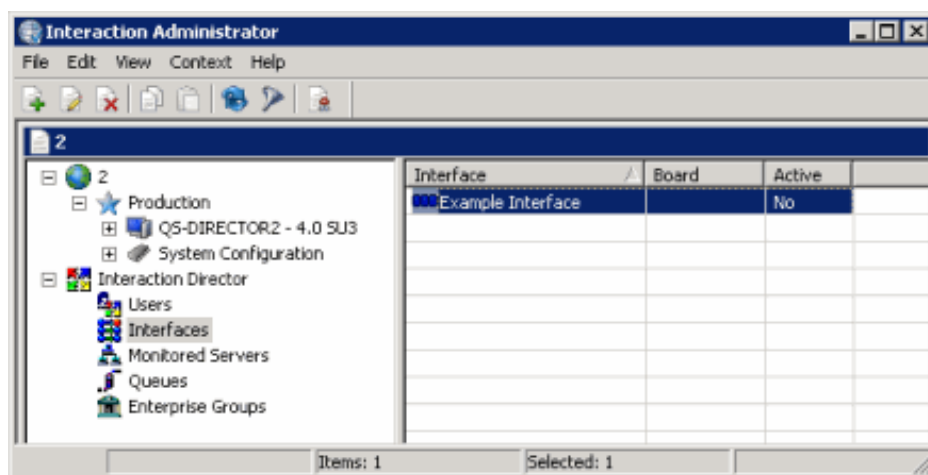
7. When finished, click **OK**.

Delete an Interface

The **Interfaces** list view in Interaction Administrator allows you to delete an interface.

To delete an interface

1. In the tree view, click the **Interfaces** container. The interfaces display in the **Interfaces** list view.



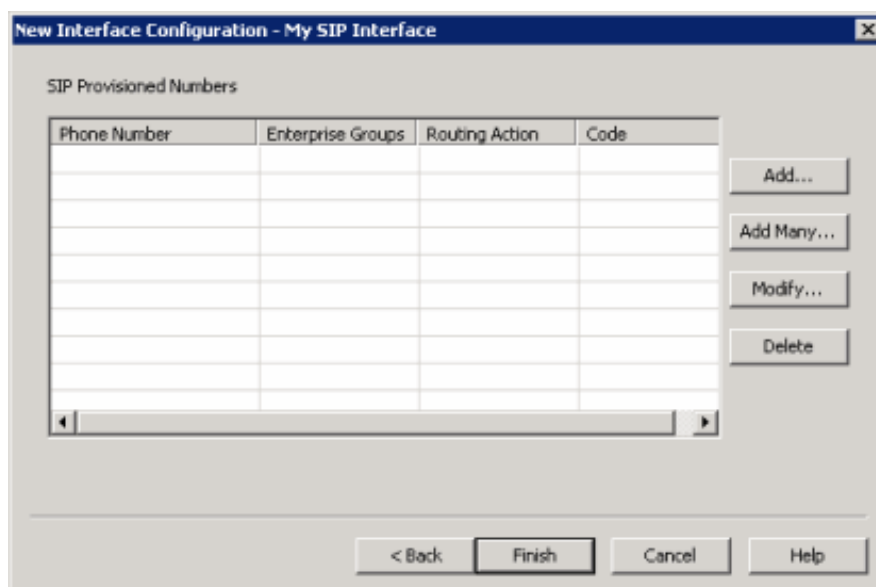
2. In the list view, do one of the following:
 - Click the interface and then press the **Delete** key.
 - Right-click the interface and then click **Delete**.
 - Click the interface and then, from the **Edit** menu, click **Delete**.
3. In the confirmation dialog box, click **Yes**.

Add a SIP Provisioned Number

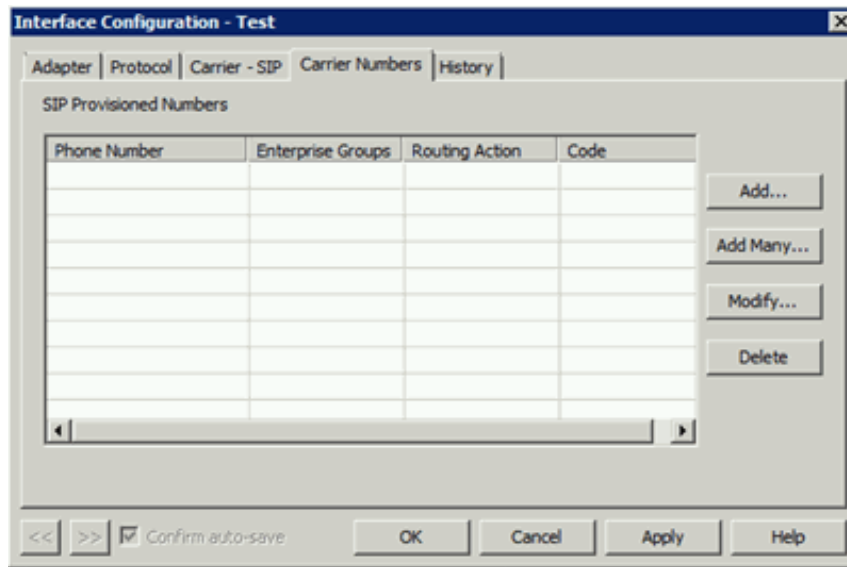
Use the **SIP Call Number and Default Routing** dialog box to add default SIP routing options, such as phone number, destination, and default code.

To add a SIP Provisioned Number

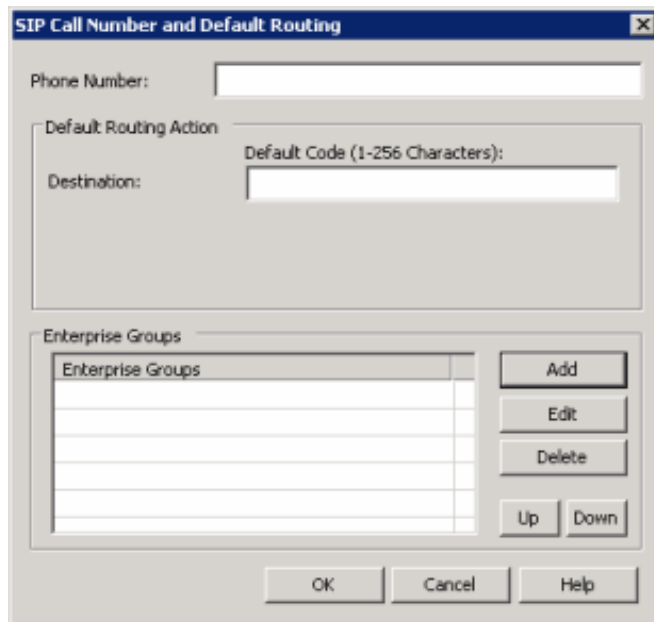
1. Do one of the following:
 - If you are adding an interface, open the **SIP Provisioned Numbers** page of the **New Interface Configuration** wizard. For more information, see [Add an Interface](#).



- If you are modifying an interface, open the **Carrier Numbers** tab in the **Interface Configuration** dialog box. For more information, see [Modify an Interface](#).



2. Click **Add**. The **SIP Call Number and Default Routing** dialog box appears.



Phone Number: Phone number for which to define a default routing action.

Destination: Termination destination for the call. Usually, this value is a phone number in the SIP format "sip:user@host:port," although it is possible that the originator of the request requires some other value or format. This value sends directly in the routing response as the redirect number. If the destination is a Director-connected CIC server (Monitored Server), the format is "sip:I3DIR!workgroupname@ipaddress" where "workgroupname" is the name of a workgroup on the destination CIC server and "IP address" is the address of the destination CIC server.

3. To add an enterprise group, do the following:
 - a. Click **Add**. The **Browse Enterprise Groups** dialog box appears.



Enterprise Group: Name of the enterprise group to which to route calls.

Enterprise Groups: Available enterprise groups defined using the **Enterprise Groups** container.

- b. Type or click the name of the enterprise group and then click **OK**.
4. To modify an enterprise group that you added manually or to select another enterprise group, do the following:
 - a. Click **Edit**. The **Browse Enterprise Groups** dialog box appears.



Enterprise Group: Name of the enterprise group to which to route calls.

Enterprise Groups: Available enterprise groups defined using the **Enterprise Groups** container.

- b. Type or click the name of the enterprise group and then click **OK**.
5. To remove an enterprise group from the list, do the following:
 - a. In the **Enterprise Groups** box, click the enterprise group and then click **Delete**. A confirmation dialog box appears.
 - b. Click **Yes**. The system removes the enterprise group from the list. The system doesn't remove the enterprise group from the **Enterprise Groups** container.
6. To rearrange the order of the enterprise groups, click an enterprise group and then click **Up** or **Down**. Director evaluates the groups in top-down order when routing calls.
7. In the **SIP Call Number and Default Routing** dialog box, click **OK**.
8. Do one of the following:

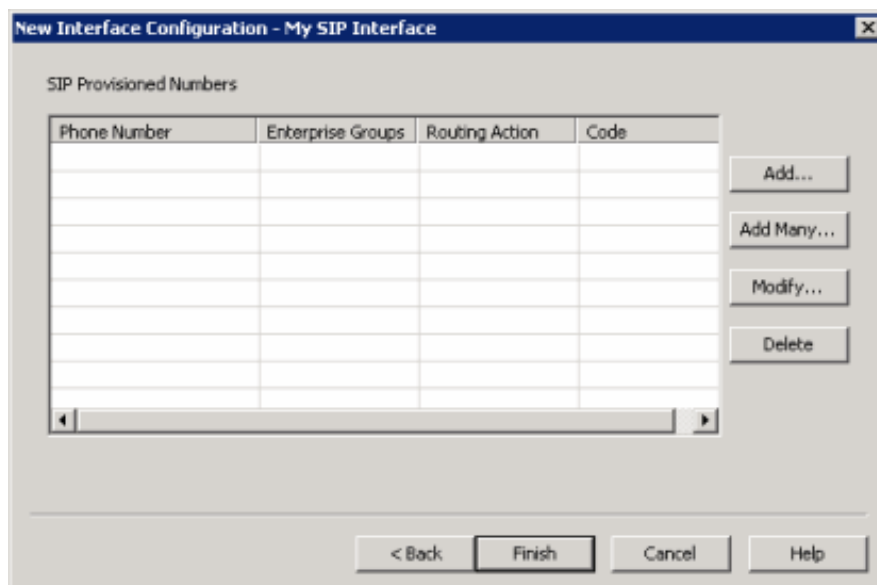
- In the **New Interface Configuration** wizard, click **Finish**.
- In the **Interface Configuration** dialog box, click **OK**.

Modify a SIP Provisioned Number

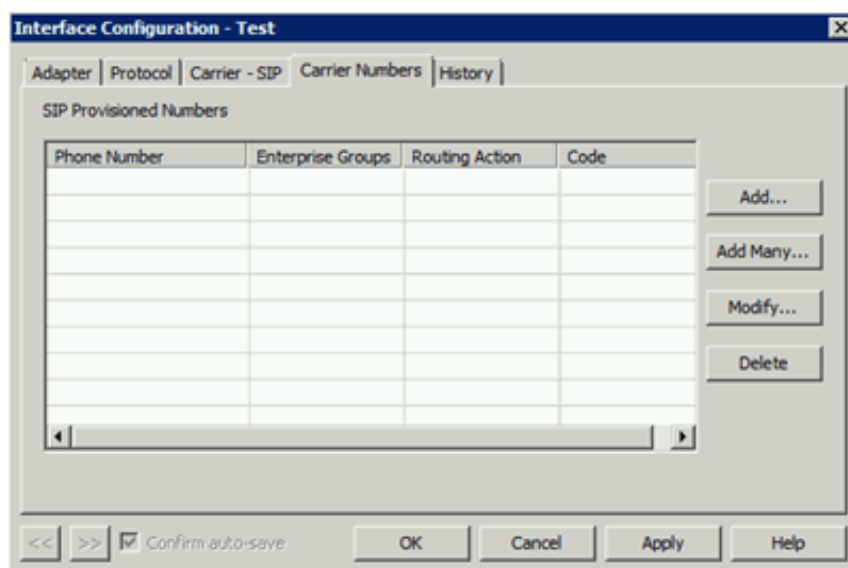
Use the **SIP Call Number and Default Routing** dialog box to modify default SIP routing options, such as phone number, destination, and default code.

To modify a SIP Provisioned Number

1. Do one of the following:
 - If you are adding an interface, open the **SIP Provisioned Numbers** page of the **New Interface Configuration** wizard. For more information, see [Add an Interface](#).



- If you are modifying an interface, open the **Carrier Numbers** tab in the **Interface Configuration** dialog box. For more information, see [Modify an Interface](#).



2. Click **Modify**. The **SIP Call Number and Default Routing** dialog box appears.

The dialog box is titled "SIP Call Number and Default Routing". It contains the following fields and controls:

- Phone Number:** A text input field.
- Default Routing Action:** A section containing:
 - Destination:** A text input field.
 - Default Code (1-256 Characters):** A text input field.
- Enterprise Groups:** A list box containing several empty rows. To its right are buttons: **Add**, **Edit**, **Delete**, **Up**, and **Down**.
- At the bottom are **OK**, **Cancel**, and **Help** buttons.

Phone Number: Phone number for which to define a default routing action.

Destination: Termination destination for the call. Usually, this value is a phone number in the SIP format "sip:user@host:port," although it is possible that the originator of the request requires some other value or format. This value sends directly in the routing response as the redirect number. If the destination is a Director-connected CIC server (Monitored Server), the format is "sip:l3DIR!workgroupname@ipaddress" where "workgroupname" is the name of a workgroup on the destination CIC server and "IP address" is the address of the destination CIC server.

Enterprise Groups: Name of the enterprise groups to which to route calls.

3. To add an enterprise group, do the following:
 - a. Click **Add**. The **Browse Enterprise Groups** dialog box appears.

The dialog box is titled "Browse Enterprise Groups". It contains the following fields and controls:

- Enterprise Group:** A text input field.
- Enterprise Groups:** A list box containing the following items: "KumaEnterprise", "Sales_EG", and "Sales_EG2".
- At the bottom are **Refresh**, **OK**, and **Cancel** buttons.

Enterprise Group: Name of the enterprise group to which to route calls.

Enterprise Groups: Available enterprise groups that you can route calls to.

- b. Type or click the name of the enterprise group and then click **OK**.
4. To modify an enterprise group that you added manually or to select another enterprise group, do the following:
 - a. Click **Edit**. The **Browse Enterprise Groups** dialog box appears.



Enterprise Group: Name of the enterprise group to route calls to.

Enterprise Groups: Available enterprise groups you can select to route calls to.

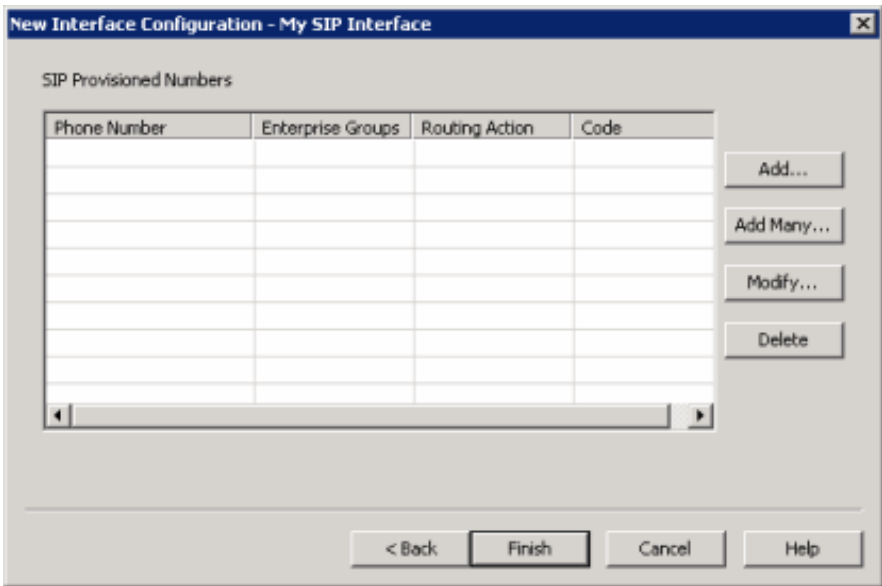
- b. Type or click the name of the enterprise group and then click **OK**.
5. To remove an enterprise group from the list, do the following:
 - a. In the **Enterprise Groups** box, click the enterprise group and then click **Delete**. A confirmation dialog box appears.
 - b. Click **Yes**. The system removes the enterprise group from the list. The system doesn't remove the enterprise group from the **Enterprise Groups** container.
6. To rearrange the order of the enterprise groups, click an enterprise group and then click **Up** or **Down**. Director evaluates the groups in top-down order when routing calls.
7. In the **SIP Call Number and Default Routing** dialog box, click **OK**.
8. Do one of the following:
 - In the **New Interface Configuration** wizard, click **Finish**.
 - In the **Interface Configuration** dialog box, click **OK**.

Delete a SIP Provisioned Number

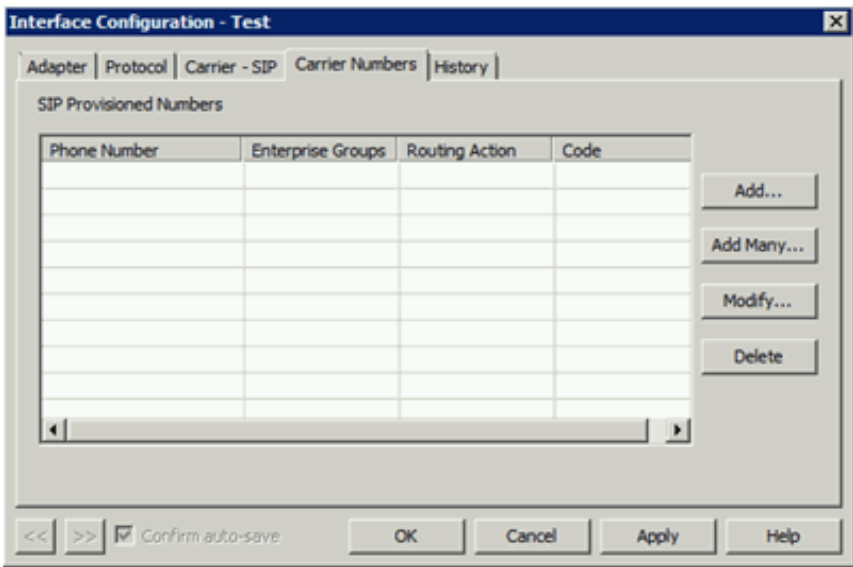
Use the SIP Provisioned Numbers page of the New Interface Configuration wizard or the Carrier Numbers tab in the Interface Configuration dialog box to delete a SIP provisioned number.

To delete a SIP Provisioned Number

1. Do one of the following:
 - If you are adding an interface, open the SIP Provisioned Numbers page of the New Interface Configuration wizard. For more information, see [Add an Interface](#).



- If you are modifying an interface, open the Carrier Numbers tab in the Interface Configuration dialog box. For more information, see [Modify an Interface](#).



2. Click the provisioned number and then click **Delete**. A confirmation dialog box appears.
3. Click **Yes**.

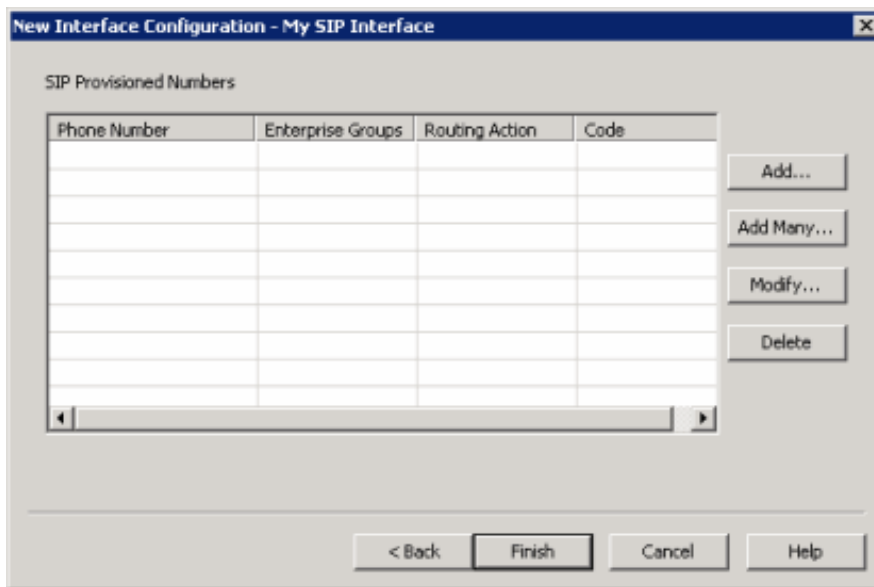
Add Multiple SIP Carrier Numbers

Use the SIP Add Many Carrier Numbers dialog box to specify a line-delimited list of SIP carrier numbers, or import a list of SIP carrier numbers from a file.

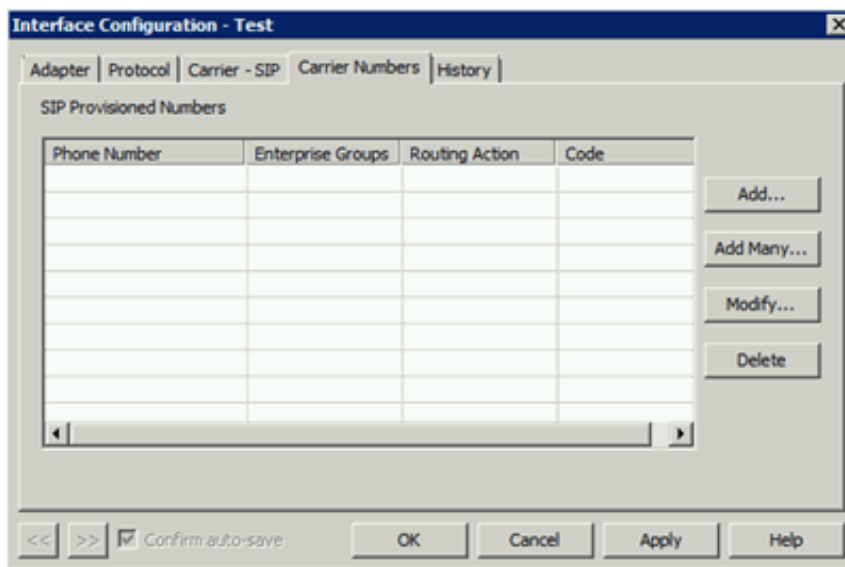
To add multiple SIP carrier numbers

1. Do one of the following:

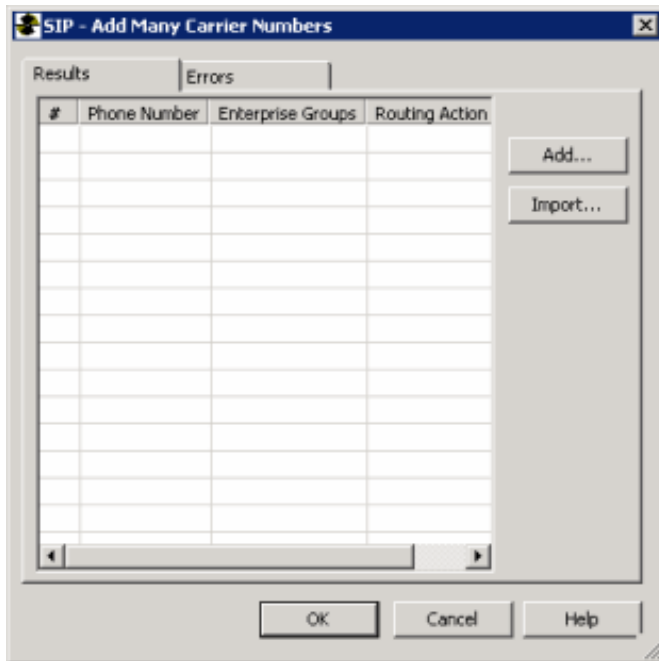
- If you are adding an interface, open the SIP Provisioned Numbers page of the **New Interface Configuration** wizard. For more information, see [Add an Interface](#).



- If you are modifying an interface, open the **Carrier Numbers** tab in the **Interface Configuration** dialog box. For more information, see [Modify an Interface](#).



2. Click **Add Many**. The **Results** tab of the **SIP - Add Many Carrier Numbers** dialog box appears. This tab displays the data items parsed from each line of input data.



#: Number of the line in the file that contains the parsed data.

Phone Number: Phone number to which Interaction Director responds. This number is the one that customers use to contact your company, not the phone number where calls route.

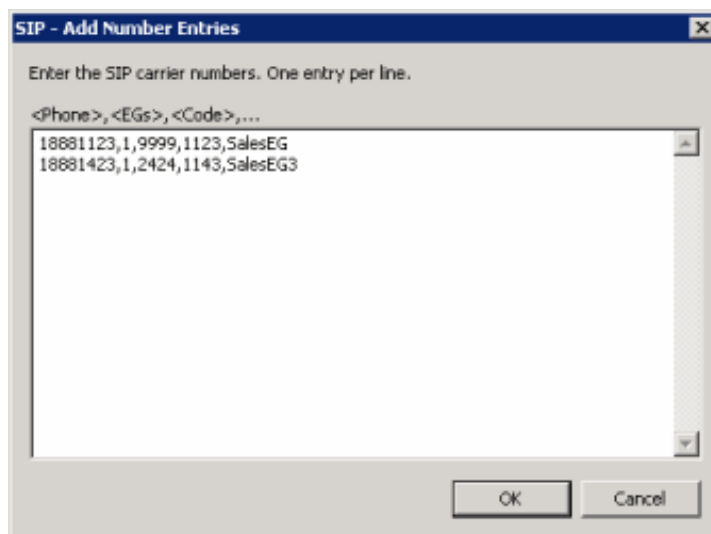
Enterprise Groups: Enterprise group to which to route calls for the phone number.

