PureConnect®

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See Change Log for summary of changes.

GENESYS™

PureConnect Licensing

Technical Reference

Abstract

This document describes the system management for licensing PureConnect products. It includes steps for managing license information using the Genesys License Management website and allocating licenses using Interaction Administrator.

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

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

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Introduction to PureConnect Licensing

PureConnect uses an application server license model. All product features install at once, and you decide when to activate them by allocating the licenses for them. Various license types offer you flexibility in developing new applications and performing trials on new functionality.

If your environment has multiple servers, allocate the appropriate licenses for each server separately.

Customer Interaction Center (CIC) supports two interaction management client applications. The *PureConnect Licensing Technical Reference* uses the term CIC client to refer to either Interaction Connect or Interaction Desktop.

Important!
Beginning March 2018, the Activation File Management Tool replaces the License Management System for PureConnect products. Also, the anniversary date and re-registration process are no longer applicable because PureConnect now uses perpetual software licenses with an expiration date of 1/1/2100. For more information, see New Licensing System.

New Licensing System

Customers and partners can now use the Activation File Management Tool (AFMT) to manage and configure PureConnect product licenses. This tool replaces the License Management System (LMS).

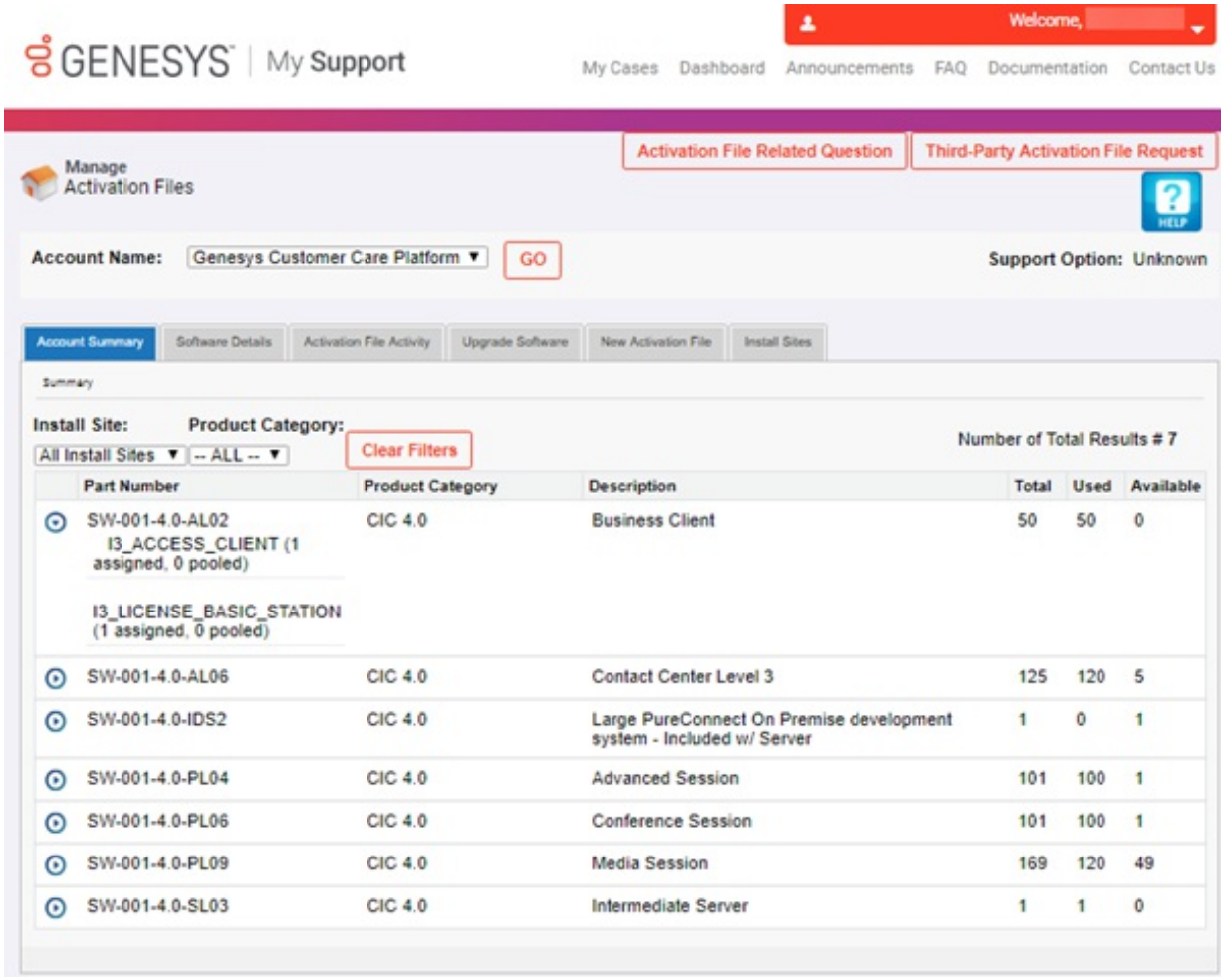
The following table lists what changed and what's new.

LMS	AFMT	Comment
Summary tab	Account Summary tab	
License Activity tab	Activation File Activity tab	
New License tab	New Activation File tab	
N/A	Software Details tab	Provides details about each product.
N/A	Upgrade Software tab	Provides ability to upgrade licenses to a newer version.
N/A	Install Sites tab	Provides ability to manage install sites.
Snapshot tab	N/A	Not migrated to new system. Historical information exists in LMS (at http://license.inin.com/) but not new orders or changes to a customer account that occurred after migration. To see new orders or changes after migration, see the service contract.
CIC and SIP products available in two separate locations.	CIC and SIP products appear together on all tabs.	
Licenses based on anniversary date and required re-registration.	Software licenses are perpetual and have an expiration date of 1/1/2100.	

Activation File Management Tool

The Activation File Management Tool allows you to manage and configure your PureConnect product licenses. It replaces the License Management System for PureConnect products. Customers can access the tool on the My Support Dashboard at https://genesyspartner.force.com/customercare/GenesysCommunityLogin. Partners can access the tool on the Partner portal at https://genesyspartner.force.com/partner/Home. You must have the appropriate credentials to access these portals.

Note: You can also use the Genesys Activation File Request Tool to communicate with the Genesys Licensing Team about licensing related issues or to request an activation file. The tool is available at https://genesys.secure.force.com/activationfile and doesn't require logon credentials.



Activation File Related Question: Opens the **Activation File Related Question** page to allow you to ask a license-related question or request an activation file.

Third-party Activation File Request: Opens the **Third-Party Activation File Request** page to allow you to submit a third-party license request.

Help: Open the *Activation File Management Tool Guide*, which provides an overview of the tool.

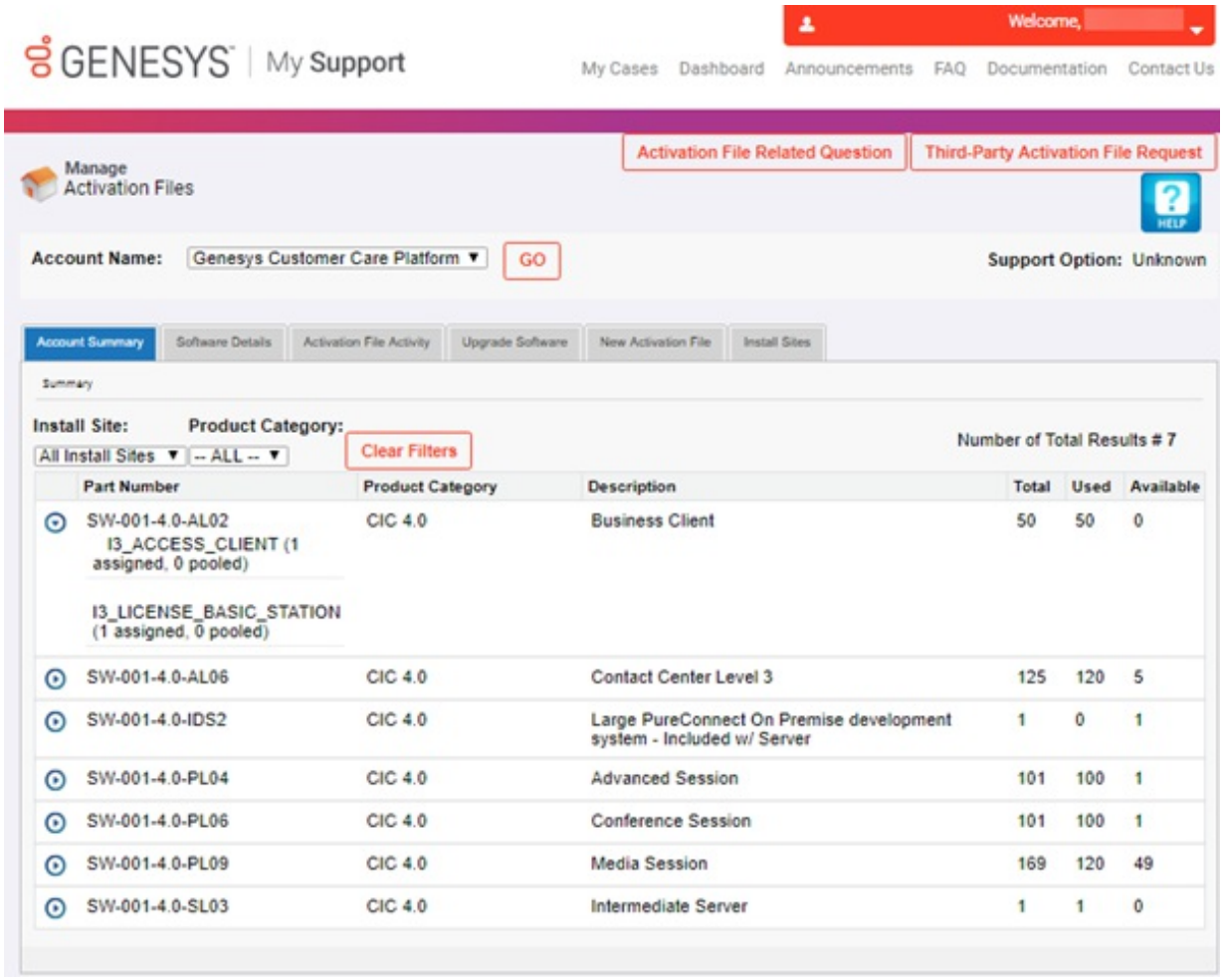
Account Name: Account for which to view licenses.