Routing Action: Default routing action for the phone number. Valid actions are:

- **Destination:** Termination destination for the call is a phone number.
- **Use Default:** Uses the SIP interface's default action to disposition the call.
- **DNS Override:** Allows override of the call's termination destination using digits that override the DNS.
- **Domestic DDD (Direct Distance Dialing):** Digits dialed to end the call.
- **International DDD (Direct Distance Dialing):** International digits dialed to end the call.

Code: Default code to use for the routing action. This value is a string of 1-10 digits that are numeric (0-9), '#', or '*'.

3. To add a list of SIP carrier numbers, do the following:
 - a. Click **Add**. The **SIP - Add Number Entries** dialog box appears.



Examples

17005555,3,1AlphaBravo,123456789012345,SalesEG

17007777,5,

17006666,4,1234567890

18887776, 1, 2

b. To type the values in the box, on a single line, type the following, separating each with a comma:

- Phone number.
- Routing action code. Valid values are:

Routing Action Code	Description
1	Destination. The termination destination for the call is a phone number.
2	Use Default. Uses SIP's default action to disposition the call.
3	DNIS Override. Overrides the call's termination destination.
4	Domestic Digits. Digits dialed to end the call.
5	International Digits. Digits dialed to end the international call.

- Default code for the routing action.

Routing Action Code is...	Description
1	Specify up to a 256-character code.
2	Leave blank.
3	Specify up to a 256-character code.
4	Specify a 10-digit code.
5	Specify a 2- to 14-digit code.

- DNIS override digits. If the routing action is 3, specify up to a 15-digit DNIS override code.
- Enterprise group.

c. To add another entry, press **Return** and then type the values in the box.

d. To copy and paste the values into the box, copy the values, click in the box, and then paste the values.

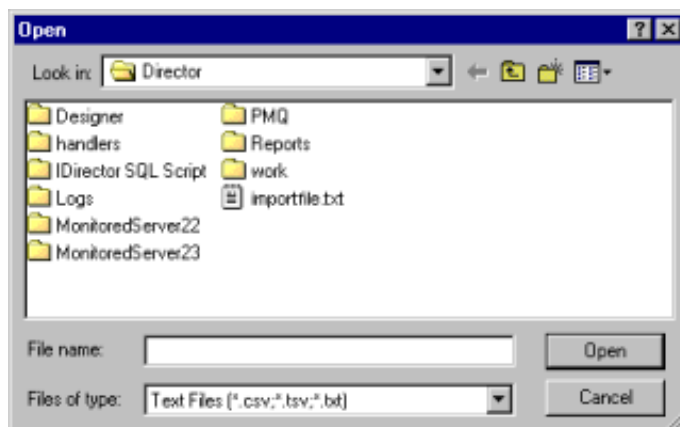
Note:

For blank values, use a comma as a placeholder.

e. Click **OK**.

4. To import a list of SIP carrier numbers, do the following:

a. Click **Import**. The **Open** dialog box appears.



b. Click the name of the file to import and then click **Open**.

5. To view rejected records that didn't parse successfully, click the **Errors** tab.
6. If the import file contains errors, click **Cancel**, edit the file, and then import the edited file.
7. Click OK.

Monitored Servers Container

The **Monitored Servers** container in Interaction Administrator allows you to manage Monitored Servers. A Monitored Server is a CIC site to which Director routes calls. For more information, see the *Interaction Administrator Help* at https://help.genesys.com/cic/mergedProjects/wh_ia/desktop/interaction_administrator_help.htm.

Related topics:

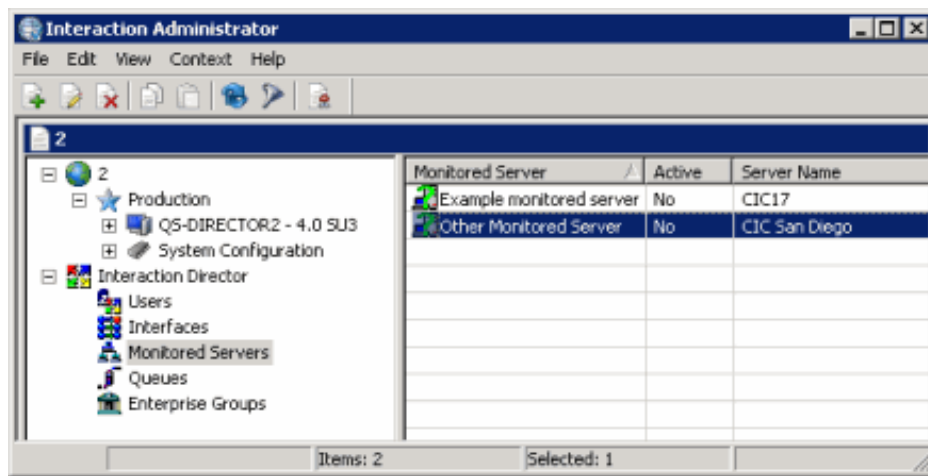
- [View Interaction Director Monitored Servers](#)
- [Add a Monitored Server](#)
- [Modify a Monitored Server](#)
- [Delete a Monitored Server](#)
- [Configure SIP Lines to Support Release Link Transfer](#)
- [Multi-server Email Routing Using Director](#)
- [Specific Target Routing](#)

View Interaction Director Monitored Servers




The **Monitored Servers** list view in Interaction Administrator allows you to view Interaction Director's Monitored Servers.

To view Interaction Director's Monitored Servers

1. In the tree view, click the **Monitored Servers** container. The Monitored Servers display in the **Monitored Servers** list view.



Status icon: Status of Director's network link to the CIC site. Director polls the sites every two minutes and updates this status accordingly.

Icon	Description
	Site is available.
	Site is not available.
	Undetermined link status.

Monitored Server: CIC server to which Director can route calls.

Active: Indicates whether the server can receive calls that Director routes to it. Only active servers can receive calls.

Server Name: IP address or host name of the monitored CIC server.

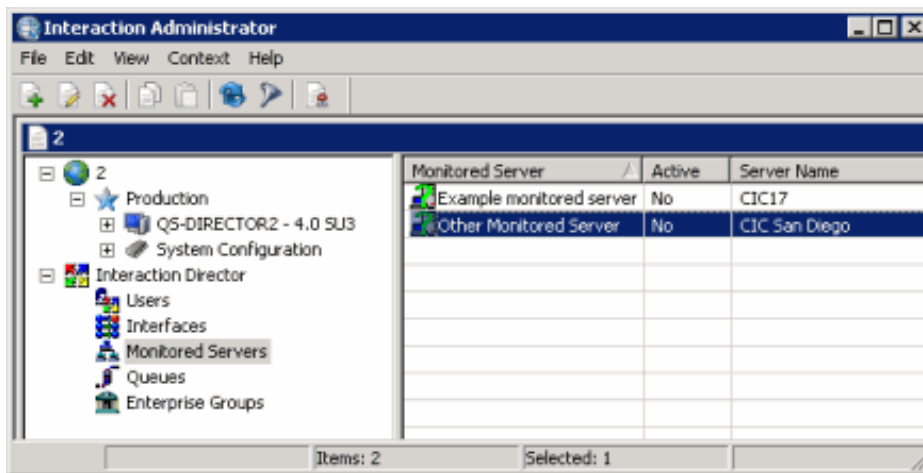
2. To activate or deactivate an enterprise group, in the list view, right-click the enterprise group, click **Set Active**, and then click **Yes** or **No**. Only active enterprise groups can receive calls.

Add a Monitored Server

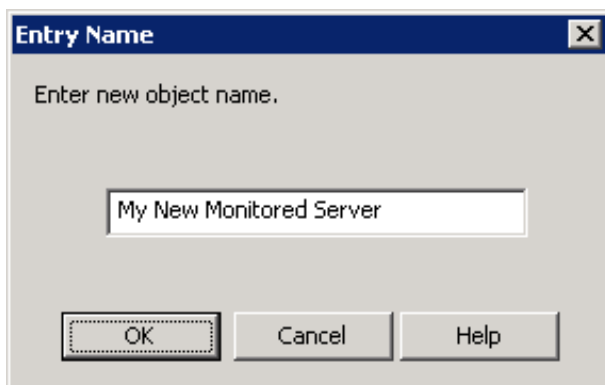
The **Monitored Servers** list view in Interaction Administrator allows you to add a Monitored Server.

To add a Monitored Server

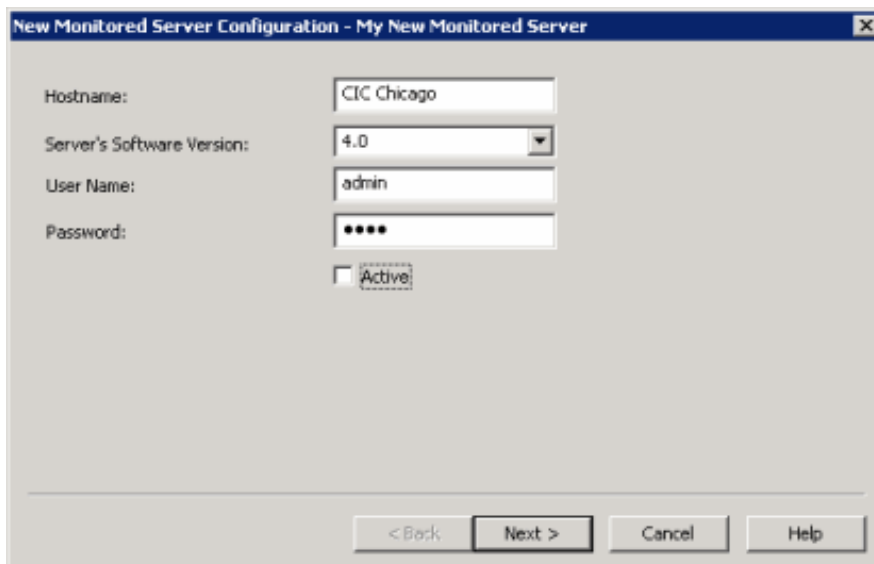
1. In the tree view, click the **Monitored Servers** container. The Monitored Servers display in the **Monitored Servers** list view.



2. Right-click in the list view and then click **New**. The **Entry Name** dialog box appears.



3. In the box, type a descriptive name to identify the Monitored Server and then click **OK**. The **New Monitored Server Configuration** wizard appears.



Host Name: Name or IP address of the Monitored Server.

Server's Software Version: Version of CIC running on the monitored server. The "Site version" server parameter contains the list of known supported versions.

User Name: CIC user name to log on to the site's server. You define the CIC user name at the CIC site that you are configuring.

Password: CIC password for the user name.

4. Complete the information and then click **Next**. The next page of the wizard appears.

New Monitored Server Configuration - Test

Specify other servers that this monitored server can route to.

Server Name	Called A...	Calling ...	Line G...	Interaction ID Via

Add... Edit... Delete Up Down

< Back Next > Cancel Help

5. Do the following:
 - a. Click **Add**. The **Routing Map Destination Configuration** dialog box appears.

Routing Map Destination Configuration

Server Name: Example monitored server

Called Address: 5554444

Calling Address:

Line Group: ...

Send Interaction Identifier as:

- ☐ Called Address
- ☐ DTMF
- ☒ Calling Address

DTMF Code:

DTMF Code: 91

Wait time: 2

OK Cancel Help

Server Name: Name of the Monitored Server to route this Monitored Server to when routing interactions between servers.

Called Address: Called number of the T1/E1 or ISDN tie line for the Monitored Server specified in the **Server Name** box. This phone number connects the servers.

Calling Address: Calling number of the ISDN tie line that connects this Monitored Server and the server specified in the **Server Name** box. The system places the interaction ID information in the origination information of the extended place call tool. If the tie line is not ISDN, specify the ANI/DNIS configuration for the interface on both CIC servers. For a T1/E1 line, leave this box blank.

Line Group: Line group for Director to use when routing calls from this Monitored Server to the server specified in the **Server Name** box. For a T1/E1 line, leave this box blank.

Send Interaction Identifier as: These options configure signaling attributes that identify the interaction when it routes to the server.

Called Address: If selected, places the called number of the tie line in the dial string of the extended place call tool. If the tie line is not ISDN, specify the ANI/DNIS configuration for the interface on both CIC servers.

DTMF: (Dual-Tone Multi-Frequency) If selected, plays digits to navigate an IVR. The interaction ID information plays as tones after the call connects, the wait time passes, and the DTMF code plays. Select this option when you have a dedicated T1/E1 tie line between servers.

Calling Address: If selected, places the calling number of the tie line in the dial string of the extended place call tool. If the tie line is not ISDN, specify the ANI/DNIS configuration for the interface on both CIC

servers.

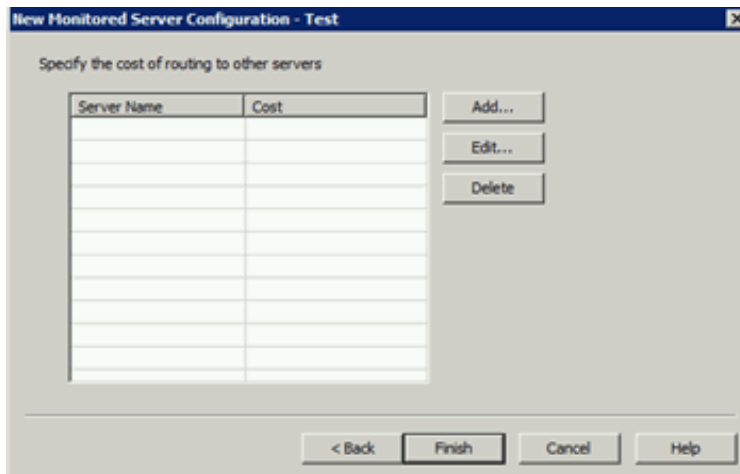
DTMF Code: Code to play when sending an interaction ID between servers connected by a T1/IE tie line.

Wait time: Number of seconds to wait to play in interaction ID as tones.

Important!

If you selected the **DTMF** option for servers connected by a T1/IE tie line, change the handler on each Monitored Server. For more information, see [Handler Change for T1 Tie Lines](#).

- a.
 - b. Complete the information.
 - c. Add more routing maps as necessary.
 - d. To rearrange the routing order, click a server and then click **Up** or **Down**.
 - e. Click **OK**.
6. Click **Next**. The next page of the wizard appears.

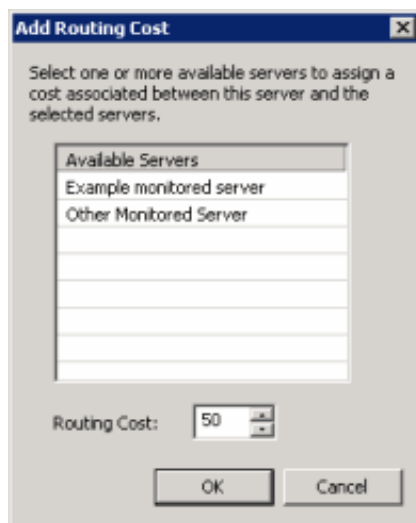


The dialog box titled "New Monitored Server Configuration - Test" contains the instruction "Specify the cost of routing to other servers". It features a table with two columns: "Server Name" and "Cost". To the right of the table are three buttons: "Add...", "Edit...", and "Delete". At the bottom of the dialog are four buttons: "< Back", "Finish", "Cancel", and "Help".

7. Do the following:
- a. Click **Add**. The **Add Routing Cost** dialog box appears.

Note:

If all defined Monitored Servers have assigned routing costs, a notification dialog box appears, indicating that all available servers have routing costs assigned. Click **OK**.



The dialog box titled "Add Routing Cost" contains the instruction "Select one or more available servers to assign a cost associated between this server and the selected servers." It features a list box labeled "Available Servers" with two entries: "Example monitored server" and "Other Monitored Server". Below the list box is a "Routing Cost:" label followed by a numeric input field containing the value "50". At the bottom are "OK" and "Cancel" buttons.

Available Servers: Available servers to which to assign a routing cost.

Routing Cost: Numeric value (from 1 to 100) used to weight the relative cost of routing to other Monitored Servers. The default value is 50 for any server not assigned a specific value. Higher numbers signify more costly routing.

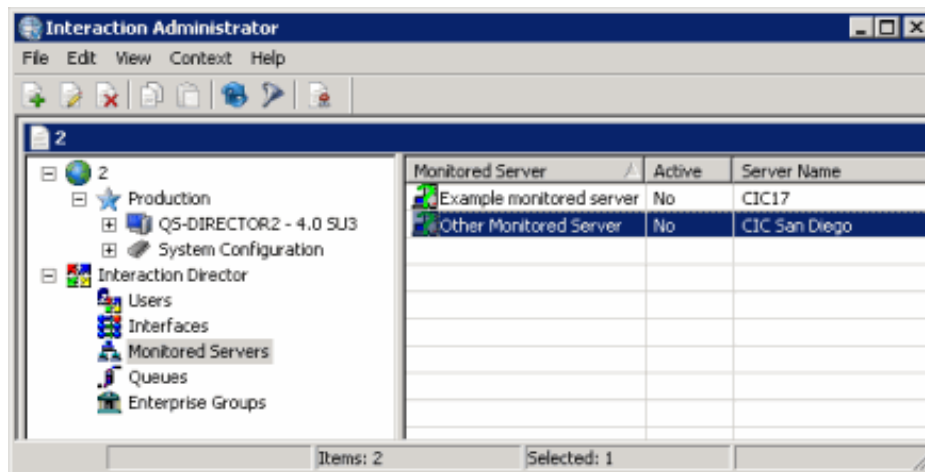
- b. Click a server and then type or select the routing cost.
 - c. Click **OK**.
8. Assign costs to other servers as necessary.
9. To delete a routing cost, click the server and then click **Delete**. The system doesn't ask you to confirm this operation so use caution when deleting a cost.
10. Click **Finish**.

Modify a Monitored Server

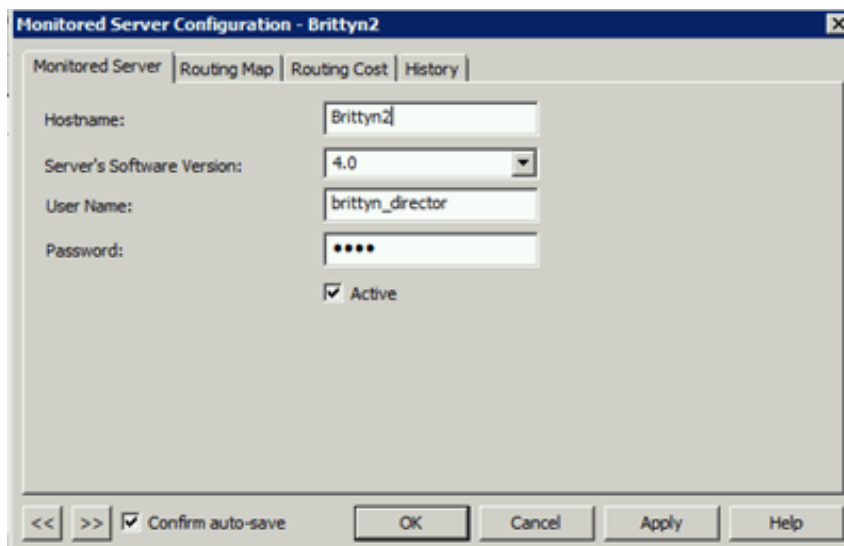
The **Monitored Servers** list view in Interaction Administrator allows you to modify a Monitored Server.

To modify a Monitored Server

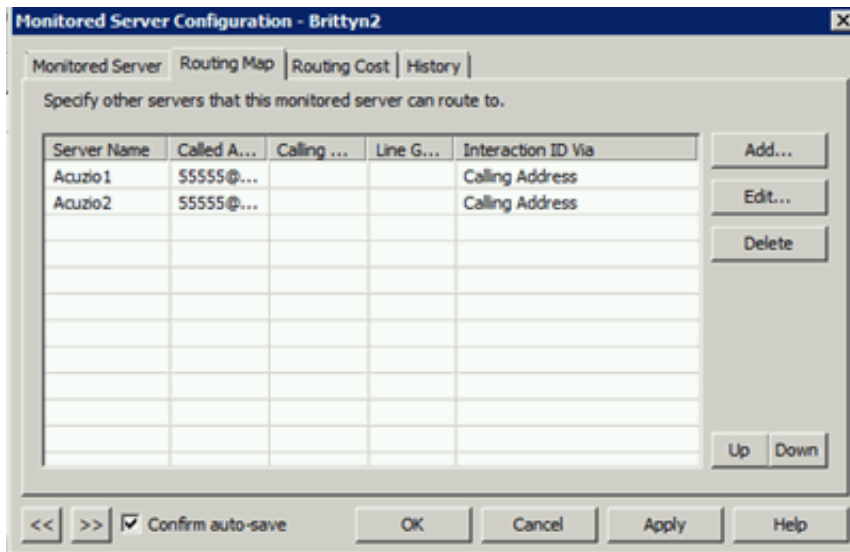
1. In the tree view, click the **Monitored Servers** container. The Monitored Servers display in the **Monitored Servers** list view.



2. Right-click the server and then click **Properties**. The **Monitored Server Configuration** dialog box appears.

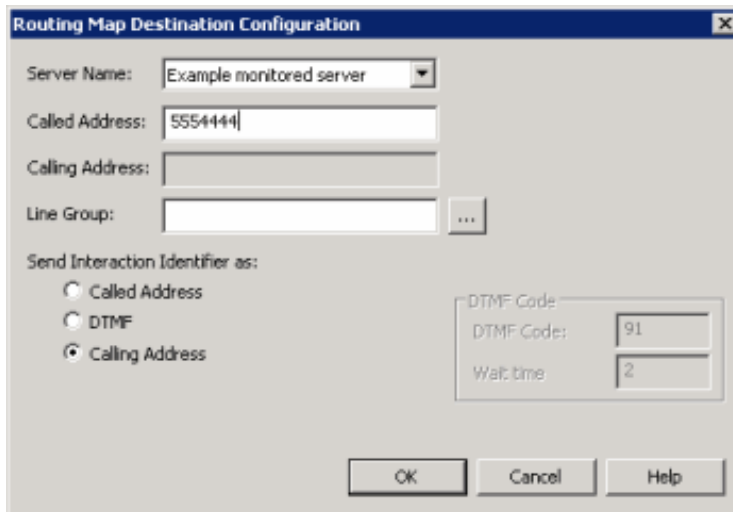


3. Modify the information and then click **Apply**.
4. Click the **Routing Map** tab.



5. Do the following:

- a. To add a routing map, click **Add** or to modify a routing tab, click a server and then click **Edit**. The **Routing Map Destination Configuration** dialog box appears.



Server Name: Name of the Monitored Server to route this Monitored Server to when routing interactions between servers.

Called Address: Called number of the T1/E1 or ISDN tie line for the Monitored Server specified in the **Server Name** box. This phone number connects the servers.

Calling Address: Calling number of the ISDN tie line that connects this Monitored Server and the server specified in the **Server Name** box. The system places the interaction ID information in the origination information of the extended place call tool. If the tie line is not ISDN, specify the ANI/DNIS configuration for the interface on both CIC servers. For a T1/E1 line, leave this box blank.

Line Group: Line group for Director to use when routing calls from this Monitored Server to the server specified in the **Server Name** box. For a T1/E1 line, leave this box blank.

Send Interaction Identifier as: These options configure signaling attributes that identify the interaction when it routes to the server.

Called Address: If selected, places the called number of the tie line in the dial string of the extended place call tool. If the tie line is not ISDN, specify the ANI/DNIS configuration for the interface on both CIC servers.

DTMF: (Dual-Tone Multi-Frequency) If selected, plays digits to navigate an IVR. The interaction ID information plays as tones after the call connects, the wait time passes, and the DTMF code plays. Select this option when you have a dedicated T1/E1 tie line between servers.

Calling Address: If selected, places the calling number of the tie line in the dial string of the extended

place call tool. If the tie line is not ISDN, specify the ANI/DNIS configuration for the interface on both CIC servers.

DTMF Code: Code to play when sending an interaction ID between servers connected by a T1/IE tie line.

Wait time: Number of seconds to wait to play in interaction ID as tones.

Important: If you selected the **DTMF** option for servers connected by a T1/IE tie line, change the handler on each Monitored Server. For more information, see [Handler Change for T1 Tie Lines](#).

b. Complete the information and then click **OK**.

6. Click the **Routing Cost** tab.

The dialog box titled "Monitored Server Configuration - Brittyn2" has four tabs: "Monitored Server", "Routing Map", "Routing Cost" (selected), and "History". The "Routing Cost" tab contains the instruction "Specify the cost of routing to other servers". Below this is a table with two columns: "Server Name" and "Cost". To the right of the table are three buttons: "Add...", "Edit...", and "Delete". At the bottom of the dialog are navigation buttons "<<" and ">>", a checked checkbox for "Confirm auto-save", and "OK", "Cancel", "Apply", and "Help" buttons.

7. To add a routing cost, do the following:

a. On the **Routing Cost** tab, click **Add**. The **Add Routing Cost** dialog box appears.

The "Add Routing Cost" dialog box contains the instruction "Select one or more available servers to assign a cost associated between this server and the selected servers." Below this is a list box titled "Available Servers" containing the entries "Acuzio1", "Acuzio2", "Brittyn1", and "Test". At the bottom, there is a "Routing Cost" label followed by a numeric input field containing the value "50". At the very bottom are "OK" and "Cancel" buttons.

Available Servers: Available Monitored Servers.

Routing Cost: Numeric value (from 1 to 100) used to weight the relative cost of routing to other Monitored Servers. The default value is 50 for any server not assigned a specific value. Higher numbers signify more costly routing.

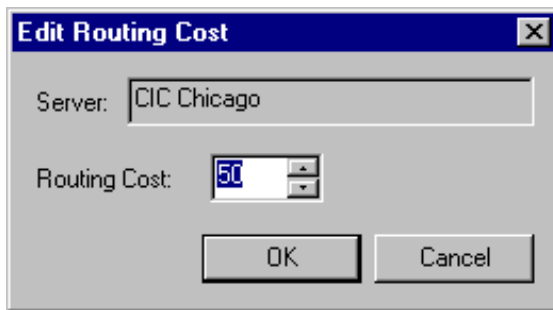
b. In the **Available Servers** box, click the available server.

c. In the **Add Routing Cost** dialog box, type or select the routing cost.

d. Click **OK**.

8. To modify a routing cost, do the following:

a. On the **Routing Cost** tab, click a server and then click **Edit**. The **Edit Routing Cost** dialog box appears.



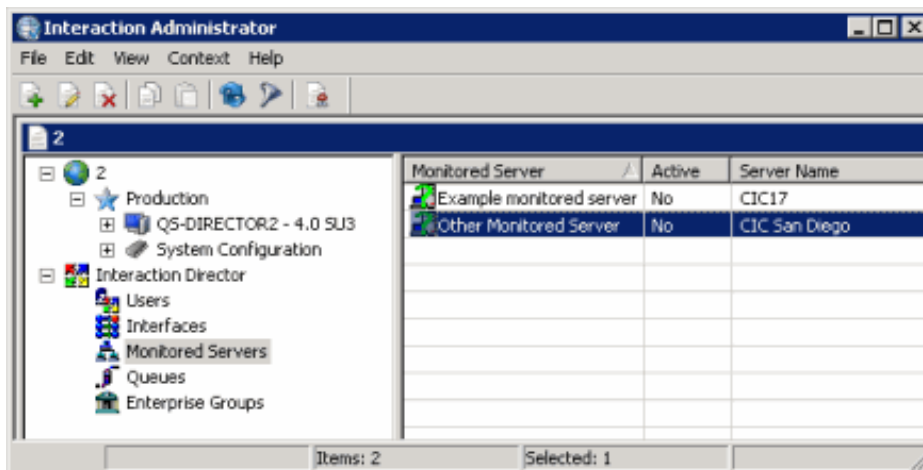
- b. In the **Routing Cost** box, type or select a routing cost and then click **OK**.
9. To delete a routing cost, on the **Routing Cost** tab, click the server and then click **Delete**. The system doesn't ask you to confirm this operation so use caution when deleting a cost.
10. To rearrange the routing order, click a row and then click **Up** or **Down**.
11. To modify the next Monitored Server in the list view, do the following:
 - a. Select **Confirm auto-save**.
 - b. Click **>>**. The next queue object in the list appears.
12. When finished modifying Monitored Servers, click **OK**.

Delete a Monitored Server

The **Monitored Servers** list view in Interaction Administrator allows you to delete a Monitored Server.

To delete a Monitored Server

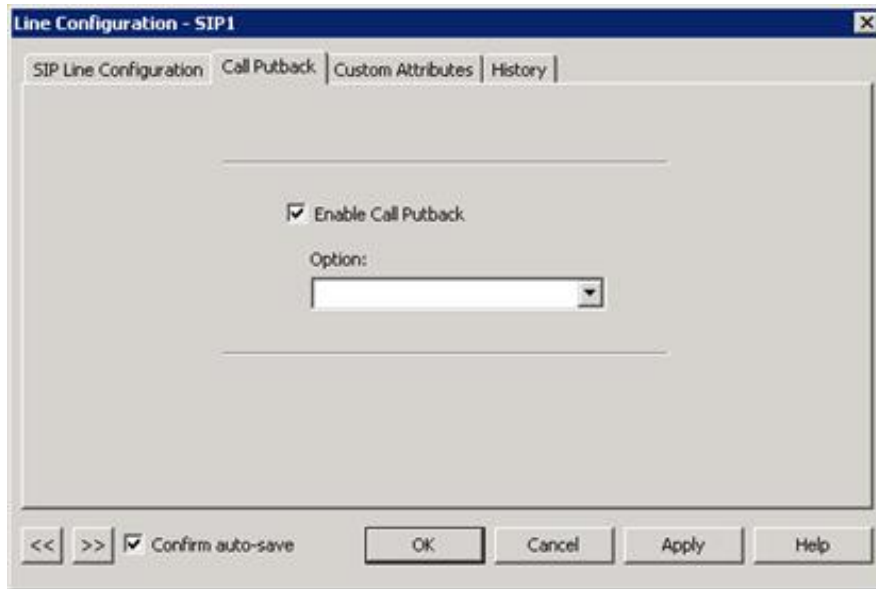
1. In the tree view, click the **Monitored Servers** container. The Monitored Servers display in the **Monitored Servers** list view.



2. In the list view, right-click the interface and then click **Delete**.
3. In the confirmation dialog box, click **Yes**.

Configure SIP Lines to Support Release Link Transfer

Director transfers calls using Release Link Transfer (RLT) whenever possible. RLT is sometimes called Release-link trunking. RLT is a form of traditional PSTN signaling that starts call transfer over a trunk. In CIC 2.3.1 and later releases, the Telephony Services subsystem can perform RLT on SIP calls. When using SIP to call between CIC servers, Director tells Telephony Services to perform a Release Link Transfer. If RLT is possible and it succeeds, the caller and the agent connect while dropping the resources that the audio path required on the CIC server where the call enqueued originally.



To allow RLT (also called Putback Transfer), enable "Putback Transfer" on the SIP line in Interaction Administrator (using the Monitored Server, Lines container). This action allows removal of the transferred call from the system, forcing both the SIP call control and the RTP out of the CIC server. With Putback Transfer activated, a REFER message sends to the gateway and an INVITE message sends to the SIP-enabled destination. If the gateway doesn't support REFER messages, the call passes through the original CIC server and consumes its IP resources.

Multi-server Email Routing Using Director

Director queues and transfers email messages to agents on remote servers as a result of Director scoring and under Director's control. The handling and tracking of email messages that Director routes matches what is available for calls (as appropriate). Director can route email messages to any email message platform that CIC supports. For more information about supported email message platforms, see the *PureConnect Installation and Configuration Guide* at https://help.genesys.com/cic/mergedprojects/wh_iandc/desktop/ic_installation_and_configuration_guide.htm.

Note:

Email message routing requires each monitored server to have at least one monitored mailbox. Each workgroup that allows email messages to route to it needs a monitored mailbox—a different one for each.

Each site needs a unique email address. For example, for Site1 and Site2, Site1 has the address "Site1@domain.com" while Site2 has the address "Site2@domain.com."

Director's email message routing functionality is similar to call routing. For example, an email message arrives on server A. If Director determines that an agent on server B can receive it, Director routes the message to the agent on server B and ensures that the agent picks up the message. If the agent doesn't pick up the message, Director reassigns it somewhere else until an agent picks it up. If no agents are available, Director holds the email message until an external source acts on it (for example, a customized handler or person who picks it up or disconnects it).

Some characteristics of email message routing are:

- Email messages require 100% use of an agent.
- The original email message remains intact on the originating CIC server (on the server where it arrived first) until Director deletes it.
- Director examines and changes the contents of an email message at two points in the process: at creation and when CIC receives it, but before any user sees it or before generating reporting data.
- Multiple CIC queues cannot monitor the same mailbox.
- Director does not check to see if a queue monitors more than one mailbox. It is the customer's responsibility to ensure that a queue monitors one mailbox.
- Director preserves custom attributes attached to an email object when the email message transfers to another server.
- Email messages take longer to route remotely than calls because of the Exchange polling interval set in the registry. Director doesn't send email message to a remote server unless an agent is available to receive the message. For email messages with long delays, if the agent is no longer available when the email message arrives, Director reroutes the email message the same as it does calls. Since changes can occur while routing is in progress, Director handles any case where the item does not get to its intended destination.

Specific Target Routing

You can configure Director to route calls or email messages to a single preferred agent. For example, a customer can use IVR to ask for a support ticket number and then look up the agent to route to. If this agent is not available, the system routes to another member of the group.

Set one or more pairs of the following attributes on the interaction before you transfer it to the Director-enabled queue:

- Name of the queue configured in Director (which uniquely identifies a queue and server pair), not just the name on the intended destination CIC server.
- Server name configured in Director.
- Wait times are in seconds and all times start at the beginning of the first wait, so that each time is longer than the one before it in terms of specificity.

To work properly, the server time is longer than the queue time, which is longer than the agent time. Once specified, these values cannot update while waiting in a particular queue but, if the interaction transfers to another queue while waiting, whatever values are in these attributes (existing or new) take effect in the new queue.

- "Dir_SpecificAgentName" and "Dir_SpecificAgentWait"
- "Dir_SpecificQueueName" and "Dir_SpecificQueueWait"
- "Dir_SpecificServerName" and "Dir_SpecificServerWait"

For an interaction, specify (using a handler) an agent, queue, server, and a timeout for each. Director attempts to route to the most specific item. It waits for that agent to become available, disregarding any other matches for the time period specified. Then, Director holds the interaction for any agent in the specified queue subject to other scoring criteria. When the time expires, Director holds the interaction for any agent on the specified server.

Queues Container

The **Queues** container in Interaction Administrator allows you to manage queue objects. Queue objects represent a Monitored Server, queue, and line group within a site. Director collects statistics for queue objects so that its handlers can make routing decisions. For more information, see the *Interaction Administrator Help* at https://help.genesys.com/cic/mergedProjects/wh_ia/desktop/interaction_administrator_help.htm.

Related topics:

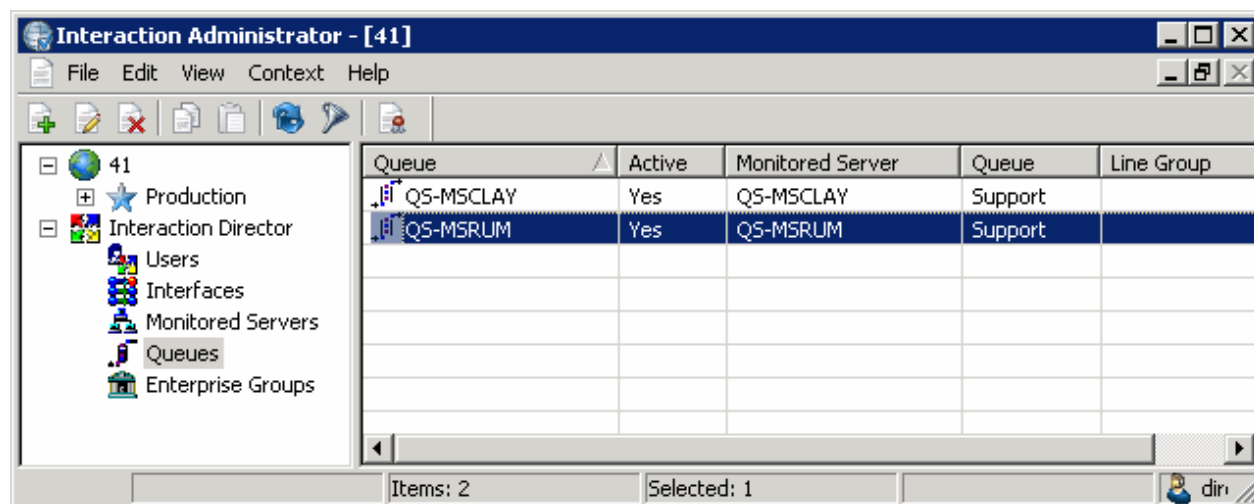
- [View Interaction Director Queues](#)
- [View Queue Statistics](#)
- [View Queue Users](#)
- [Add a Queue Object](#)
- [Modify a Queue Object](#)
- [Delete a Queue Object](#)
- [Create Multiple Queue Objects](#)
- [Statistic Codes](#)

View Interaction Director Queues

The **Users** list view in Interaction Administrator allows you to view remote queues to which Interaction Director can route interactions.

To view Interaction Director queues

1. In the tree view, click the **Queues** container. The queues display in the **Queues** list view.



Status icon: Represents the status of the queue. Director polls the links every two minutes and updates this status accordingly.

Icon	Description
	Link to the site is operational. Director can route calls to this Monitored Server.
	Link to the site is not operational. Director cannot route calls to this Monitored Server.
	Link to the site is unknown.

Queue: Name of the Queue object as defined in Director.

Active: Indicates whether the Queue is ready to receive route requests. Calls route to active queues only.

Monitored Server: Name of the CIC server, as defined using the [Monitored Servers Container](#).

Queue: Name of the remote Queue, as defined on the Monitored Server.

Line Group: Name of the line group associated to the remote queue.

2. Right-click a queue and then do the following:

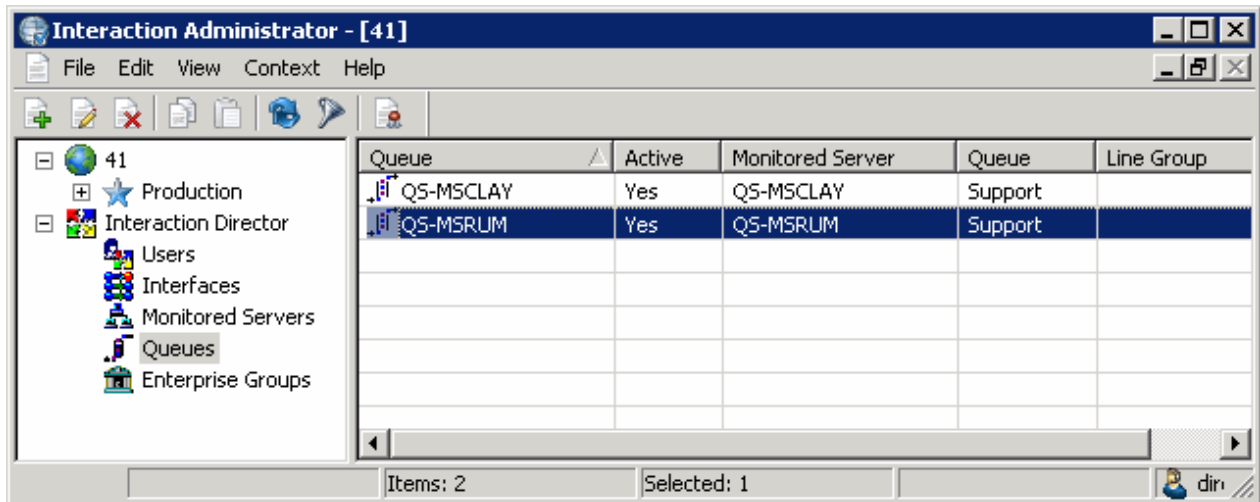
- To activate or deactivate a queue, click **Set Active** and then click **Yes** or **No**.
- To monitor queue statistics, click **Display Current Statistics**. The **Queue Statistics** dialog box appears. For more information, see [View Queue Statistics](#).
- To monitor agent statistics, click **Display Current Users**. The **User Status** dialog box appears. For more information, see [View Queue Users](#).
- To create multiple queues for one site, click **Create Multiple Queues**. The **Create Multiple Queues** wizard appears. For more information, see [Create Multiple Queue Objects](#).

View Queue Statistics

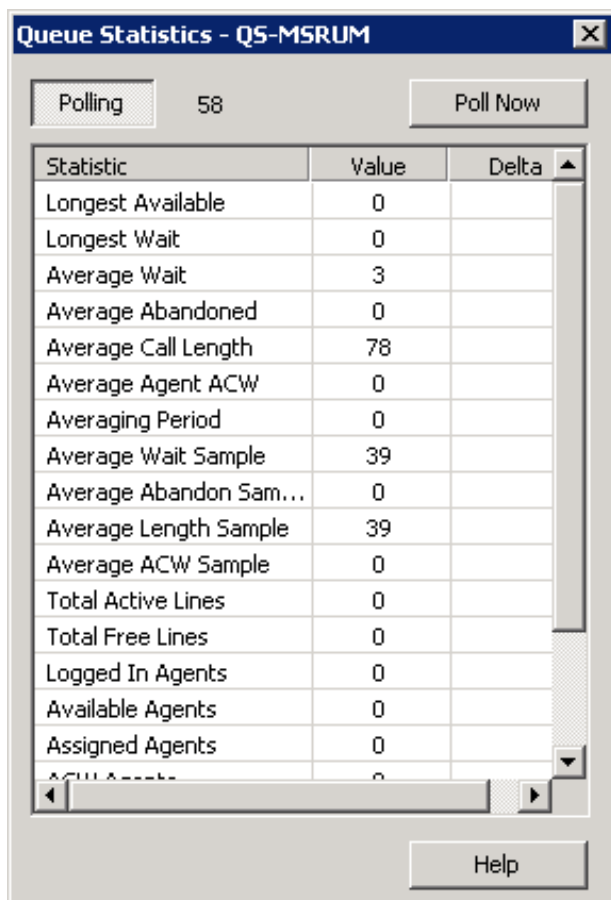
The **Queue Statistics** dialog box in Interaction Administrator allows you to view point and period statistics for any Queue object in the **Queues** container.

To view queue statistics

1. In the tree view, click the **Queues** container. The queues display in the **Queues** list view.



2. Right-click the queue and then click **Display Current Statistics**. The **Queue Statistics** dialog box appears.



Polling: Polling switch. If recessed, statistics update once each minute. If raised, polling doesn't occur.

[Polling Number]: Number of seconds until the next poll.

Statistic: Name of the statistic. For more information, see [Statistic Codes](#).

Value: Current value of the statistic.

Delta: Difference between a statistic's current value and its last polled value. Delta values show the change between the

current set of statistics and the last set of statistics. For example, if the number of Available Agents changed from 24 to 22, the delta value is -2.

3. Do one of the following:

- To update statistics once each minute, ensure that **Polling** is recessed (as in the example).
- To disable polling, ensure that **Polling** is raised.

4. To update queue statistics immediately, click **Poll Now**. A progress meter in the lower left corner of the dialog displays the status of the polling operation.

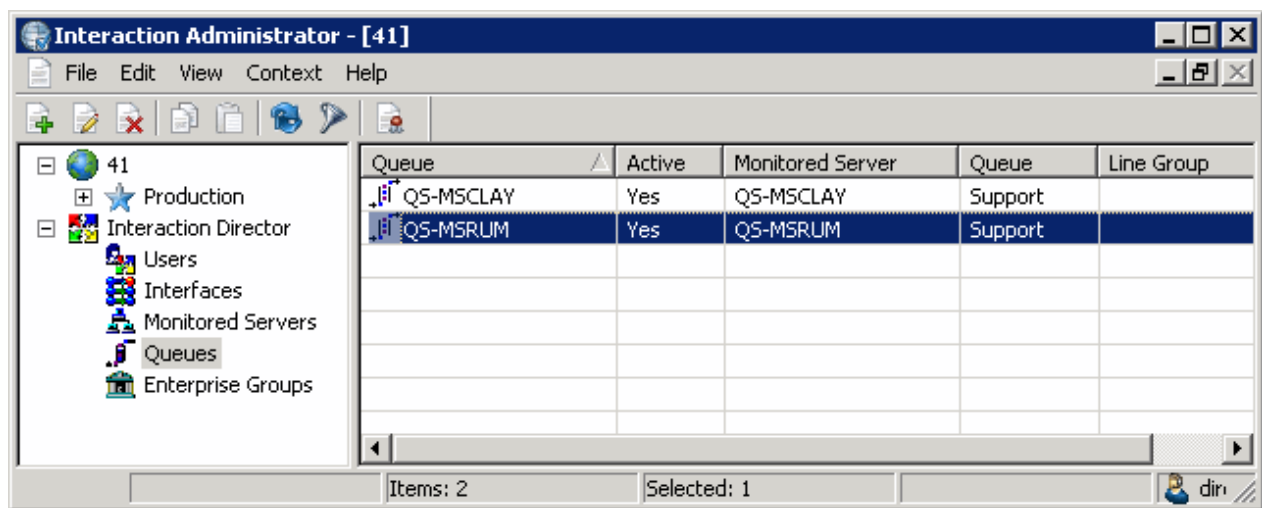
5. Click the X to close the dialog box.

View Queue Users

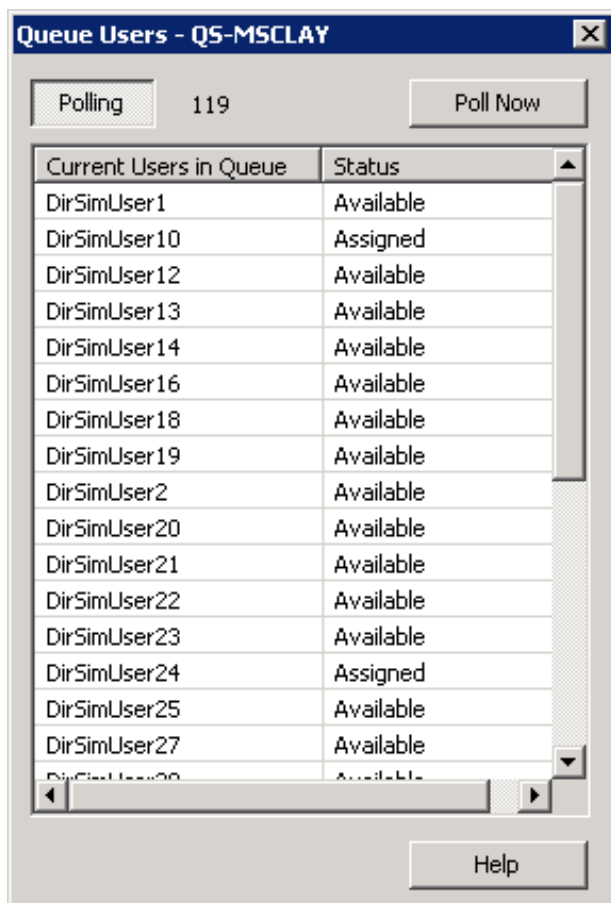
The **Queue Users** dialog box in Interaction Administrator allows you to view the status of agents in a Queue.

To view queue users

1. In the tree view, click the **Queues** container. The queues display in the **Queues** list view.



2. Right-click the queue and then click **Display Current Users**. The **Queue Users** dialog box appears.



Polling: Polling switch. If recessed, the list updates once each minute. If raised, polling doesn't occur.

[Polling Number]: Number of seconds until the next poll.

Current Users in Queue: Name of the user associated to the selected site queue.

Status: Client status of the user (for example, available or at lunch).

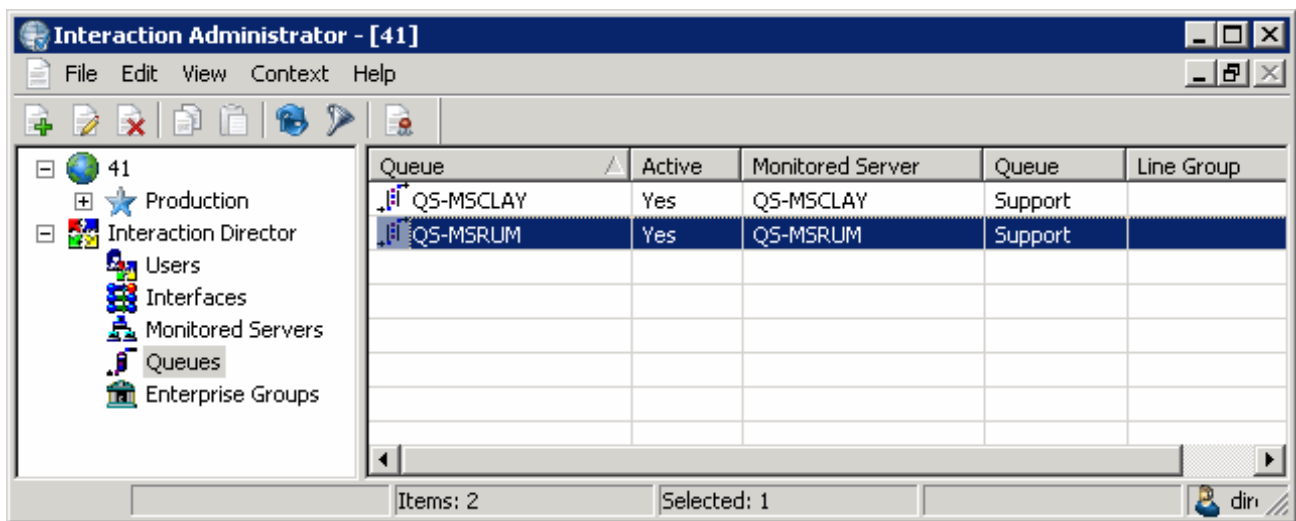
3. Do one of the following:
 - To update the list once each minute, ensure that **Polling** is recessed (as in the example).
 - To disable polling, ensure that **Polling** is raised.
4. To update the list immediately, click **Poll Now**. A progress meter in the lower left corner of the dialog displays the status of the polling operation.
5. Click the X to close the dialog box.

Add a Queue Object

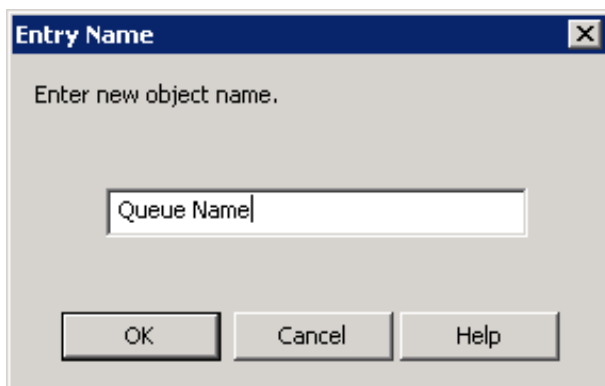
The **Queues** list view in Interaction Administrator allows you to add a queue object. To create multiple queue objects, see [Create Multiple Queue Objects](#).

To add a queue object

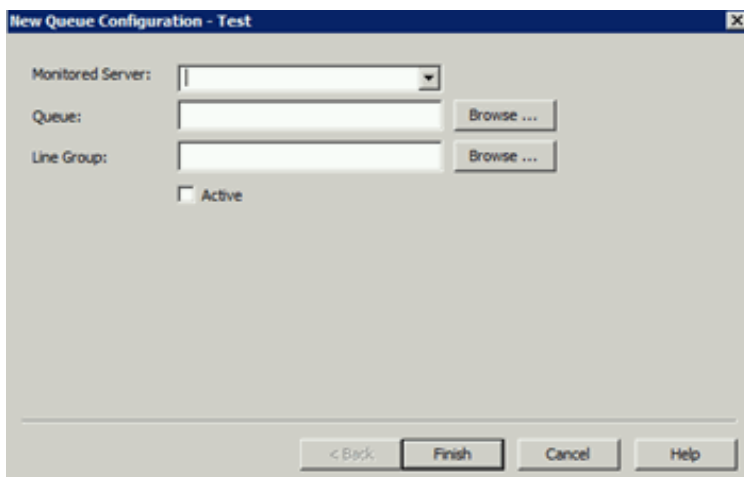
1. In the tree view, click the **Queues** container. The queues display in the **Queues** list view.



- Right-click in the list view and then click **New**. The **Entry Name** dialog box appears.



- In the box, type a descriptive name for the queue object (it's good practice to include the server name) and then click **OK**. The **Queue Configuration** dialog box appears.



Monitored Server: Name of the Monitored Server to assign to the queue. If the server isn't in the list, use the **Monitored Servers** container to add it.

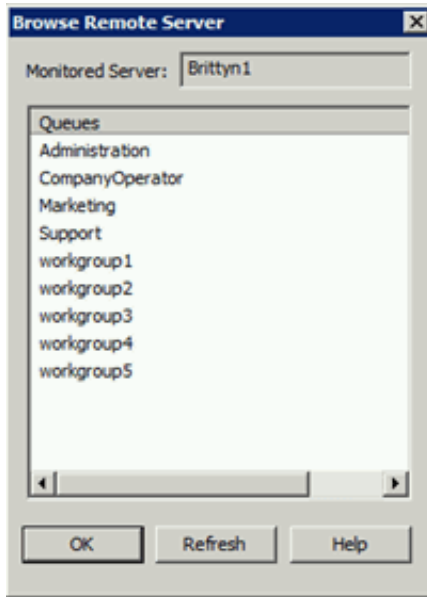
Queue: Site queue on the remote CIC server that Director can use for routing and monitoring purposes. If you select the **Active** check box, you must specify a queue. If you clear the **Active** check box, you can leave this box blank.

Line Group: Line group to assign to the queue.

Active: If selected, the queue can receive routing requests. Specify a queue in the **Queue** box. If cleared, the queue cannot receive routing requests. Leave the **Queue** box blank.

- In the **Monitored Server** list box, click the server to assign.
- Do the following:

- a. Next to the **Queue** box, click **Browse...** The **Browse Remote Server** dialog box appears.



- b. Click the queue to assign and then click **OK**.

6. Do the following:

- a. Next to the **Line Group** box, click **Browse...** The **Browse Remote Server** dialog box appears.



- b. Click the line group to assign and then click **OK**.

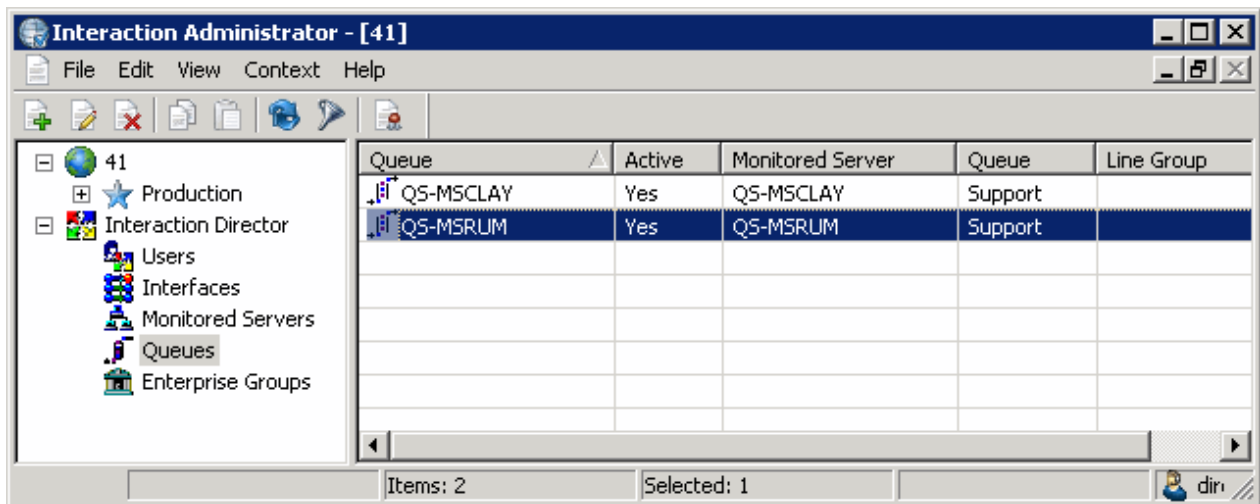
7. Select **Active** and then click **Finish**.

Modify a Queue Object

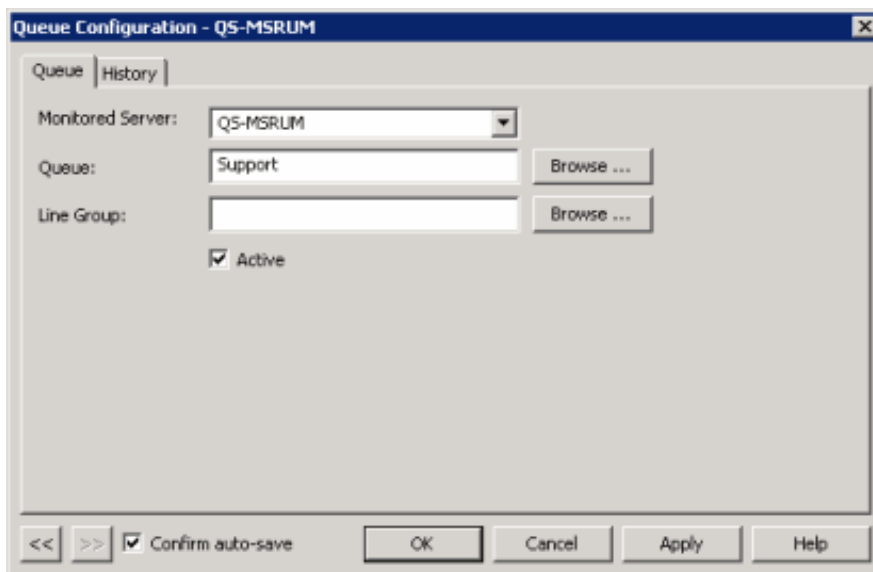
The **Queues** list view in Interaction Administrator allows you to modify a queue object.

To modify a queue object

1. In the tree view, click the **Queues** container. The queues display in the **Queues** list view.



2. Right-click the queue object and then click **Properties**. The **Queue Configuration** dialog box appears.



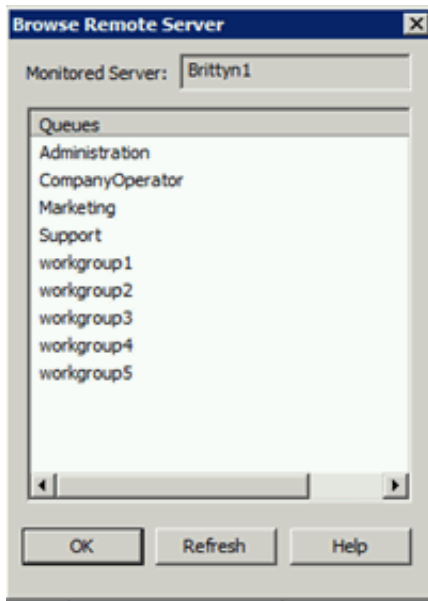
Monitored Server: Name of the Monitored Server. If the server isn't in the list, use the **Monitored Servers** container to add it.

Queue: Site queue on the remote CIC server that Director can use for routing and monitoring purposes. If you select the **Active** check box, you must specify a queue. If you clear the **Active** check box, you can leave this box blank.

Line Group: Line group to associate to the queue.

Active: If selected, the queue can receive routing requests. Specify a queue in the **Queue** box. If cleared, the queue cannot receive routing requests. Leave the **Queue** box blank.

3. To modify the monitored server assignment, in the **Monitored Server** list box, click the server to assign.
4. To modify the queue assignment, do the following:
 - a. Next to the **Queue** box, click **Browse...** The **Browse Remote Server** dialog box appears.



- b. Click the queue to assign and then click **OK**.
5. To modify the line group assignment, do the following:
 - a. Next to the **Line Group** box, click **Browse...** The **Browse Remote Server** dialog box appears.



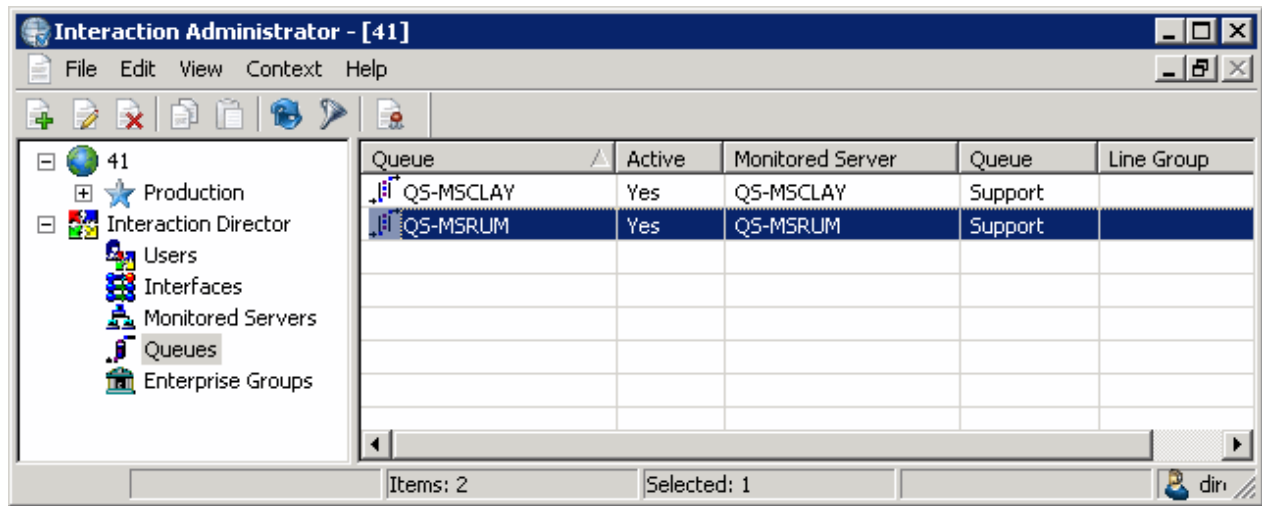
- b. Click the line group to assign and then click **OK**.
6. Select or clear the **Active** check box and then click **Apply**.
7. To modify the next queue object in the list view, do the following:
 - a. Select **Confirm auto-save**.
 - b. Click **>>**. The next queue object in the list appears.
8. When finished modifying queue objects, click **OK**.

Delete a Queue Object

The **Queues** list view in Interaction Administrator allows you to delete a queue object.

To delete a queue object

1. In the tree view, click the **Queues** container. The queues display in the **Queues** list view.



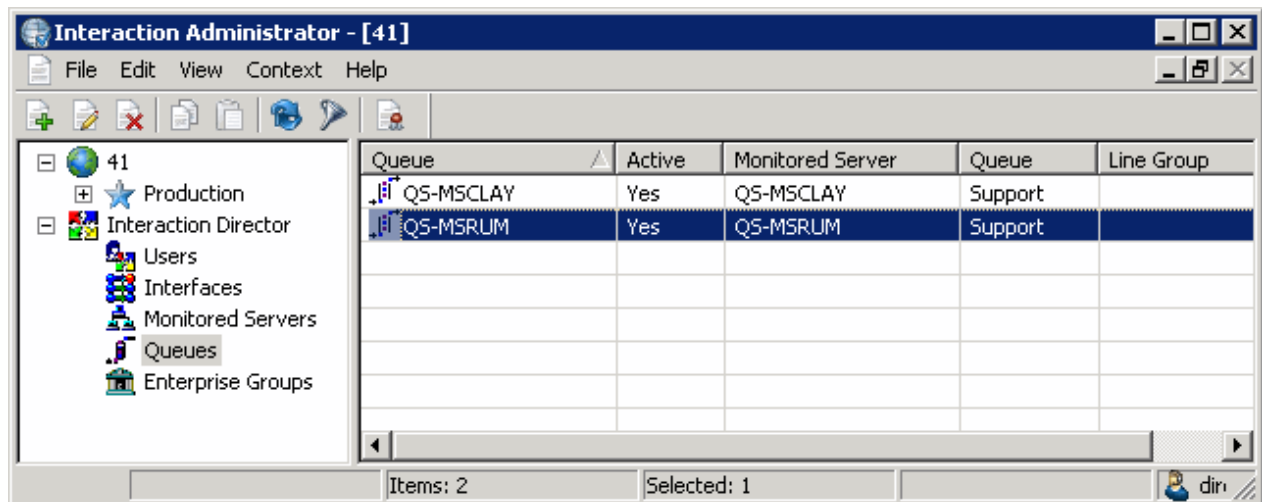
2. Right-click the user and then click **Delete**.
3. In the confirmation dialog box, click **Yes**.

Create Multiple Queue Objects

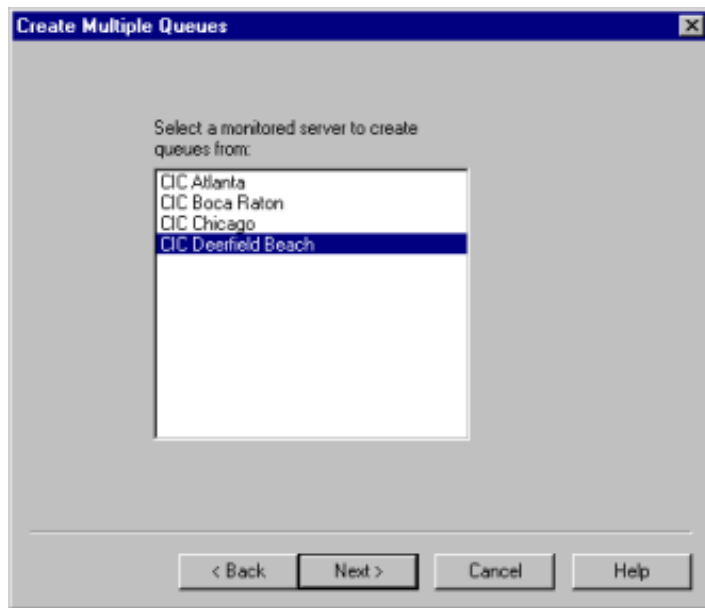
The **Create Multiple Queues** wizard in Interaction Administrator allows you to create multiple queue objects for a single monitored site.

To create multiple queue objects

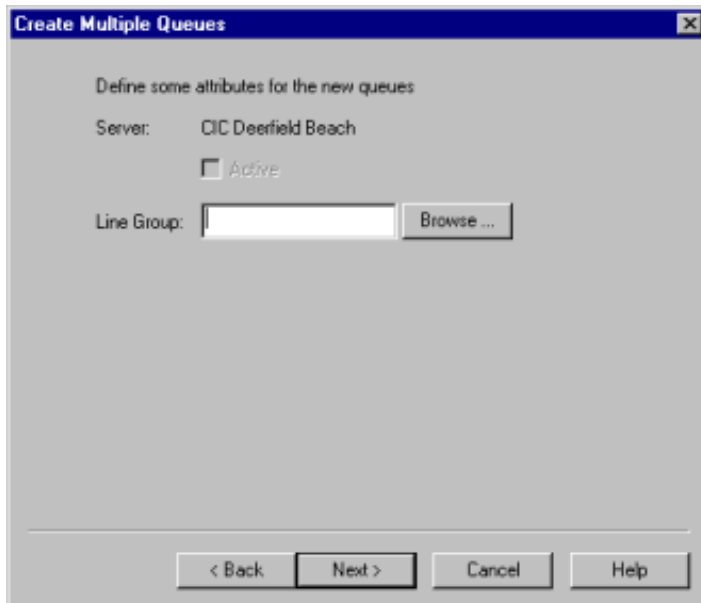
1. In the tree view, click the **Queues** container. The queues display in the **Queues** list view.



2. Right-click the queue object and then click **Create Multiple Queues**. The **Create Multiple Queues** wizard appears.



3. Click a Monitored Server from which to create queues and then click **Next**. The **Line Group** page appears.



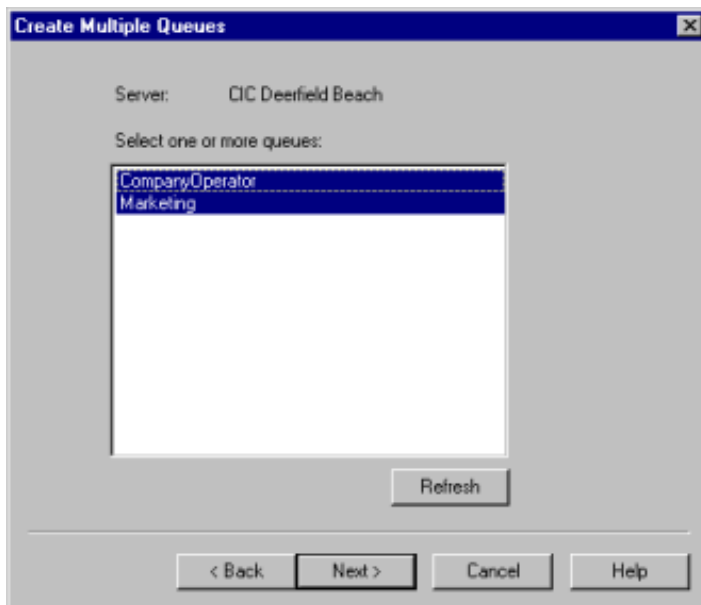
4. Click **Browse**. The **Browse Remote Server** dialog appears.



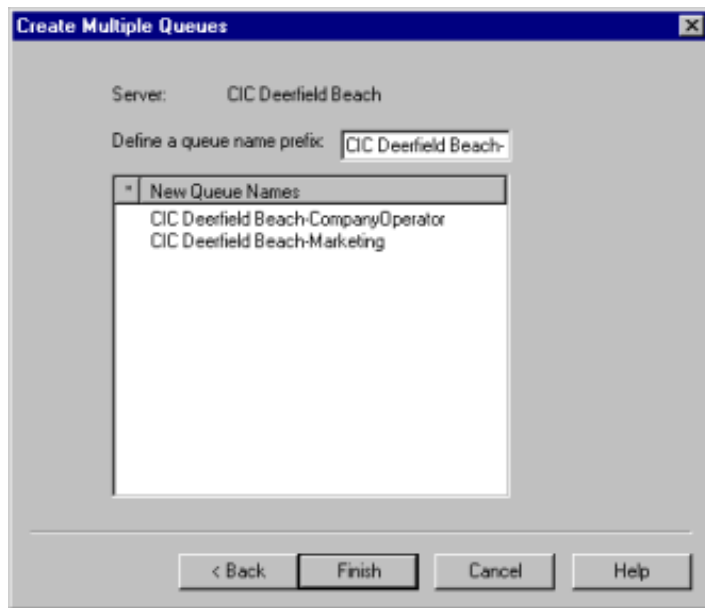
Monitored Server: Name of the Monitored Server.

Line Groups: Line groups defined on the remote server.

5. Click a line group and then click **OK**.
6. Click **Next**. The **Queues** page appears.



7. Do one of the following:
 - To select a single queue, in the list box, click the queue.
 - To select multiple queues, click the queue, press and hold the **Ctrl** key, and then click other queues.
8. To update the list of sites queues, click **Refresh**.
9. Click **Next**. The **Queue Name Prefix** page appears.



10. To define a queue name prefix to pre-pend to the site queue name to form a unique queue object name, in the **Define a queue name prefix** box, type a new prefix or accept the default value. The default prefix is the name of the Monitored Server that you specified earlier.
11. Click **Finish**.

Statistic Codes

The following table describes the queue statistic codes.

Statistic	Description
Longest Available	Longest amount of time an agent waited for a call.
Longest Wait	Longest amount of time a call waited for an available agent to pick up.
Average Wait	Average amount of time a call waited for an available agent to pick up.
Average Abandoned	Average number of abandoned calls for this queue. Abandoned calls entered the queue, but disconnected remotely before an agent could answer them.
Average Call Length	Average length of all calls that this queue processed.
Average Agent ACW	Average time that agents spend in "After Call Work" status.
Averaging Period	Period for calculating averages. Other averaging statistics are based on the amount of time shown here.
Average Wait Sample	Number of calls in the wait sample used to calculate "Average Wait." Basically, the number of calls waiting during the "Averaging Period."
Average Abandon Sample	Number of calls in the "Abandon Sample" used to calculate "Average Abandon." Basically, the number of calls abandoned during the "Averaging Period."
Average Length Sample	Length of calls in the length sample used to calculate "Average Call Length." Basically, the length of calls during the "Averaging Period."
Average ACW Sample	Number of calls in the After Call Work (ACW) sample used to calculate "Average Agent ACW. Basically, the length of calls during the "Averaging Period."
Total Active Lines	Number of lines in use currently.
Total Free Lines	Number of lines not in use currently.
Logged in Agents	Number of agents logged on to the workgroup associated to this queue.
Available Agents	Number of agents available to receive calls.
Assigned Agents	Number of agents processing calls.
ACW Agents	Number of agents in an "After Call Work" status.
Calls Waiting	Number of calls waiting for an available agent.
Calls Connected	Number of calls connected to agents currently.

Enterprise Groups Container

The **Enterprise Groups** container in Interaction Administrator allows you to manage enterprise groups, queue assignments, post-call weights, and skill requirements. An Enterprise Group is the target destination of a routed call. It is a collection of CIC queues at the various sites where calls can route. For example, an enterprise group named "Corporate Sales EG" can include a sales queue on server CIC_Chicago and a sales queue on server CIC_Atlanta. Director associates routing rules that determine where to send calls in an enterprise group.

In a configuration with two sites, enterprise groups can have only two queues. The queues are the queue at the local site that receives the external call and is making the routing requests, and the queue at the remote site to which a call can route. In a configuration with more than two sites, you can have multiple queues in the enterprise group. You can even have multiple queues from a single site in the enterprise group.

You cannot route to a queue on the originating site that is different from the one that the external call is waiting in when the site makes the route request. To have correct ACD statistics for the external call when viewed solely from the viewpoint of the original queue, the call must remain in the original queue no matter what site answers it.

For more information, see the *Interaction Administrator Help* at https://help.genesys.com/cic/mergedProjects/wh_ia/desktop/interaction_administrator_help.htm.

Related topics:

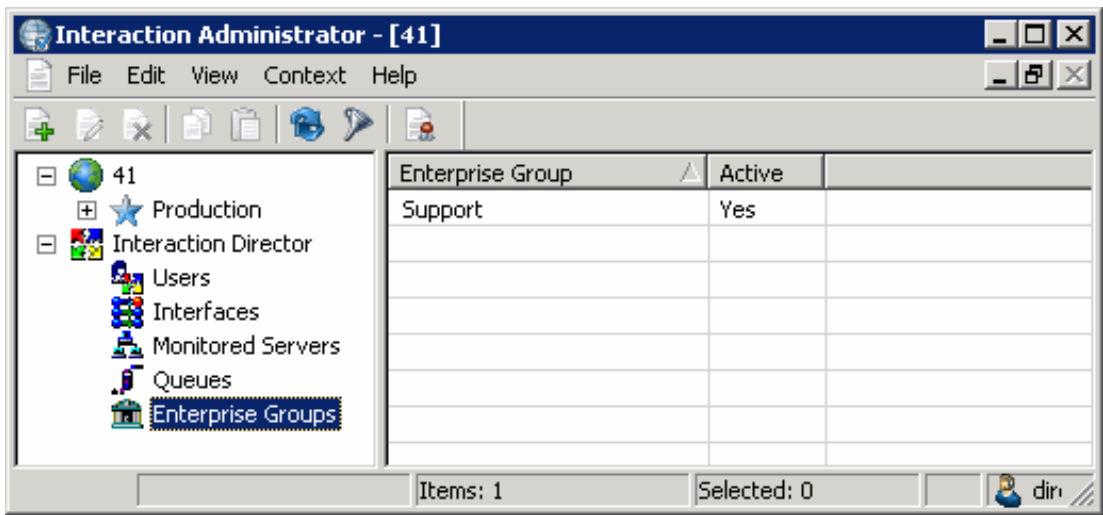
- [View Interaction Director Enterprise Groups](#)
- [Add an Enterprise Group](#)
- [Modify an Enterprise Group](#)
- [Delete an Enterprise Group](#)
- [Monitored Values](#)
- [Pre-call Routing](#)
- [Post-call Routing](#)
- [Enterprise Group Skills](#)

View Interaction Director Enterprise Groups

The **Enterprise Groups** list view in Interaction Administrator allows you to view Interaction Director enterprise groups.

To view Interaction Director enterprise groups

1. In the tree view, click the **Enterprise Groups** container. The enterprise groups display in the **Enterprise Groups** list view.



Enterprise Group: Name of the enterprise group.

Active: Indicates whether the Enterprise Group is active, meaning that Director evaluates it using Director's call routing algorithm.

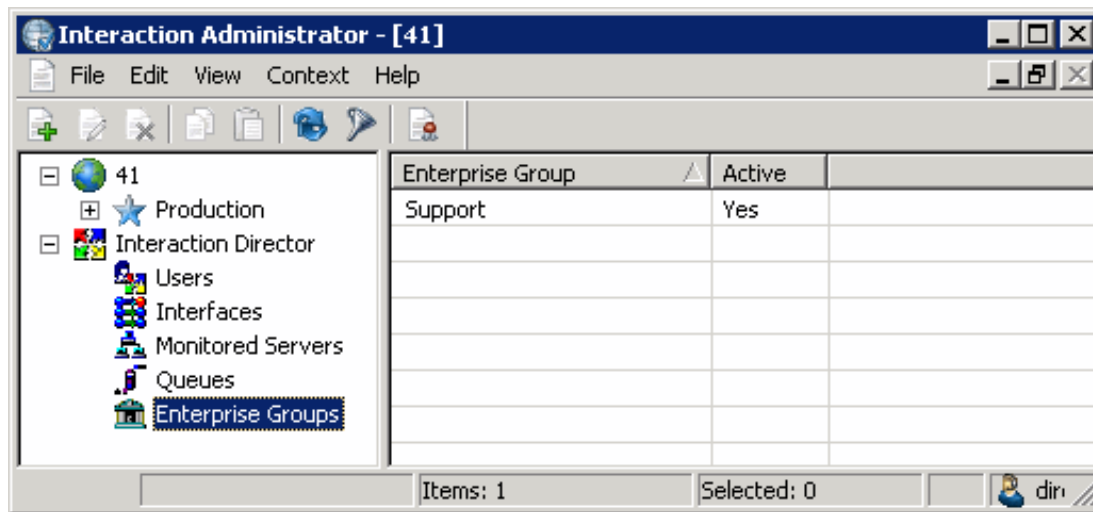
2. To activate or deactivate an enterprise group, in the list view, right-click the server, click **Active**, and then click **Yes** or **No**.

Add an Enterprise Group

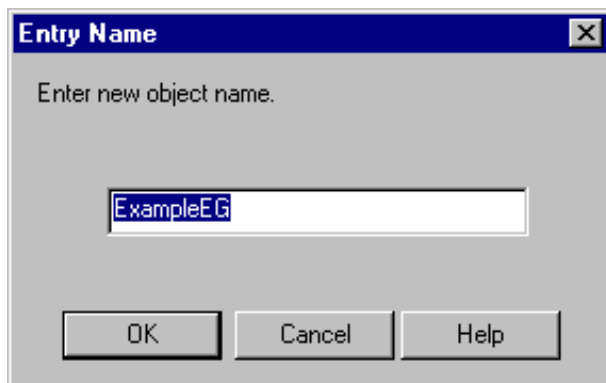
The **New Enterprise Group Configuration** wizard in Interaction Administrator allows you to create enterprise groups.

To add an enterprise group

1. In the tree view, click the **Enterprise Groups** container. The enterprise groups display in the **Enterprise Groups** list view.



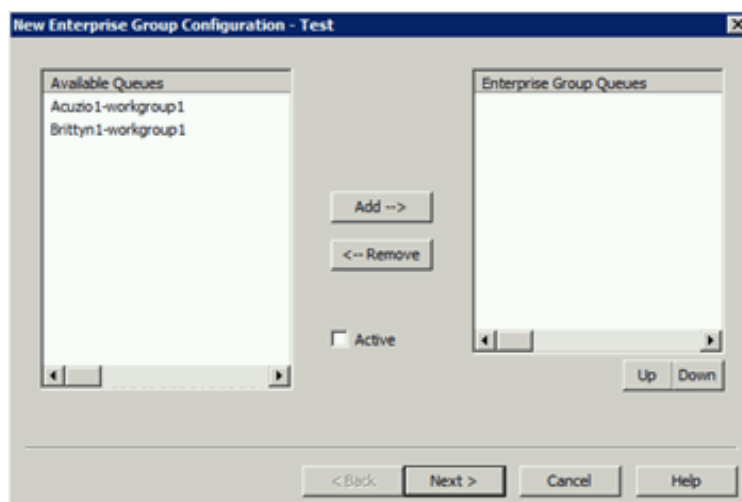
2. Right-click in the list view and then click **New**. The **Entry Name** dialog box appears.



3. In the box, type a descriptive name for the enterprise group and then click **OK**. The **New Enterprise Group Configuration** wizard appears.

Note:

Genesys recommends that you establish a naming convention for enterprise groups. For example, "Corporate Sales EG."

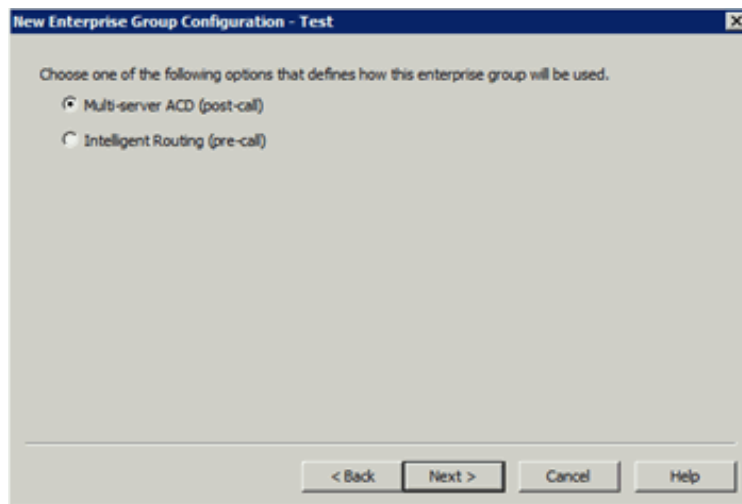


Available Queues: Queues that you can associate to this enterprise group.

Enterprise Group Queues: Queues associated to this enterprise group.

Active: If selected, the enterprise group is active. If cleared, the enterprise group is inactive and Interaction Director ignores the group.

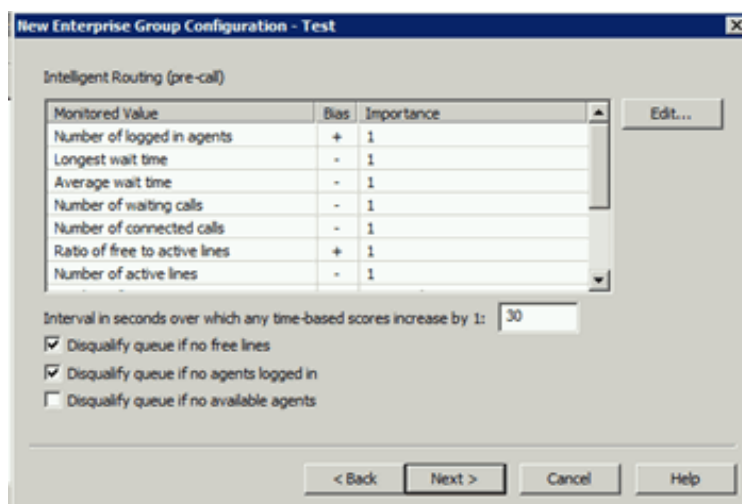
4. Do the following:
 - a. To add a queue to the group, click the queue in the **Available Queues** list box and then click **Add-->**. The queue moves to the **Enterprise Group Queues** list box.
 - b. To remove a queue from the group, click the queue in the **Enterprise Group Queues** list box and then click **--Remove**. The queue moves to the **Available Queues** list box.
 - c. Select the **Active** check box.
 - d. To change the order of an enterprise group, in the **Enterprise Group Queues** list box, click the group and then click **Up** or **Down**. Director evaluates groups in the order they appear in the list box.
5. Click **Next**. The next page of the wizard appears.



Multi-server ACD (post-call): If selected, Director uses post-call routing for the enterprise group. For more information, see [Post-call Routing](#).

Intelligent Routing (pre-call): If selected, Director uses pre-call routing for the enterprise group. For more information, see [Pre-call Routing](#).

6. Select an option and then click **Next**. The next page of the wizard appears.



Monitored Value: Values that Director monitors to make routing decisions. Unavailable items display in gray to indicate that you configured Director to ignore the value when scoring. To change availability, double-click the value and then, in the **Routing Criterion Definition** dialog box, select **Enable this criterion for scoring**. For more information about monitored values, see [Monitored Values](#).

Bias: Monitored value's positive or negative bias. A plus indicates that higher values are more desirable from a scoring point of view. A minus indicates that lower values are more desirable.

Importance: Number between 1 and 100 that weights the criteria's influence on the routing calculation. Assign more important criteria a higher weight. Importance works with the bias setting to indicate whether a higher number is more desirable or less desirable. For example, whether a higher number means that the agent can receive the call or a higher number means that the agent cannot receive the call. Higher weight makes a specific factor affect the score more in whatever direction the bias specifies. A value of "Not used" indicates that Director doesn't use the value when Director scores this Enterprise Group.

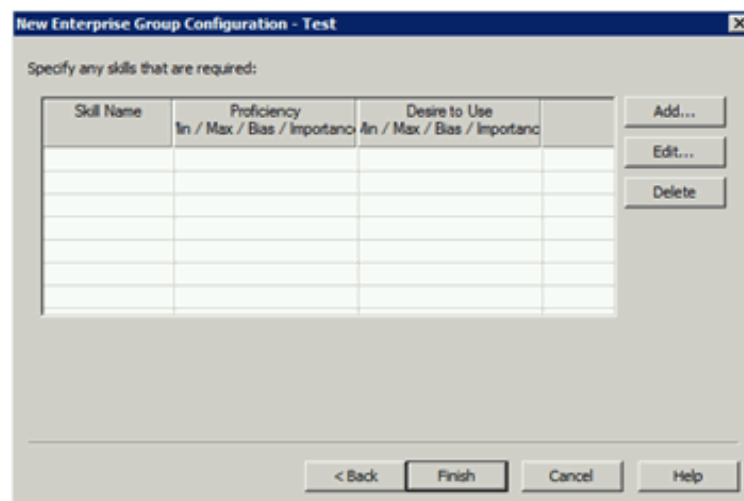
Interval in seconds over which any time-based scores increase by 1: Number of seconds (from 1 to 600) over which any time-based scores increase by 1. The default is 30 seconds.

Disqualify queue, if no free lines: If selected, Director does not evaluate enterprise group queues when no lines are available.

Disqualify queue, if no agents logged on: If selected, Director does not evaluate enterprise group queues when no agents are logged on. This option is available for pre-call only.

Disqualify queue, if no available agents: If selected, Director does not evaluate enterprise group queues when no agents are available. This option is available for pre-call only.

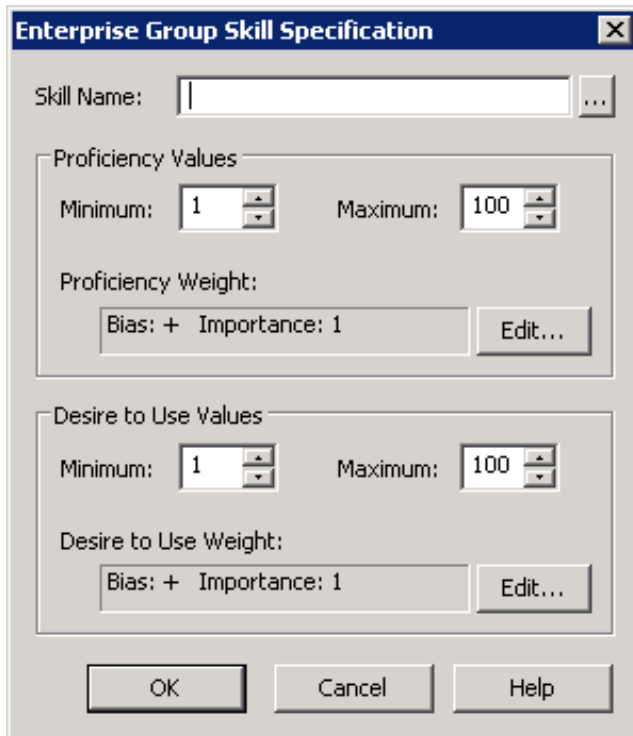
7. Complete the information and then click **Next**. The next page of the wizard appears.



The dialog box titled "New Enterprise Group Configuration - Test" contains a section labeled "Specify any skills that are required:". Below this is a table with four columns: "Skill Name", "Proficiency", "Desire to Use", and an empty column. The "Proficiency" and "Desire to Use" columns have sub-headers "In / Max / Bias / Importance". To the right of the table are three buttons: "Add...", "Edit...", and "Delete". At the bottom of the dialog are four buttons: "< Back", "Finish", "Cancel", and "Help".

Skill Name	Proficiency In / Max / Bias / Importance	Desire to Use In / Max / Bias / Importance	

8. Click **Add**. The **Enterprise Group Skill Specification** dialog box appears.



The dialog box is titled "Enterprise Group Skill Specification". It contains the following fields and controls:

- Skill Name:** A text input field with a browse button (three dots) to its right.
- Proficiency Values section:**
 - Minimum:** A spinner box set to 1.
 - Maximum:** A spinner box set to 100.
 - Proficiency Weight:** A text box containing "Bias: + Importance: 1" and an "Edit..." button.
- Desire to Use Values section:**
 - Minimum:** A spinner box set to 1.
 - Maximum:** A spinner box set to 100.
 - Desire to Use Weight:** A text box containing "Bias: + Importance: 1" and an "Edit..." button.
- Buttons:** "OK", "Cancel", and "Help" at the bottom.

Skill Name: Name of the skill to assign to the workgroup.

Proficiency Values section:

Minimum: Agent's minimum proficiency level for this skill, in a range from 1 to 100.

Maximum: Agent's maximum proficiency level for this skill, in a range from 1 to 100. For example, if the skill is Spanish and the minimum proficiency is 70 and the maximum is 100, Director looks for agents whose language proficiency is 70 out of a possible 100-point range.

Proficiency Weight: Indicates whether the proficiency has a negative or positive bias and the weight of the proficiency's influence on the routing calculation.

Desire to Use section:

Minimum: Agent's minimum desire to use this skill, in a range from 1 to 100.

Maximum: Agent's maximum desire to use this skill, in a range from 1 to 100.

Desire to Use Weight: Indicates whether the "desire to use" has a positive or negative bias and its weight of importance.

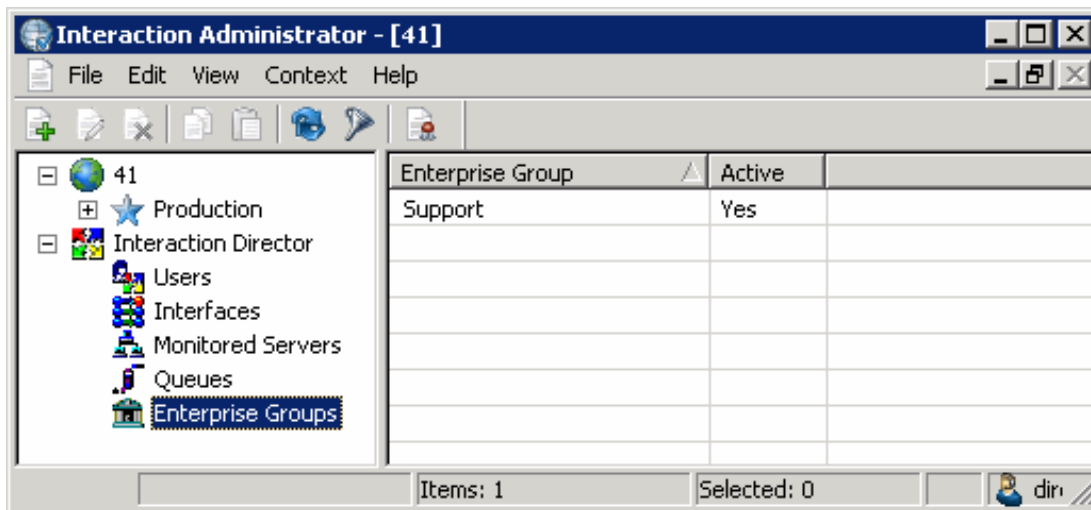
9. Complete the information and then click **OK**.
10. Define other enterprise groups as necessary and then click **Finish**.

Modify an Enterprise Group

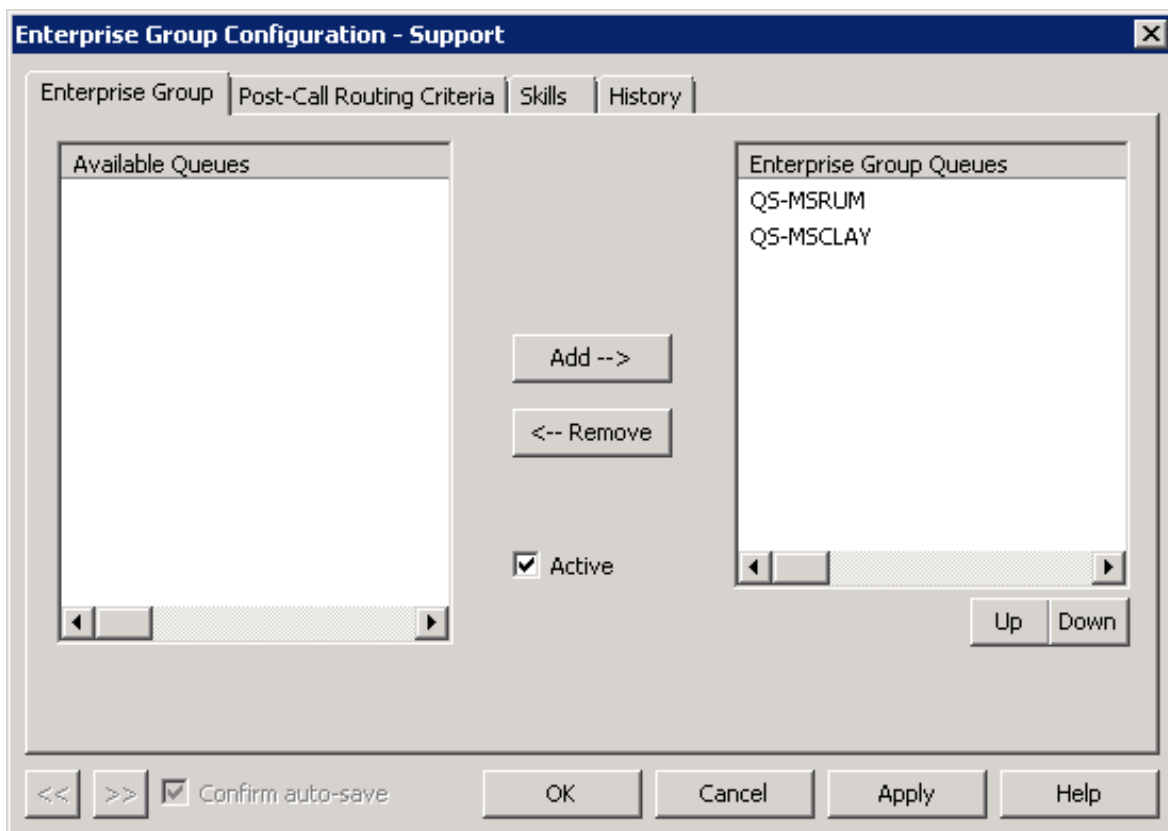
The **Enterprise Group Configuration** dialog box in Interaction Administrator allows you to modify an enterprise group.

To modify an enterprise group

1. In the tree view, click the **Enterprise Groups** container. The enterprise groups display in the **Enterprise Groups** list view.



2. Right-click the enterprise group and then click **Properties**. The **Enterprise Group Configuration** dialog box appears.



Available Queues: Queues that you can associate to this enterprise group.

Enterprise Group Queues: Queues associated to this enterprise group.

Active: If selected, the enterprise group is active. If cleared, the enterprise group is inactive and Interaction Director ignores the group.

3. Do the following as necessary:
 - a. To add a queue to the group, click the queue in the **Available Queues** list box and then click **Add-->**. The queue moves to the **Enterprise Group Queues** list box.
 - b. To remove a queue from the group, click the queue in the **Enterprise Group Queues** list box and then click **<--Remove**. The queue moves to the **Available Queues** list box.
 - c. Select or clear the **Active** check box.
 - d. To change the order of an enterprise group, in the **Enterprise Group Queues** list box, click the group and then click **Up** or **Down**. Director evaluates groups in the order they appear in the list box.
4. Click **Apply**.

5. To modify pre- or post-call routing criteria, click the **Pre-** or **Post-Call Routing Criteria** tab, depending on which type of routing you defined for the enterprise group. The following example shows the **Pre-Call Routing Criteria** tab.

Monitored Value	Bias	Importance
Number of logged in agents	+	1
Longest wait time	-	1
Average wait time	-	1
Number of waiting calls	-	1
Number of connected calls	-	1
Ratio of free to active lines	+	1
Number of active lines	-	1

Interval in seconds over which any time-based scores increase by 1: 30

☒ Disqualify queue if no free lines
☒ Disqualify queue if no agents logged in
☐ Disqualify queue if no available agents

<< >> ☒ Confirm auto-save OK Cancel Apply Help

Interval in seconds over which any time-based scores increase by 1: Number of seconds (from 1 to 600) over which any time-based scores increase by 1. The default is 30 seconds.

Disqualify queue, if no free lines: If selected, Director does not evaluate enterprise group queues when no lines are available.

Disqualify queue, if no agents logged on: If selected, Director does not evaluate enterprise group queues when no agents are logged on. This option is available for pre-call only.

Disqualify queue, if no available agents: If selected, Director does not evaluate enterprise group queues when no agents are available. This option is available for pre-call only.

6. Modify the options as necessary and then click **Apply**.
7. To modify a monitored value, click the monitored value and then click **Edit...** The **Routing Criterion Definition** dialog box appears.

Monitored Value: Interaction priority

☒ Enable this criterion for scoring

Monitored Value Bias:

☒ + Plus (higher monitored values are more desirable)
☐ - Minus (lower monitored values are more desirable)

Importance: 1 (Values are 1 through 100)

OK Cancel Help

Enable this criterion for scoring: If selected, Director's scoring algorithm evaluates the proficiency weight. If cleared, "Not used" appears in the Routing Criteria list.

+ Plus (higher monitored values are more desirable): If selected, higher scoring values are more desirable.

- Minus (lower monitored values are more desirable): If selected, lower scoring values are more desirable.

Note:

Interactions go to the agent (in post-call) or queue (in pre-call) with the highest score. A positive (+) bias tends to increase the score; a negative (-) bias decreases the score.

Importance: Numeric value between 1 and 100 that weights the criteria's influence on the routing calculation. Assign more

important criteria a higher weight. Importance works with the bias setting to indicate whether a higher number is more desirable or less desirable. For example, whether a higher number means that the agent can receive the call or a higher number means that the agent cannot receive the call. Higher weight makes a specific factor affect the score more in whatever direction the bias specifies.

8. Modify the information and then click **OK**.
9. Click the **Skills** tab.

Enterprise Group Configuration - Test

Enterprise Group | Pre-Call Routing Criteria | **Skills** | History

Specify any skills that are required:

Skill Name	Proficiency Min / Max / Bias / Importance	Desire to Use Min / Max / Bias / Importance
Test Skill	1 / 100 / + / 1	1 / 100 / + / 1

Add... Edit... Delete

<< >> ☒ Confirm auto-save OK Cancel Apply Help

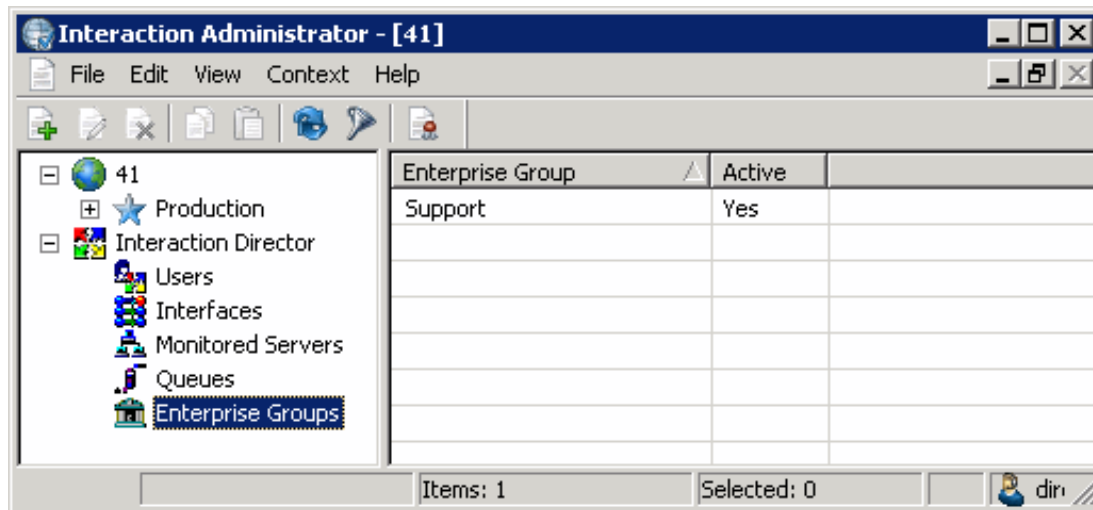
10. Do one of the following:
 - a. To add a skill, do the steps to [Add a Skill](#).
 - b. To modify a skill, do the steps to [Modify a Skill](#).
 - c. To delete a skill, do the steps to [Delete a Skill](#).
11. To modify the next enterprise group in the list view, do the following:
 - a. Select **Confirm auto-save**.
 - b. Click >>. The next enterprise group in the list appears.
12. When finished modifying enterprise groups, click **OK**.

Delete an Enterprise Group

The **Enterprise Groups** list view in Interaction Administrator allows you to delete an enterprise group.

To delete an enterprise group

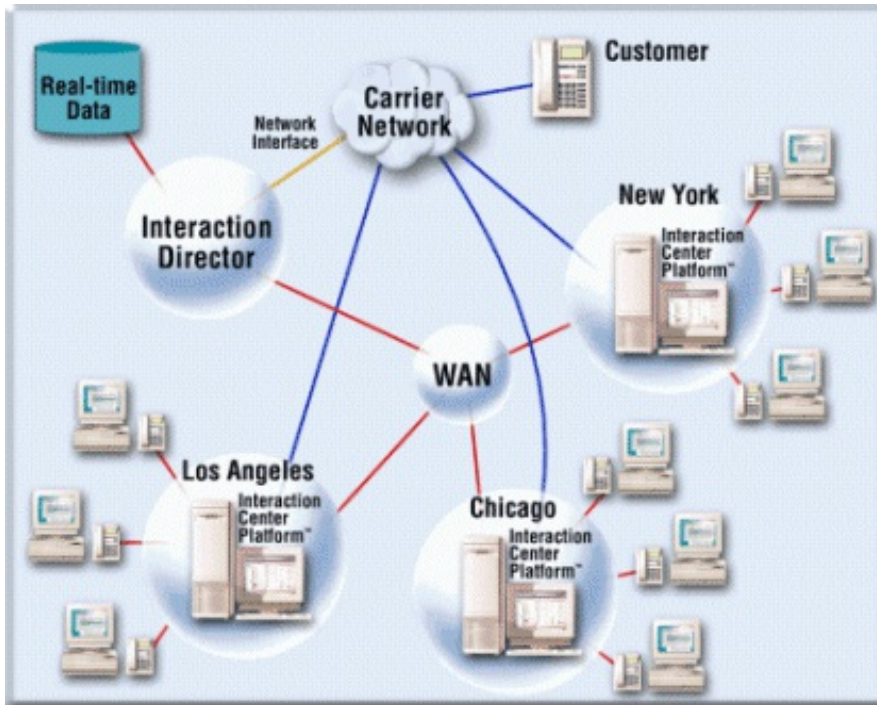
1. In the tree view, click the **Enterprise Groups** container. The enterprise groups display in the **Enterprise Groups** list view.



2. Right-click the enterprise group and then click **Delete**.
3. In the confirmation dialog box, click **Yes**.

Pre-call Routing

Pre-call routing is the process of routing a call before the call connects to a location. In pre-call mode, Interaction Director receives a call event from a SIP network interface, usually a telecommunications carrier. Interaction Director analyzes statistical data collected from managed CIC servers, then "directs" the carrier to send the call to a specific destination point.



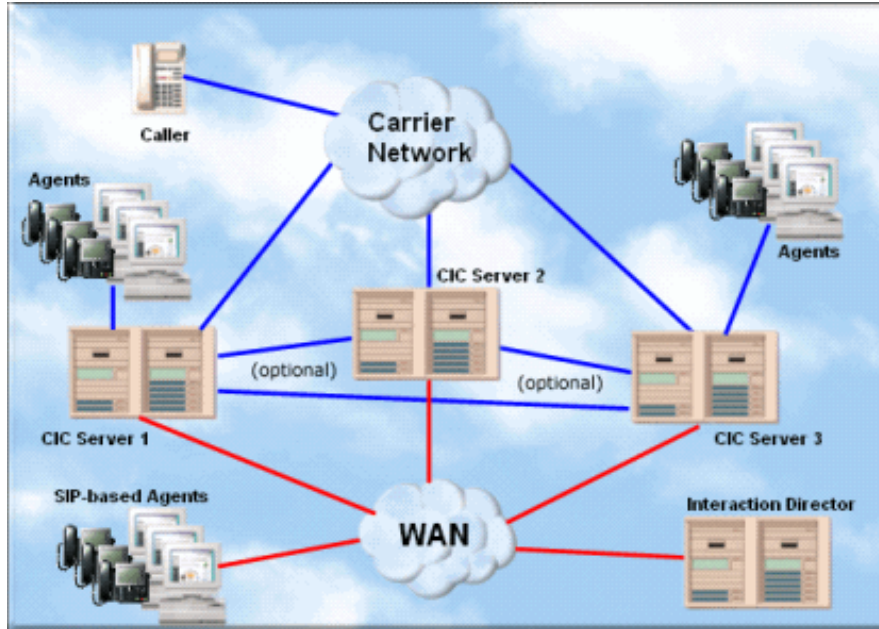
You can think of pre-call routing as "carrier-based routing" since routing decisions occur before the call connects and are based on signaling information from the carrier network.

A signaling link from a network carrier sends advance notifications of incoming calls to Director. It receives this information, views the current state of all call centers, and then sends a notification back to the PSTN indicating where to route the call. Thus, the call routes before answering it.

Pre-call routing can reduce toll charges, since Director makes intelligent routing decisions before the call connects, rather than using post-call routing to transfer the call after sending it to a call center site.

Post-call Routing

Post-call routing is the process of routing a call after it connects to a specific location. In post-call mode, Interaction Director acts as a multi-server ACD.



In this configuration, Director uses scoring to decide which CIC server and agent can best handle the call. Upon receiving this information, the starting CIC server works with Interaction Director to connect the call to that server and agent. Director verifies that the call reached the intended recipient and if not, reassigns it. In post-call routing scenarios, the CIC servers perform static routing when Interaction Director can't provide on-demand routing.

Post-call routing occurs when Director cannot redirect a call until after the call connects at a specific location. For example, a customer calls a local number in New York. The communications system at the New York contact center that answers the call uses interactive voice response (IVR) to ask questions and obtain information. Based on that information, or based on other factors such as the New York center's load level, Director transfers the call to another site.

Post-call routing occurs when a call connected to a CIC server routes to another CIC server over a tie line or other channel. Director uses post-call routing based on the scoring factors defined in the Enterprise Group configuration on the Director server.

Interaction Director supports post-call routing using SIP or circuit-based TDM tie lines. Specifically, Interaction Director supports T1/E1/PRI connections, PSTN connections, and SIP-based IP telephony as the tie lines between CIC servers. Post-call routing does not require a network interface connection with the carrier, only a Director server connected to the IP network, which is the same LAN/WAN that contains the CIC servers.

Enterprise Group Skills

The **Skills** page of the **New Enterprise Group Configuration** wizard or the **Skills** tab in the **Enterprise Group Configuration** dialog box allows you to configure skills for the enterprise group. Director evaluates skills to score and influence routing of calls to queues in an enterprise group. All interactions coming into the system using this enterprise group require the listed skills.

Related topics:

- [Add a Skill](#)
- [Modify a Skill](#)
- [Delete a Skill](#)

Add a Skill

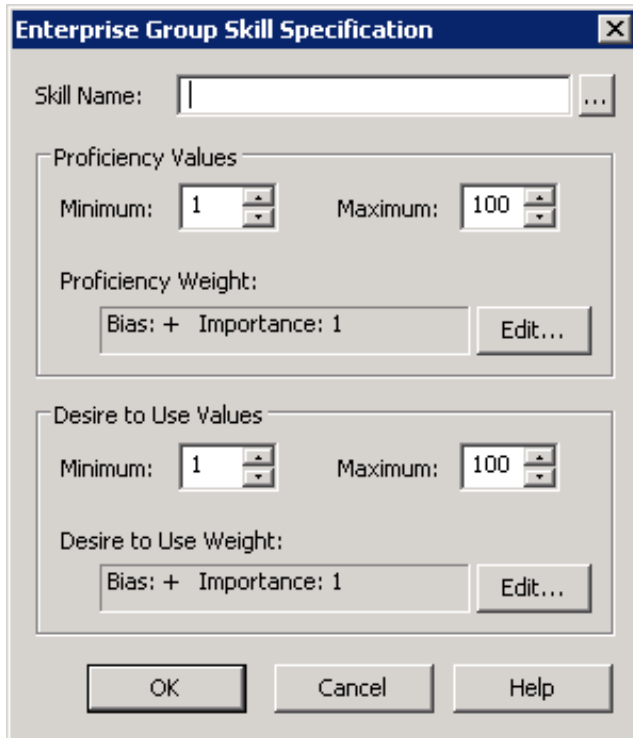
The **Skills** page of the **New Enterprise Group Configuration** wizard or the **Skills** tab in the **Enterprise Group Configuration** dialog box allows you to add a skill for the enterprise group.

To add a skill

1. Do one of the following:

- If you are adding an enterprise group, open the **Skills** page of the **New Enterprise Group Configuration** wizard. For more information, see [Add an Enterprise Group](#).
- If you are modifying an enterprise group, open the **Skills** tab in the **Enterprise Group Configuration** dialog box. For more information, see [Modify an Enterprise Group](#).

2. Click **Add...** The **Enterprise Group Skill Specification** dialog box appears.



The dialog box titled "Enterprise Group Skill Specification" contains the following fields and controls:

- Skill Name:** A text input field with an ellipsis button to its right.
- Proficiency Values section:**
 - Minimum:** A spinner box set to 1.
 - Maximum:** A spinner box set to 100.
 - Proficiency Weight:** A section containing a text box with "Bias: + Importance: 1" and an "Edit..." button.
- Desire to Use Values section:**
 - Minimum:** A spinner box set to 1.
 - Maximum:** A spinner box set to 100.
 - Desire to Use Weight:** A section containing a text box with "Bias: + Importance: 1" and an "Edit..." button.
- Buttons:** "OK", "Cancel", and "Help" at the bottom.

Skill Name: Name of the skill to assign to the workgroup.

Proficiency Values section:

Minimum: Agent's minimum proficiency level for this skill, in a range from 1 to 100.

Maximum: Agent's maximum proficiency level for this skill, in a range from 1 to 100. For example, if the skill is Spanish and the minimum proficiency is 70 and the maximum is 100, Director looks for agents whose language proficiency is 70 out of a possible 100-point range.

Proficiency Weight: Indicates whether the proficiency has a negative or positive bias and the weight of the proficiency's influence on the routing calculation.

Desire to Use section:

Minimum: Agent's minimum desire to use this skill, in a range from 1 to 100.

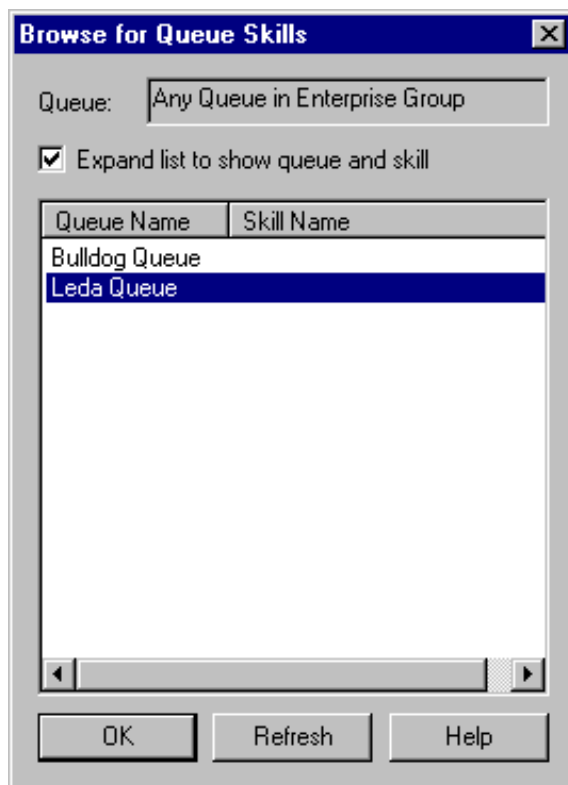
Maximum: Agent's maximum desire to use this skill, in a range from 1 to 100.

Desire to Use Weight: Indicates whether the "desire to use" has a positive or negative bias and its weight of importance.

3. In the **Skill Name** box, type the name of the skill or, to select a queue skill, do the following:
 - a. Click the ellipsis (...). The **Browse for Queue Skills** dialog box appears.

Note:

This dialog box displays the skills associated to queues in the enterprise group. Only skills that you defined previously (using the **Skills** container) and assigned at the workgroup or agent level appear in this list box. Selecting a skill from this dialog box ensures that the skill name is valid. If you type a skill name, no validation occurs to verify that the skill name is valid.



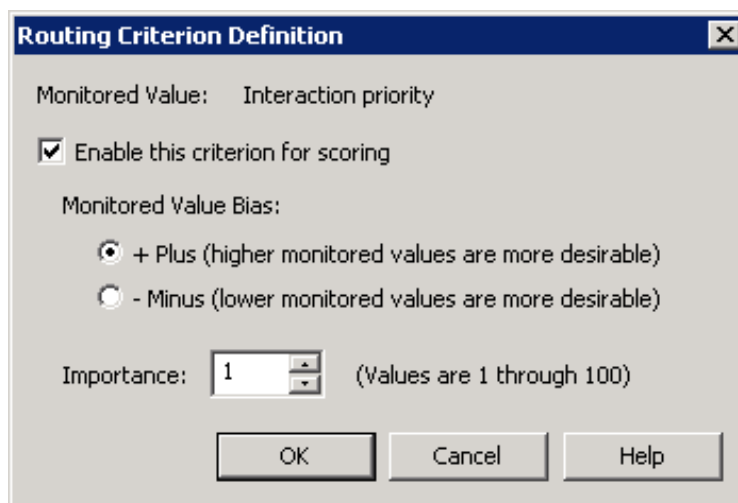
Queue: Displays "Any Queue in Enterprise Group" to indicate that the skills can derive from more than one queue. You cannot change this value.

Expand list to show queue and skill: If selected, displays the **Queue Name** and the **Skill Name** columns. If cleared, displays the **Skill Name** column only.

Queue Name: Name of the queue to which Interaction Director can route interactions.

Skill Name: Name of the skill to associate to the workgroup.

- b. Select or clear the **Expand list to show queue and skill** check box.
 - c. Click the skill name to associate to the workgroup and then click **OK**. The **Browse for Queue Skills** dialog box closes.
4. In the **Proficiency Values** section, do the following:
- a. Type or select the agent's minimum and maximum proficiency levels for this skill.
 - b. Click **Edit**. The **Routing Criterion Definition** dialog box appears.



Enable this criterion for scoring: If selected, Director's scoring algorithm evaluates the proficiency weight. If cleared, "Not used" appears in the Routing Criteria list.

+ Plus (higher monitored values are more desirable): If selected, higher scoring values are more desirable.

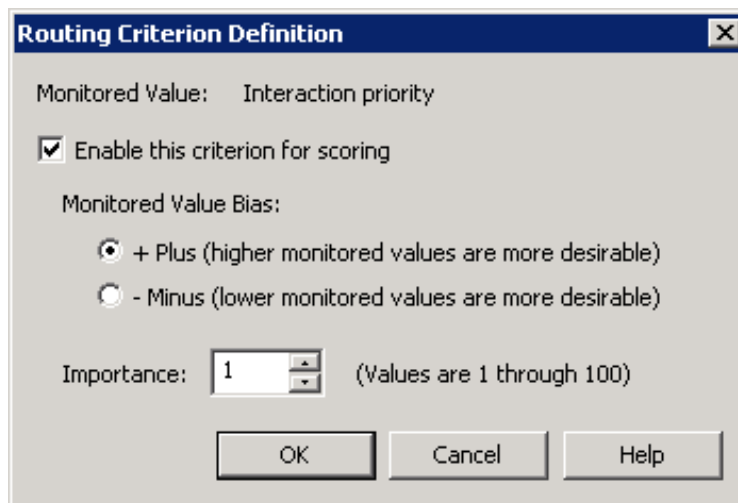
- **Minus (lower monitored values are more desirable):** If selected, lower scoring values are more desirable.

Note:

Interactions go to the agent (in post-call) or queue (in pre-call) with the highest score. A positive (+) bias tends to increase the score; a negative (-) bias decreases the score.

Importance: Numeric value between 1 and 100 that weights the criteria's influence on the routing calculation. Assign more important criteria a higher weight. Importance works with the bias setting to indicate whether a higher number is more desirable or less desirable. For example, whether a higher number means that the agent can receive the call or a higher number means that the agent cannot receive the call. Higher weight makes a specific factor affect the score more in whatever direction the bias specifies.

- c. Select **Enable this criterion for scoring**.
 - d. Click an option in the **Monitored Value Bias** section.
 - e. In the **Importance** box, type or select the weight of importance and then click **OK**. The **Routing Criterion Definition** dialog box closes.
5. In the **Desire to Use Values** section, do the following:
- a. Type or select the agent's minimum and maximum "desire to use" levels for this skill.
 - b. Click **Edit**. The **Routing Criterion Definition** dialog box appears.



Enable this criterion for scoring: If selected, Director's scoring algorithm evaluates the "desire to use" weight. If cleared, "Not used" appears in the Routing Criteria list.

+ Plus (higher monitored values are more desirable): If selected, higher scoring values are more desirable.

- Minus (lower monitored values are more desirable): If selected, lower scoring values are more desirable.

Note:

Interactions go to the agent (in post-call) or queue (in pre-call) with the highest score. A positive (+) bias tends to increase the score; a negative (-) bias decreases the score.

Importance: Numeric value between 1 and 100 that weights the criteria's influence on the routing calculation. Assign more important criteria a higher weight. Importance works with the bias setting to indicate whether a higher number is more desirable or less desirable. For example, whether a higher number means that the agent can receive the call or a higher number means that the agent cannot receive the call. Higher weight makes a specific factor affect the score more in whatever direction the bias specifies.

- c. Select **Enable this criterion for scoring**.
 - d. Click an option in the **Monitored Value Bias** section.
 - e. In the **Importance** box, type or select the weight of importance and then click **OK**. The **Routing Criterion Definition** dialog box closes.
6. In the **Enterprise Group Skills Specification** dialog box, click **OK**.
7. Do one of the following:

In the **New Enterprise Group Configuration** wizard, click **Finish**.

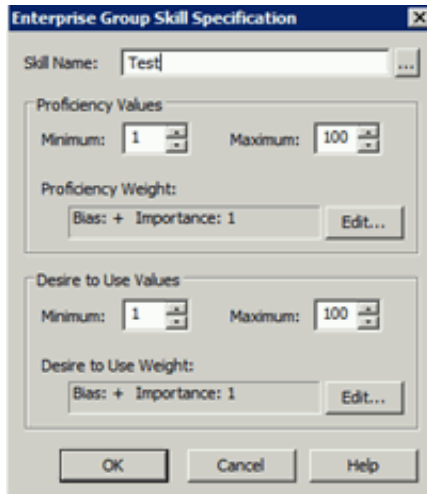
In the **Enterprise Group Configuration** dialog box, click **OK**.

Modify a Skill

The **Skills** page of the **New Enterprise Group Configuration** wizard or the **Skills** tab in the **Enterprise Group Configuration** dialog box allows you to modify a skill for the enterprise group.

To modify a skill

1. Do one of the following:
 - If you are adding an enterprise group, open the **Skills** page of the **New Enterprise Group Configuration** wizard. For more information, see [Add an Enterprise Group](#).
 - If you are modifying an enterprise group, open the **Skills** tab in the **Enterprise Group Configuration** dialog box. For more information, see [Modify an Enterprise Group](#).
2. Click a skill and then click **Edit...** The **Enterprise Group Skill Specification** dialog box appears.

The image shows the 'Enterprise Group Skill Specification' dialog box. It has a title bar with the text 'Enterprise Group Skill Specification' and a close button. The main area contains several sections: 'Skill Name' with a text box containing 'Test' and a dropdown arrow; 'Proficiency Values' with 'Minimum' and 'Maximum' spinners set to 1 and 100 respectively, and a 'Proficiency Weight' section with 'Bias: + Importance: 1' and an 'Edit...' button; 'Desire to Use Values' with similar 'Minimum' and 'Maximum' spinners; and 'Desire to Use Weight' with 'Bias: + Importance: 1' and an 'Edit...' button. At the bottom are 'OK', 'Cancel', and 'Help' buttons.

Skill Name: Name of the skill to assign to the workgroup.

Proficiency Values section:

Minimum: Agent's minimum proficiency level for this skill, in a range from 1 to 100.

Maximum: Agent's maximum proficiency level for this skill, in a range from 1 to 100. For example, if the skill is Spanish and the minimum proficiency is 70 and the maximum is 100, Director looks for agents whose language proficiency is 70 out of a possible 100-point range.

Proficiency Weight: Indicates whether the proficiency has a negative or positive bias and the weight of the proficiency's influence on the routing calculation.

Desire to Use section:

Minimum: Agent's minimum desire to use this skill, in a range from 1 to 100.

Maximum: Agent's maximum desire to use this skill, in a range from 1 to 100.

Desire to Use Weight: Indicates whether the "desire to use" has a positive or negative bias and its weight of importance.

3. Modify the information and then click **OK**.
4. Do one of the following:
 - In the **New Enterprise Group Configuration** wizard, click **Finish**.
 - In the **Enterprise Group Configuration** dialog box, click **OK**.

Delete a Skill

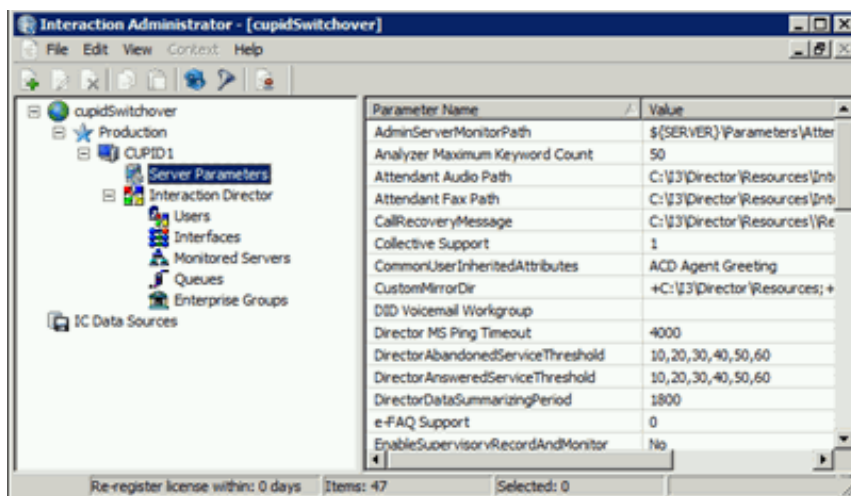
The **Skills** page of the **New Enterprise Group Configuration** wizard or the **Skills** tab in the **Enterprise Group Configuration** dialog box allows you to delete a skill from the enterprise group.

To delete a skill

1. Do one of the following:
 - If you are adding an enterprise group, open the **Skills** page of the **New Enterprise Group Configuration** wizard. For more information, see [Add an Enterprise Group](#).
 - If you are modifying an enterprise group, open the **Skills** tab in the **Enterprise Group Configuration** dialog box. For more information, see [Modify an Enterprise Group](#).
2. Click a skill and then click **Delete...** The system removes the skill from the enterprise group.
3. Click **OK**.

Server Parameters Container

The **Server Parameters** container in Interaction Administrator allows you to view the server parameters that the Interaction Director install created. Handlers and other CIC server modules use these parameters. For more information about maintaining server parameters, see the *Interaction Administrator Help* at https://help.genesys.com/cic/mergedProjects/wh_ia/desktop/interaction_administrator_help.htm.



Parameter Name	Value
DirectorAbandonedServiceThreshold	The QueryAbnServiceThresholdValues handler uses this parameter to summarize reporting data. Its default value is "5,10,15,20,25,30."
DirectorAnsweredServiceThreshold	The QueryAnsServiceThresholdValues handler uses this parameter to summarize reporting data. Its default value is "10,20,30,40,50,60."
DirectorDataSummarizingPeriod	The SummarizeDirectorData handler uses this parameter to summarize reporting data. The default value is "1800."
Handler Path	Path to Director handlers.
I3Tables Path	Path to the table data that Director handlers use.
License File	The path to, and file name of, the CIC server license file. Do not change this value unless PureConnect Customer Care instructs you to do so.
License Host ID	Unique code that identifies the CIC server and locks a license to the CIC server. If you replace the network card on your CIC server, contact PureConnect Customer Care to get a new license file. Do not change this value unless PureConnect Customer Care instructs you to do so.

Monitored Server Versions	List of CIC version numbers, delimited by vertical bars.
Server Path	Directory that contains Director components.
ServerReportLogDataDestination	Path to the report logs on the CIC server.
Switchover Monitoring	Allows monitoring of Interaction Processor in Interaction Director configurations, instead of Telephony Services. The default value is "IP." For use in Interaction Director switchover systems.
SwitchoverServer A	Active server in the switchover pair. It remains active until a switchover event.
SwitchoverServer B	Backup server in the switchover pair. It remains the backup server until a switchover event.
Switch Type	Type of switch control used between the two Switchover servers. For Interaction Director, set the value to "None."
Temp Path	Path to the temporary files that the operating system uses.
Work Path	Path to the work files that Interaction Director uses.
Switchover NetTest A (Optional)	<p>Name or IP address of a computer on the same network segment as SwitchoverServer B. The Switchover process on SwitchoverServer A uses it when SwitchoverServer A is the backup server.</p> <p>When the system detects a failure condition, Switchover on the backup server attempts to ping (ICMP echo) the IP endpoint found on the same network segment as the active server. If Switchover cannot ping this endpoint, it assumes that the active server is still operable and not switch because there was a WAN failure.</p> <p>For use with Switchover in WAN environments.</p>
Switchover NetTest B (Optional)	<p>Name or IP address of a computer on the same network segment as SwitchoverServer A. The Switchover process on SwitchoverServer B uses it when SwitchoverServer B is the backup server. Same functionality as SwitchoverNetTestA, except that Switchover B is running as the backup server.</p> <p>Genesys recommends that you set the value for Switchover NetTest B to the closest —pingable (ICMP echo) IP address to SwitchoverServer A from SwitchoverServer B.</p> <p>For use with Switchover in WAN environments.</p>
Switchover NetTest Timeout (Optional)	Amount of time (in seconds) for Switchover to wait for the ICMP echo to return. The default value is 1 second. Used with Switchover NetTestA and SwitchoverNetTestB in WAN environments.

Workgroup Configuration

The **Director** tab in the **Workgroup Configuration** dialog box allows you to configure workgroups. On both CIC 3.0 and 4.0 or newer servers, installation of Director adds a **Director** tab to the **Workgroup Configuration** dialog box in Interaction Administrator. This tab allows you to manage settings that apply exclusively to post-call routing. For more information about other tabs in the **Workgroup Configuration** dialog box, see the *Interaction Administrator Help* at https://help.genesys.com/cic/mergedProjects/wh_ia/desktop/interaction_administrator_help.htm.

Related topics:

- [Configure ACD Workgroups](#)
- [Configure Workgroup Errors](#)
- [Configure Workgroup Overflow](#)
- [Workgroup Skills Configuration](#)

Configure ACD Workgroups

The **Director** tab in the **Workgroup Configuration** dialog box allows you to configure ACD workgroups for Interaction Director.

To configure ACD workgroups

1. On the Monitored Server, open Interaction Administrator and then click the **Workgroups** container.
2. In the list view, double-click the ACD workgroup for Director to monitor. The **Workgroup Configuration** dialog box appears.
3. Click the **Director** tab and then click **Configuration**. The following example shows the dialog box in CIC 4.0 or later versions. This dialog box looks similar on CIC 3.0 servers and the configuration options are identical.

The screenshot shows the 'Workgroup Configuration - Support' dialog box. The 'Director' tab is selected, and the 'Configuration' sub-tab is active. On the left, there are buttons for 'Configuration', 'Skills', 'Overflow', and 'Errors'. The main area contains the following settings:

- ☒ **Enable Director Processing on this workgroup**
- Enterprise**: A text box containing 'Support' and an ellipsis button (...).
- Interactions** section:
 - Priority**: A spinner box set to 50.
 - In queue timeout**: A spinner box set to 0, followed by the text 'seconds'.

At the bottom, there are navigation arrows, a ☒ **Confirm auto-save** checkbox, and 'OK', 'Cancel', and 'Apply' buttons.

Enable Director Processing on this workgroup: If selected, Director processes all calls that the workgroup receives. If cleared, the local ACD processes all calls that the workgroup receives.

Enterprise Group: Enterprise Group for the workgroup to query. The workgroup does not have to be a member of the enterprise group on the Director server.

Priority: Interaction priority that all interactions in this queue inherit initially. Values can range from 1 to 100. The default priority is 50; higher numbers indicate higher priority.

In queue timeout: Number of seconds for Director to wait for an Agent to pick up the call before running in-queue timeout actions (running a handler). Director notifies CIC when this time limit passes. CIC can do any action (using a customized handler) such as playing a prompt or transferring a call.

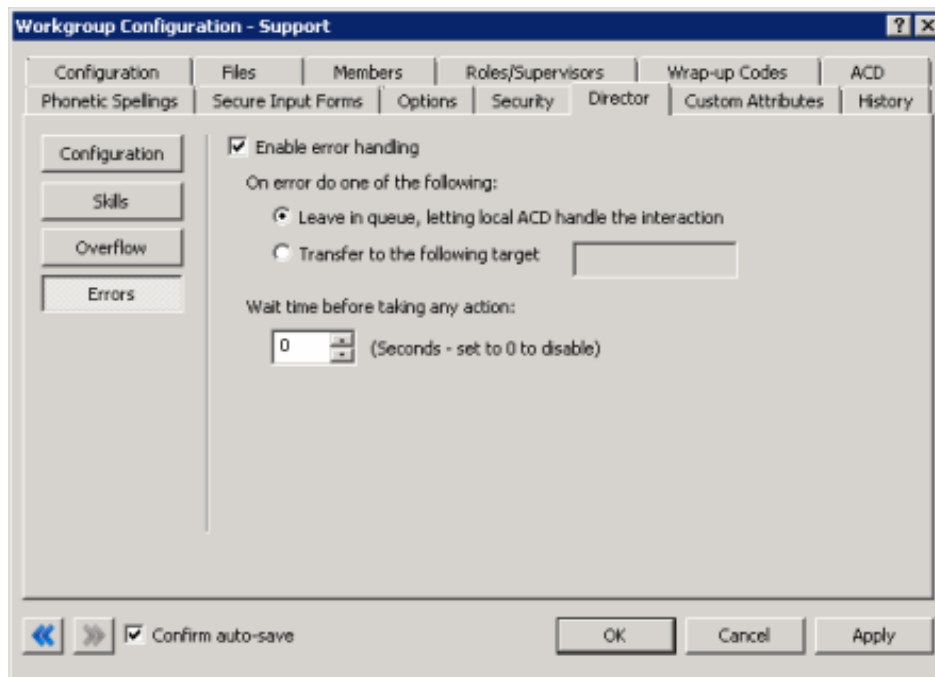
4. Select **Enable Director Processing on this workgroup**.
5. Next to the **Enterprise Group** box, click the ellipsis (...).
6. Click the enterprise group (previously defined on the Interaction Director server) to which this workgroup belongs.
7. Set the priority and timeout.
8. Complete these steps for other ACD workgroups that you want Director to evaluate to make a routing decision and then click **OK**. You do not have to configure workgroups that are merely destinations for Director-handled interactions.

Configure Workgroup Errors

The **Errors** tab in the **Workgroup Configuration** dialog box allows you to specify the flow of control when losing connectivity between Director and a CIC server while calls are waiting. When the CIC server cannot reach Director, it acts in accordance with the options specified in this dialog box. The possible actions are: wait indefinitely, wait a while and then transfer the call to the specified target, or wait a while and let local ACD handle it in place.

To configure workgroup errors

1. On the Monitored Server, open Interaction Administrator and then click the **Workgroups** container.
2. In the list view, double-click the ACD workgroup for Director to monitor. The **Workgroup Configuration** dialog box appears.
3. Click the **Director** tab and then click **Errors**.



Enable error handling: If selected, allows error processing.

Leave in queue, letting local ACD handle the interaction: If selected, the CIC server transfers calls to local ACD when there's an error instead of passing them to Director or post-call routing. The calls remain in the queue until the local ACD dispatches them.

Transfer to the following target: If selected, transfers the calls to a handler, which transfers them to the specified target.

[Target]: Workgroup, user name, phone extension, or external phone number (or any other transfer type that the Extended Blind Transfer (XBT) tool supports) to which to transfer the calls. For a workgroup or user name, the handler passes the calls to the Extended Blind Transfer tool. For all other targets, the handler passes the calls through the dial plan to XBT. If the transfer succeeds, no other processing occurs. If the transfer fails, calls transfer to the System queue, where the caller hears Main Menu prompts again.

Wait time before taking any action: Time (in seconds) to wait before attempting error recovery. If zero (0), attempts error recovery immediately. If the situation rectifies itself before reaching the specified wait time threshold, routing resumes where it left off. This feature can result in less churn in the waiting interaction if a short network glitch occurs. In releases before Director 2.3.1, this option wasn't available. Instead, Director attempted error recovery immediately.

4. Click OK.

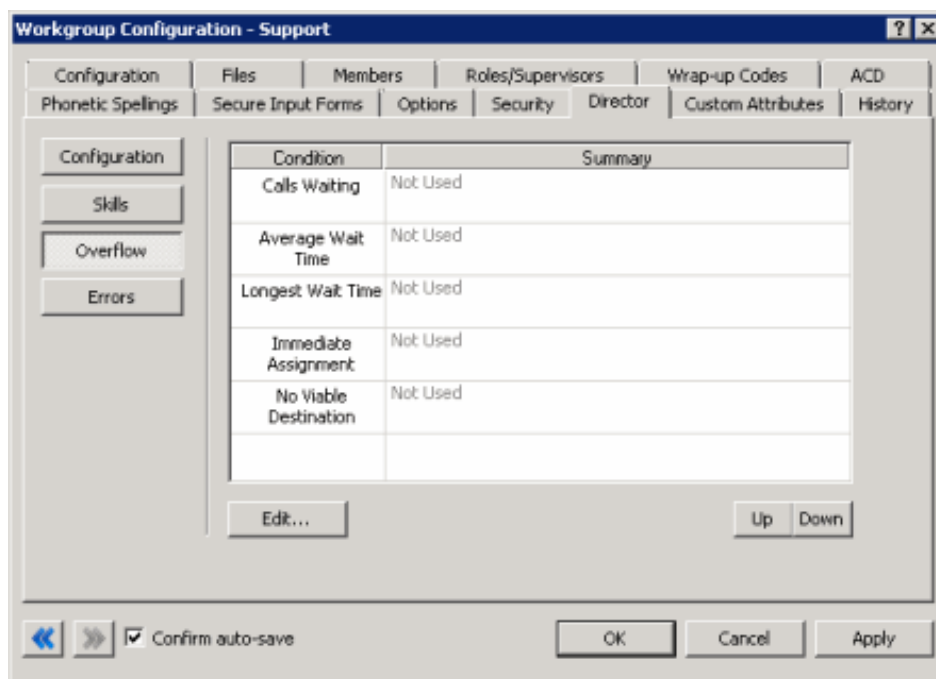
Configure Workgroup Overflow

The **Overflow** tab in the **Workgroup Configuration** dialog box allows you to edit and reorder (prioritize) the overflow rules (conditions) to evaluate when receiving an interaction using this queue. Overflow conditions specify when to queue an interaction. For example, when too many interactions are waiting, when wait time is too high, when an interaction is available to service immediately, and when there is no viable destination within an enterprise group. Director evaluates these post-call routing rules in top-down order. Director invokes a transfer for the first condition that fails.

These conditions within the Director system result in some action other than queuing the interaction. Director evaluates the conditions on this tab for a newly arrived interaction before accepting them (for example, enqueued). There are five conditions: Calls Waiting, Average Wait Time, Longest Wait Time, Immediate Assignment, and No Viable Destination. Director can evaluate the first three conditions at any rollup level (Queue, Enterprise Group, Server, System) yielding a great deal of flexibility. For each condition, you can specify a transfer target. It indicates where the interaction routes when that condition triggers.

To configure workgroup overflow

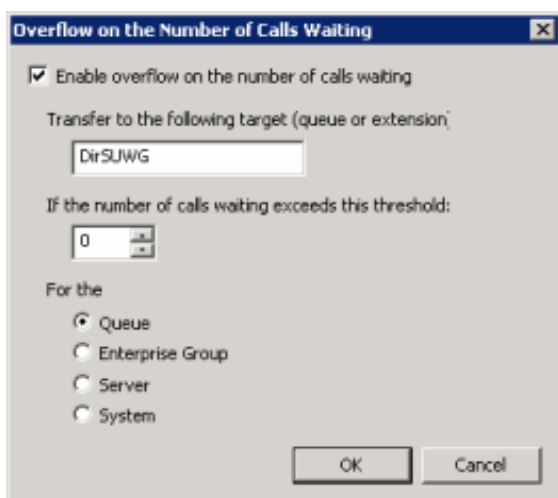
1. On the Monitored Server, open Interaction Administrator and then click the **Workgroups** container.
2. In the list view, double-click the ACD workgroup for Director to monitor. The **Workgroup Configuration** dialog box appears.
3. Click the **Director** tab and then click **Overflow**.



Condition: Conditions to evaluate when receiving an interaction into the system using this queue.

Summary: Summary of the configured condition. If the summary value is "Not Used," Director ignores the condition when evaluating interactions.

4. To edit the **Call Waiting** condition, do the following:
 - a. Click the condition and then click **Edit...** The **Overflow on the Number of Calls Waiting** dialog box appears.



Enable overflow on the number of calls waiting: If selected, transfers calls to the specified queue or phone extension when the number of calls waiting in the queue, enterprise group, server, or system exceeds the specified threshold.

Transfer to the following target (queue or extension): Queue or phone extension to which to transfer the calls.

If the number of calls waiting exceeds this threshold: Maximum number of calls that can wait in the queue, enterprise group, server, or system before transferring the calls to the specified target.

Queue: If selected, the condition applies to calls waiting in the queue.

Enterprise Group: If selected, the condition applies to calls waiting in the enterprise group.

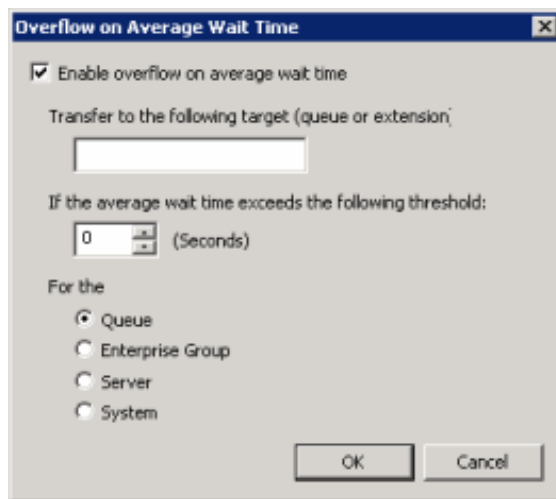
Server: If selected, the condition applies to calls waiting in the server.

System: If selected, the condition applies to calls waiting in the system.

- b. Complete the information and then click **OK**.

5. To edit the **Average Wait Time** condition, do the following:

- a. Click the condition and then click **Edit...** The **Overflow on Average Wait Time** dialog box appears.



Enable overflow on average wait time: If selected, transfers calls to the specified queue or phone extension when the average wait time for the queue, enterprise group, server, or system exceeds the specified number of seconds.

Transfer to the following target (queue or extension): Queue or phone extension to which to transfer the calls.

If the average wait time exceeds the following threshold: Average time (in seconds) that calls can wait in the queue, enterprise group, server, or system before transferring the calls to the specified target.

Queue: If selected, the condition applies to calls waiting in the queue.

Enterprise Group: If selected, the condition applies to calls waiting in the enterprise group.

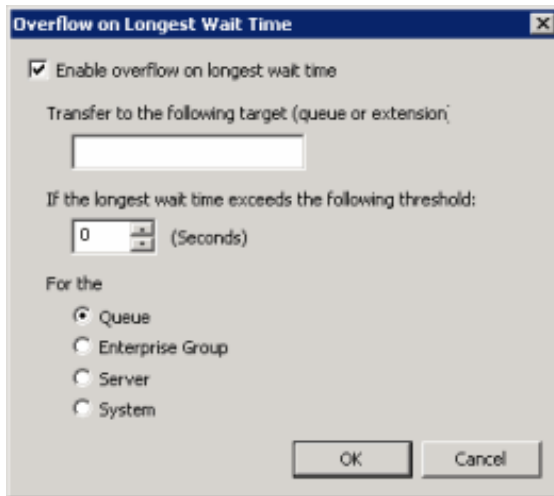
Server: If selected, the condition applies to calls waiting in the server.

System: If selected, the condition applies to calls waiting in the system.

- b. Complete the information and then click **OK**.

6. To edit the **Longest Wait Time** condition, do the following:

- a. Click the condition and then click **Edit...** The **Overflow on Longest Wait Time** dialog box appears.



Enable overflow on longest wait time: If selected, transfers calls to the specified queue or phone extension when the longest wait time for the queue, enterprise group, server, or system exceeds the specified number of seconds.

Transfer to the following target (queue or extension): Queue or phone extension to which to transfer the calls.

If the longest wait time exceeds the following threshold: Longest time (in seconds) that calls can wait in the queue, enterprise group, server, or system before transferring the calls to the specified target.

Queue: If selected, the condition applies to calls waiting in the queue.

Enterprise Group: If selected, the condition applies to calls waiting in the enterprise group.

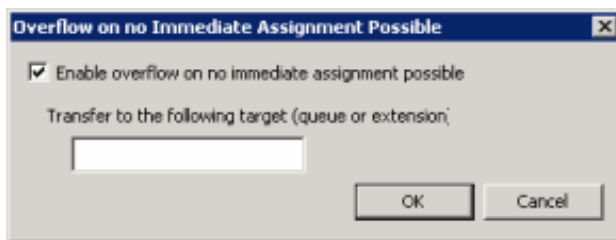
Server: If selected, the condition applies to calls waiting in the server.

System: If selected, the condition applies to calls waiting in the system.

b. Complete the information and then click **OK**.

7. To edit the **Immediate Assignment** condition, do the following:

a. Click the condition and then click **Edit...** The **Overflow on no Immediate Assignment Possible** dialog box appears.



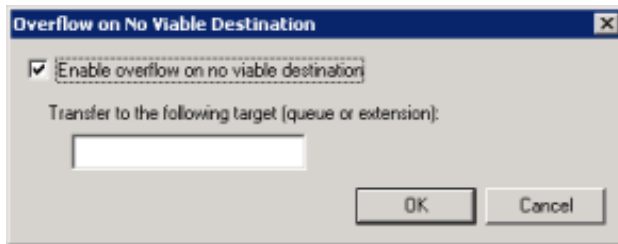
Enable overflow on no immediate assignment possible: If selected, transfers calls to the specified queue or phone extension when Director cannot assign the calls to a Monitored Server immediately because there are no candidate destinations.

Transfer to the following target (queue or extension): Queue or phone extension to which to transfer the calls.

b. Complete the information and then click **OK**.

8. To edit the **No Viable Destination** condition, do the following:

a. Click the condition and then click **Edit...** The **Overflow on No Viable Destination** dialog box appears.



Enable overflow on no viable destination: If selected, transfers calls to the specified queue or phone extension when there are no viable destinations within an enterprise group. In this situation, there are candidate destinations; however, all agents are busy, no agents meet the criteria for receiving the call, the enterprise group has no members, or all the member queues are down because of connection loss.

Transfer to the following target (queue or extension): Queue or phone extension to which to transfer the calls.

- b. Complete the information and then click **OK**.
9. To change the evaluation order, in the **Workgroup Configuration** dialog box, click **Up** or **Down**. Director evaluates the conditions in top-down order.
10. In the **Workgroup Configuration** dialog box, click **OK**.

Workgroup Skills Configuration

The **Skills** tab in the **Workgroup Configuration** dialog box allows you to configure workgroup skills for Interaction Director. Director evaluates skills to score and influence routing of calls to queues in an enterprise group. All interactions coming into the system using this workgroup require the listed skills.

Related topics:

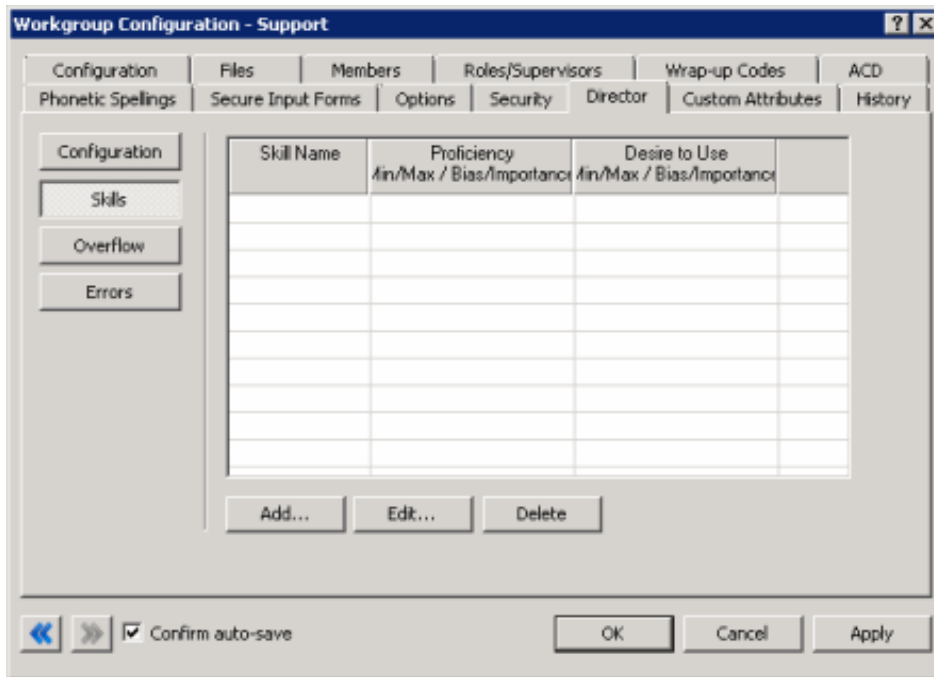
- [Add a Workgroup Skill](#)
- [Modify a Workgroup Skill](#)
- [Delete a Workgroup Skill](#)

Add a Workgroup Skill

The **Skills** tab in the **Workgroup Configuration** dialog box allows you to add a workgroup skill for Interaction Director. Director scores required skills against the skills of logged on agents when Director determines an interaction's target destination.

To add a workgroup skill

1. On the Monitored Server, open Interaction Administrator and then click the **Workgroups** container.
2. In the list view, double-click the ACD workgroup for Director to monitor. The **Workgroup Configuration** dialog box appears.
3. Click the **Director** tab and then click **Skills**.



4. Click **Add...** The **Enterprise Group Skill Specification** dialog box appears.

Skill Name: Name of the skill to assign to the workgroup.

Proficiency Values section:

Minimum: Agent's minimum proficiency level for this skill, in a range from 1 to 100.

Maximum: Agent's maximum proficiency level for this skill, in a range from 1 to 100. For example, if the skill is Spanish and the minimum proficiency is 70 and the maximum is 100, Director looks for agents whose language proficiency is 70 out of a possible 100-point range.

Proficiency Weight: Indicates whether the proficiency has a negative or positive bias and the weight of the proficiency's influence on the routing calculation.

Desire to Use section:

Minimum: Agent's minimum desire to use this skill, in a range from 1 to 100.

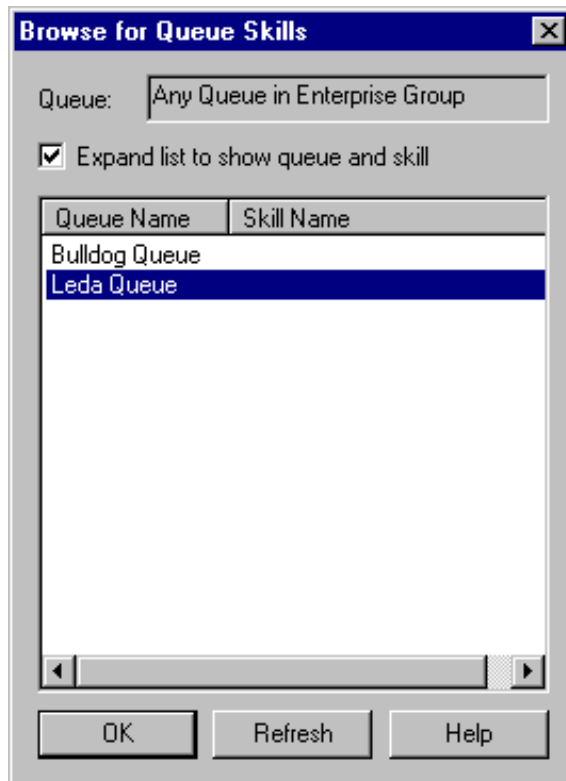
Maximum: Agent's maximum desire to use this skill, in a range from 1 to 100.

Desire to Use Weight: Indicates whether the "desire to use" has a positive or negative bias and its weight of importance.

5. In the **Skill Name** box, type the name of the skill or, to select a queue skill, do the following:
 - a. Click the ellipsis (...). The **Browse for Queue Skills** dialog box appears.

Note:

This dialog box displays the skills associated to queues. Only skills that you defined previously (using the **Skills** container) and assigned at the workgroup or agent level appear in this list box. Selecting a skill from this dialog box ensures that the skill name is valid. If you type a skill name, no validation occurs to verify that the skill name is valid.



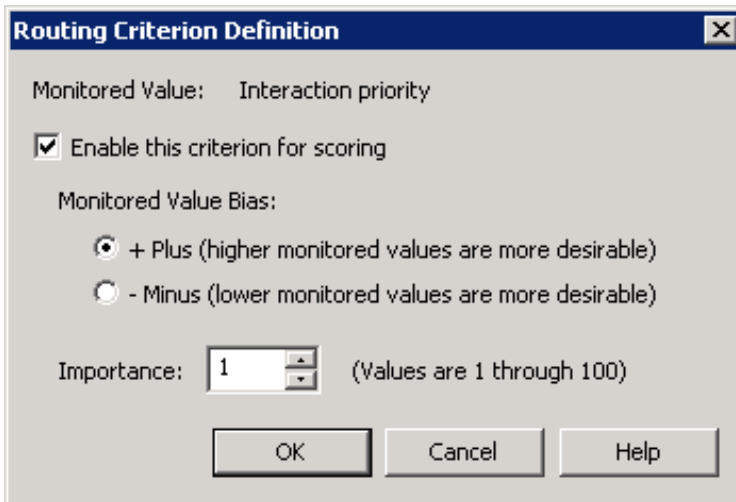
Queue: Displays "Any Queue in Enterprise Group" to indicate that the skills can derive from more than one queue. You cannot change this value.

Expand list to show queue and skill: If selected, displays the **Queue Name** and the **Skill Name** columns. If cleared, displays the **Skill Name** column only.

Queue Name: Name of the queue to which Interaction Director can route interactions.

Skill Name: Name of the skill to associate to the workgroup.

- b. Select or clear the **Expand list to show queue and skill** check box.
 - c. Click the skill name to associate to the workgroup and then click **OK**. The **Browse for Queue Skills** dialog box closes.
6. In the **Enterprise Group Skill Specification** dialog box, in the **Proficiency Values** section, type or select the agent's minimum and maximum proficiency levels for this skill.
7. In the **Proficiency Values** section, do the following:
 - a. Click **Edit**. The **Routing Criterion Definition** dialog box appears.



Routing Criterion Definition

Monitored Value: Interaction priority

☒ Enable this criterion for scoring

Monitored Value Bias:

☒ + Plus (higher monitored values are more desirable)

☐ - Minus (lower monitored values are more desirable)

Importance: (Values are 1 through 100)

OK Cancel Help

Enable this criterion for scoring: If selected, Director's scoring algorithm evaluates the proficiency weight. If cleared, "Not used" appears in the Routing Criteria list.

+ Plus (higher monitored values are more desirable): If selected, higher scoring values are more desirable.

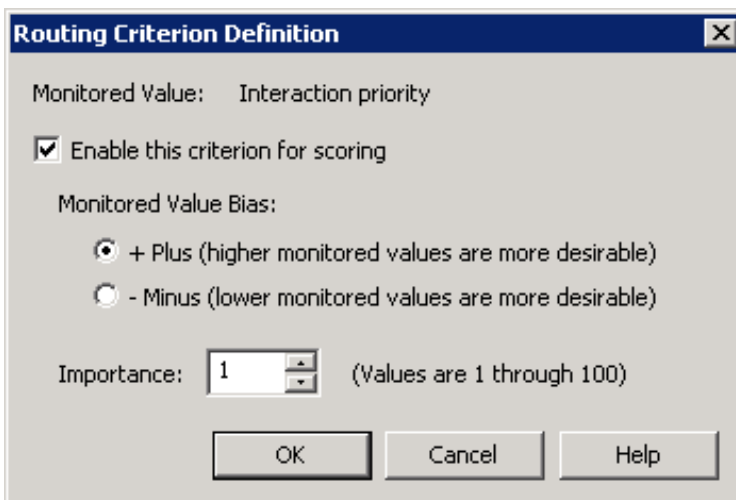
- Minus (lower monitored values are more desirable): If selected, lower scoring values are more desirable.

Note:

Interactions go to the agent (in post-call) or queue (in pre-call) with the highest score. A positive (+) bias tends to increase the score; a negative (-) bias decreases the score.

Importance: Numeric value between 1 and 100 that weights the criteria's influence on the routing calculation. Assign more important criteria a higher weight. Importance works with the bias setting to indicate whether a higher number is more desirable or less desirable. For example, whether a higher number means that the agent can receive the call or a higher number means that the agent cannot receive the call. Higher weight makes a specific factor affect the score more in whatever direction the bias specifies.

- b. Select **Enable this criterion for scoring**.
 - c. Click an option in the **Monitored Value Bias** section.
 - d. In the **Importance** box, type or select the weight of importance and then click **OK**. The **Routing Criterion Definition** dialog box closes.
8. In the **Enterprise Group Skills Specification** dialog box, in the **Desire to Use Values** section, type or select the agent's minimum and maximum "desire to use" levels for this skill.
 9. In the **Desire to Use Values** section, do the following:
 - a. Click **Edit**. The **Routing Criterion Definition** dialog box appears.



Routing Criterion Definition

Monitored Value: Interaction priority

☒ Enable this criterion for scoring

Monitored Value Bias:

☒ + Plus (higher monitored values are more desirable)

☐ - Minus (lower monitored values are more desirable)

Importance: (Values are 1 through 100)

OK Cancel Help

Enable this criterion for scoring: If selected, Director's scoring algorithm evaluates the "desire to use" weight. If cleared, "Not used" appears in the Routing Criteria list.

+ **Plus (higher monitored values are more desirable)**: If selected, higher scoring values are more desirable.

- **Minus (lower monitored values are more desirable)**: If selected, lower scoring values are more desirable.

Note:

Interactions go to the agent (in post-call) or queue (in pre-call) with the highest score. A positive (+) bias tends to increase the score; a negative (-) bias decreases the score.

Importance: Numeric value between 1 and 100 that weights the criteria's influence on the routing calculation. Assign more important criteria a higher weight. Importance works with the bias setting to indicate whether a higher number is more desirable or less desirable. For example, whether a higher number means that the agent can receive the call or a higher number means that the agent cannot receive the call. Higher weight makes a specific factor affect the score more in whatever direction the bias specifies.

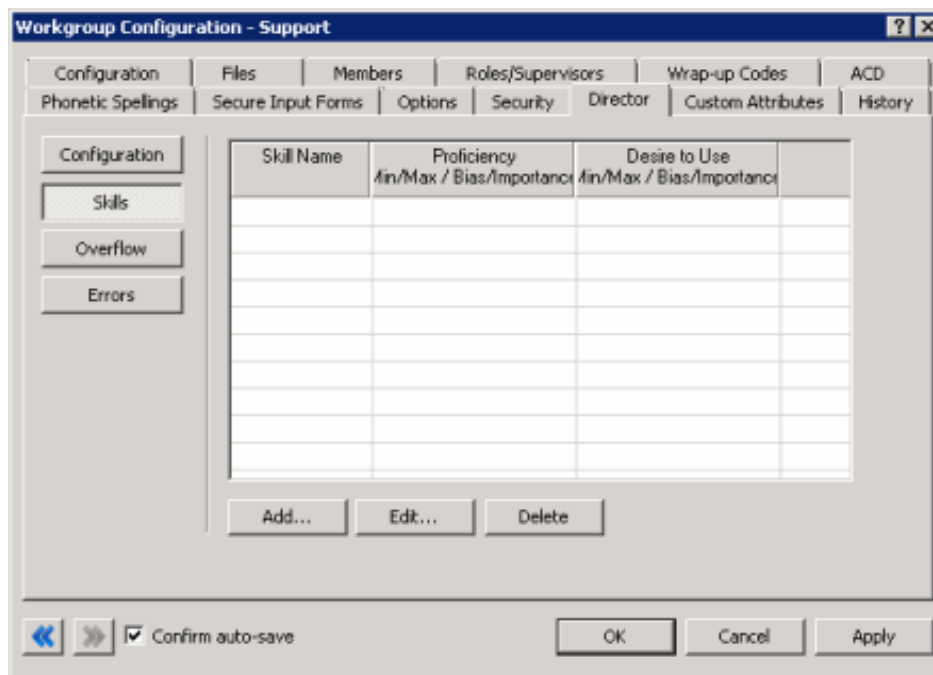
- b. Select **Enable this criterion for scoring**.
 - c. Click an option in the **Monitored Value Bias** section.
 - d. In the **Importance** box, type or select the weight of importance and then click **OK**. The **Routing Criterion Definition** dialog box closes.
10. In the **Enterprise Group Skills Specification** dialog box, click **OK**.
 11. In the **Workgroup Configuration** dialog box, click **OK**.

Modify a Workgroup Skill

The **Skills** tab in the **Workgroup Configuration** dialog box allows you to modify a workgroup skill for Interaction Director. Director scores required skills against the skills of logged on agents when Director determines an interaction's target destination.

To modify a workgroup skill

1. On the Monitored Server, open Interaction Administrator and then click the **Workgroups** container.
2. In the list view, double-click the ACD workgroup for Director to monitor. The **Workgroup Configuration** dialog box appears.
3. Click the **Director** tab and then click **Skills**.



4. Click the skill to modify and then click **Edit...** The **Enterprise Group Skill Specification** dialog box appears.

Skill Name: Name of the skill to assign to the workgroup.

Proficiency Values section:

Minimum: Agent's minimum proficiency level for this skill, in a range from 1 to 100.

Maximum: Agent's maximum proficiency level for this skill, in a range from 1 to 100. For example, if the skill is Spanish and the minimum proficiency is 70 and the maximum is 100, Director looks for agents whose language proficiency is 70 out of a possible 100-point range.

Proficiency Weight: Indicates whether the proficiency has a negative or positive bias and the weight of the proficiency's influence on the routing calculation.

Desire to Use section:

Minimum: Agent's minimum desire to use this skill, in a range from 1 to 100.

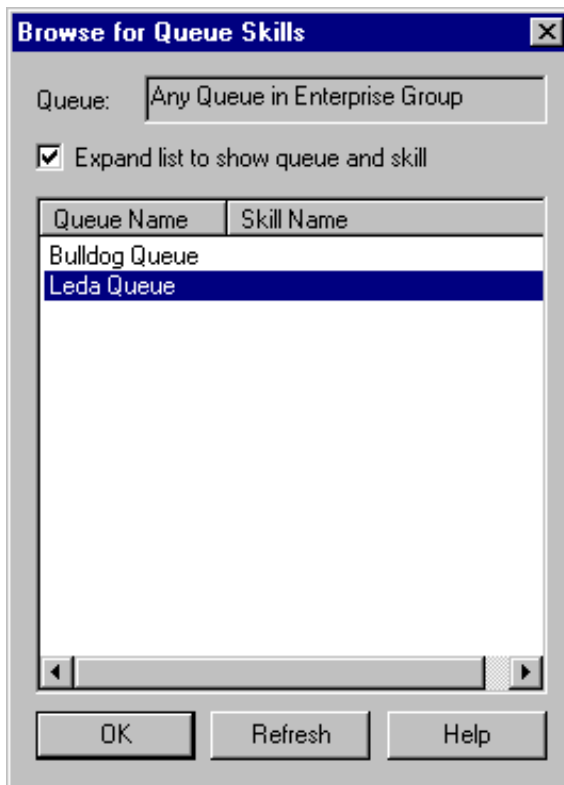
Maximum: Agent's maximum desire to use this skill, in a range from 1 to 100.

Desire to Use Weight: Indicates whether the "desire to use" has a positive or negative bias and its weight of importance.

5. To change the skill, in the **Skill Name** box, type the name of the skill or, to select a queue skill, do the following:
 - a. Click the ellipsis (...). The **Browse for Queue Skills** dialog box appears.

Note:

This dialog box displays the skills associated to queues. Only skills that you defined previously (using the **Skills** container) and assigned at the workgroup or agent level appear in this list box. Selecting a skill from this dialog box ensures that the skill name is valid. If you type a skill name, no validation occurs to verify that the skill name is valid.



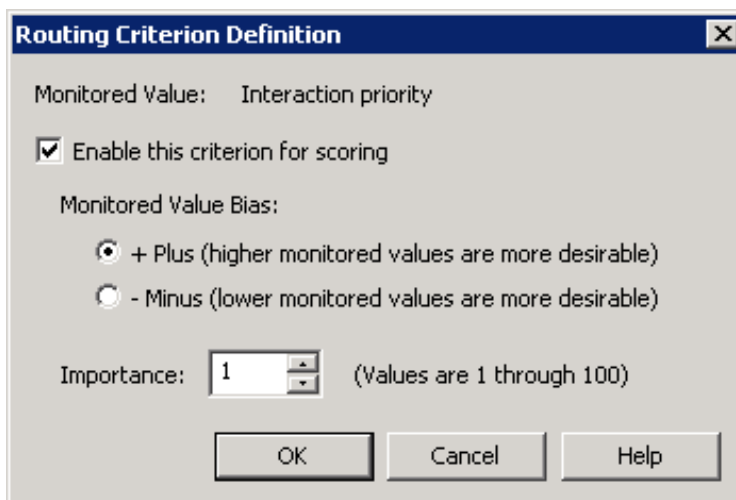
Queue: Displays "Any Queue in Enterprise Group" to indicate that the skills can derive from more than one queue. You cannot change this value.

Expand list to show queue and skill: If selected, displays the **Queue Name** and the **Skill Name** columns. If cleared, displays the **Skill Name** column only.

Queue Name: Name of the queue to which Interaction Director can route interactions.

Skill Name: Name of the skill to associate to the workgroup.

- b. Select or clear the **Expand list to show queue and skill** check box.
 - c. Click the skill name to associate to the workgroup and then click **OK**. The **Browse for Queue Skills** dialog box closes.
6. To modify the proficiency levels, in the **Enterprise Group Skill Specification** dialog box, in the **Proficiency Values** section, type or select the agent's minimum and maximum proficiency levels for this skill.
 7. To modify the proficiency weight, in the **Proficiency Values** section, do the following:
 - a. Click **Edit**. The **Routing Criterion Definition** dialog box appears.



Enable this criterion for scoring: If selected, Director's scoring algorithm evaluates the proficiency weight. If cleared, "Not used" appears in the Routing Criteria list.

+ Plus (higher monitored values are more desirable): If selected, higher scoring values are more desirable.

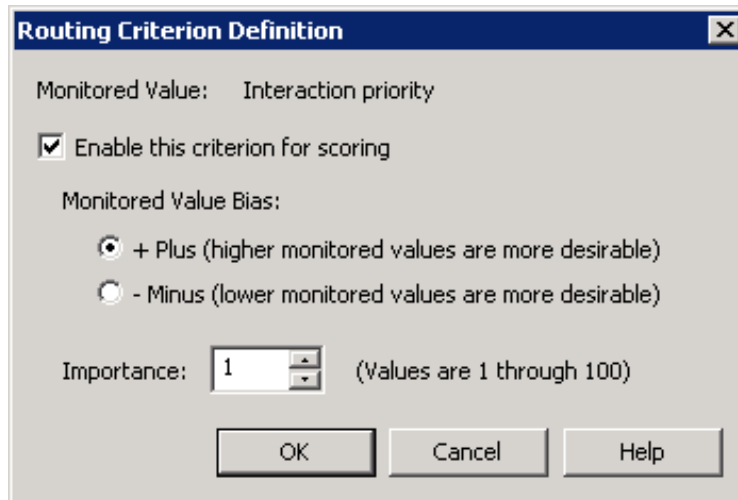
- Minus (lower monitored values are more desirable): If selected, lower scoring values are more desirable.

Note:

Interactions go to the agent (in post-call) or queue (in pre-call) with the highest score. A positive (+) bias tends to increase the score; a negative (-) bias decreases the score.

Importance: Numeric value between 1 and 100 that weights the criteria's influence on the routing calculation. Assign more important criteria a higher weight. Importance works with the bias setting to indicate whether a higher number is more desirable or less desirable. For example, whether a higher number means that the agent can receive the call or a higher number means that the agent cannot receive the call. Higher weight makes a specific factor affect the score more in whatever direction the bias specifies.

- b. Select or clear the **Enable this criterion for scoring** check box.
 - c. To change the bias, click an option in the **Monitored Value Bias** section.
 - d. To change the importance, in the **Importance** box, type or select the weight of importance and then click **OK**. The **Routing Criterion Definition** dialog box closes.
8. To change the "desire to use" level, in the **Enterprise Group Skills Specification** dialog box, in the **Desire to Use Values** section, type or select the agent's minimum and maximum "desire to use" levels for this skill.
 9. To change the "desire to use" weight, in the **Desire to Use Values** section, do the following:
 - a. Click **Edit**. The **Routing Criterion Definition** dialog box appears.



Enable this criterion for scoring: If selected, Director's scoring algorithm evaluates the "desire to use" weight. If cleared, "Not used" appears in the Routing Criteria list.

+ Plus (higher monitored values are more desirable): If selected, higher scoring values are more desirable.

- Minus (lower monitored values are more desirable): If selected, lower scoring values are more desirable.

Note:

Interactions go to the agent (in post-call) or queue (in pre-call) with the highest score. A positive (+) bias tends to increase the score; a negative (-) bias decreases the score.

Importance: Numeric value between 1 and 100 that weights the criteria's influence on the routing calculation. Assign more important criteria a higher weight. Importance works with the bias setting to indicate whether a higher number is more desirable or less desirable. For example, whether a higher number means that the agent can receive the call or a higher number means that the agent cannot receive the call. Higher weight makes a specific factor affect the score more in whatever direction the bias specifies.

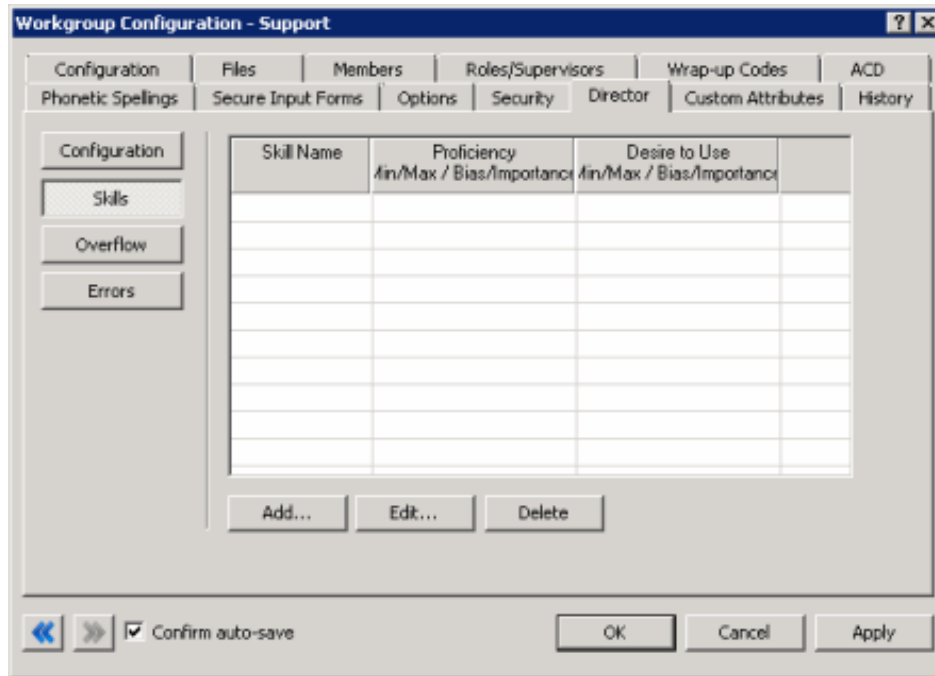
- b. Select or clear the **Enable this criterion for scoring** check box.
 - c. To change the bias, click an option in the **Monitored Value Bias** section.
 - d. To change the importance, in the **Importance** box, type or select the weight of importance and then click **OK**. The **Routing Criterion Definition** dialog box closes.
10. In the **Enterprise Group Skills Specification** dialog box, click **OK**.
 11. In the **Workgroup Configuration** dialog box, click **OK**.

Delete a Workgroup Skill

The **Skills** tab in the **Workgroup Configuration** dialog box allows you to delete a workgroup skill.

To delete a workgroup skill

1. On the Monitored Server, open Interaction Administrator and then click the **Workgroups** container.
2. In the list view, double-click the ACD workgroup for Director to monitor. The **Workgroup Configuration** dialog box appears.
3. Click the **Director** tab and then click **Skills**.



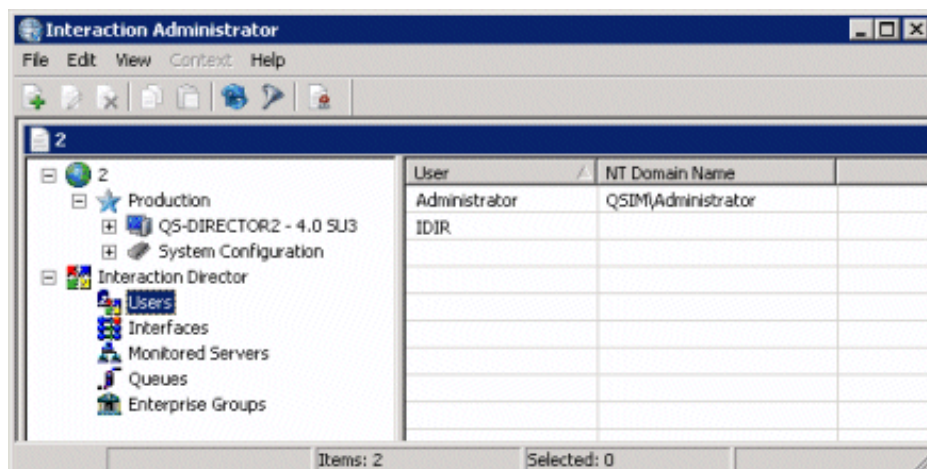
4. Click the skill to remove and then click **Delete**. Interaction Administrator removes the workgroup skill.
5. Click **OK**.

Add Notes to History

The **History** tab allows you to add notes about changes to a configuration item. Not all configuration dialog boxes have a **History** tab. The **History** tab is available when you edit configuration items. It isn't available when you add configuration times in wizard mode.

To add notes to history

1. In Interaction Administrator, click the Interaction Director node or click an Interaction Director container.



2. In the list view, double-click an option. The associated dialog box appears.

3. Click the **History** tab.

The screenshot shows a window titled "User Configuration - Example_User". It has two tabs: "Interaction Director User" and "History". The "History" tab is active. Below the tabs, there is a text prompt: "Enter notes about configuration settings and changes." Below this, there are two date fields: "Last Modified:" and "Date Created:", both showing the date and time "04/25/2005 05:02:55 PM". Below the dates is a large text area labeled "Notes" with the placeholder text "Type free-form notes here". At the bottom of the window are several buttons: "<<", ">>", a checked checkbox for "Confirm auto-save", "OK", "Cancel", "Apply", and "Help".

Last Modified: Date you last updated the notes.

Date Created: Date you saved the configuration item initially. If a setup program created the configuration item initially, this date could be blank.

Notes: Notes regarding your changes to the configuration.

4. In the **Notes** box, type a note regarding your changes to the configuration and the date you added the note.

Tip:

To insert a blank line in the **Notes** box, click where you want to insert the line, press and hold the **Ctrl** key, and then press the **Enter** key. Interaction Administrator inserts a blank line.

5. Do one of the following:

- To save your changes and keep the dialog box open, click **Apply**. Interaction Administrator saves your changes, updates the **Last Modified** date, and keeps the dialog box open.
- To save your changes and close the dialog box, click **OK**. Interaction Administrator saves your changes, updates the **Last Modified** date, and closes the dialog box.
- To close the dialog box without saving your changes, click **Cancel**. Interaction Administrator closes the dialog box without saving your changes and without updating the **Last Modified** date.

Note:

Interaction Administrator updates the **Last Modified** date each time you click **Apply** or **OK**. To avoid updating this date when you didn't modify the notes, click **Cancel**.

Change Log

The following table lists the changes to the *Interaction Director Installation and Configuration Guide* since its initial release.

Date	Change
19-May-2017	Added a note about assigning a unique Site ID to all IC servers. See the following topics: <ul style="list-style-type: none">• Install Director Server without Switchover• Install Primary Director Server in a Switchover Pair• Install Secondary Director Server in a Switchover Pair
10-January-2018	Rebranded to Genesys.
20-March-2018	Updated document format.
04-June-2019	Reorganized the content only, which included combining some topics and deleting others that just had an introductory sentence such as, "In this section..."
14-May-2020	Replaced links to inin.com with links to genesys.com .