Tabs

- Account Summary
- Software Details
- Activation File Activity
- Upgrade Software
- New Activation File
- Install Sites

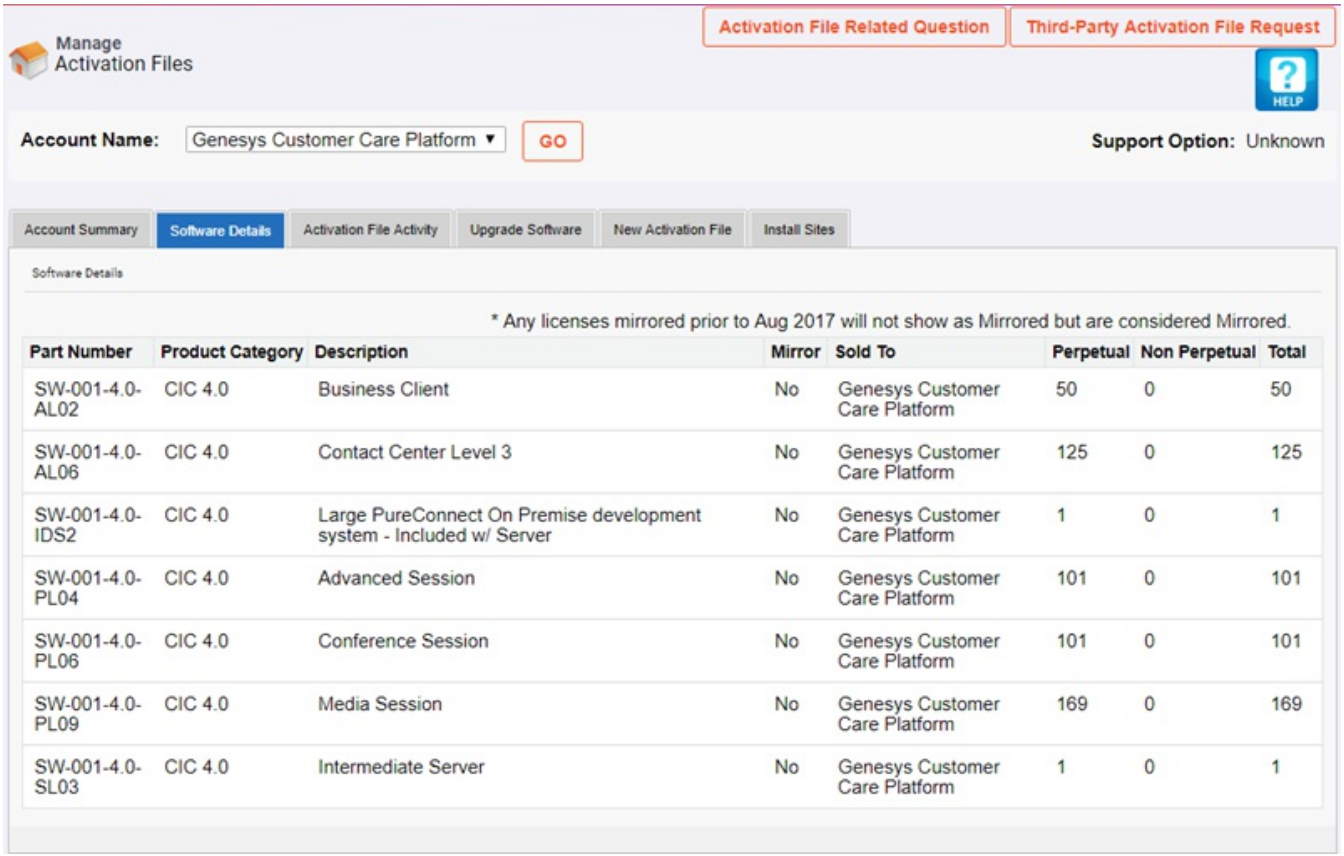
Account Summary

The **Account Summary** tab in the Activation File Management Tool displays all ordered items that are available to license for a specified account. You can generate a license based on any of these items.



Software Details

The **Software Details** tab in the Activation File Management Tool displays an overview of an account's eligibility to create and download an activation file.

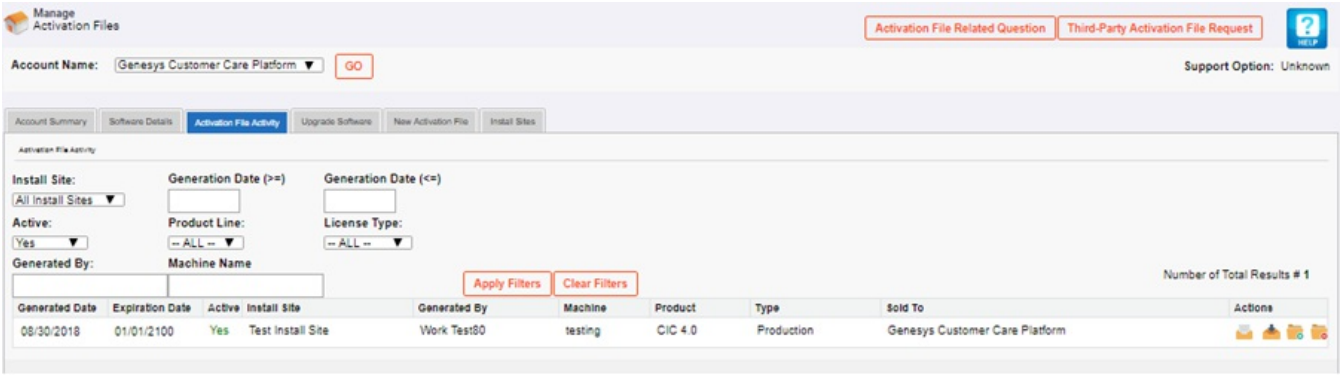


Part Number	Product Category	Description	Mirror	Sold To	Perpetual	Non Perpetual	Total
SW-001-4.0-AL02	CIC 4.0	Business Client	No	Genesys Customer Care Platform	50	0	50
SW-001-4.0-AL06	CIC 4.0	Contact Center Level 3	No	Genesys Customer Care Platform	125	0	125
SW-001-4.0-IDS2	CIC 4.0	Large PureConnect On Premise development system - Included w/ Server	No	Genesys Customer Care Platform	1	0	1
SW-001-4.0-PL04	CIC 4.0	Advanced Session	No	Genesys Customer Care Platform	101	0	101
SW-001-4.0-PL06	CIC 4.0	Conference Session	No	Genesys Customer Care Platform	101	0	101
SW-001-4.0-PL09	CIC 4.0	Media Session	No	Genesys Customer Care Platform	169	0	169
SW-001-4.0-SL03	CIC 4.0	Intermediate Server	No	Genesys Customer Care Platform	1	0	1

Activation File Activity

The **Activation File Activity** tab in the Activation File Management Tool displays a summary of generated files and the actions available for licenses. Options available on the **Activation File Activity** tab include:

- View licenses for an account.
- View license details.
- Download an activation file
- Update a license
- Deactivate a license.



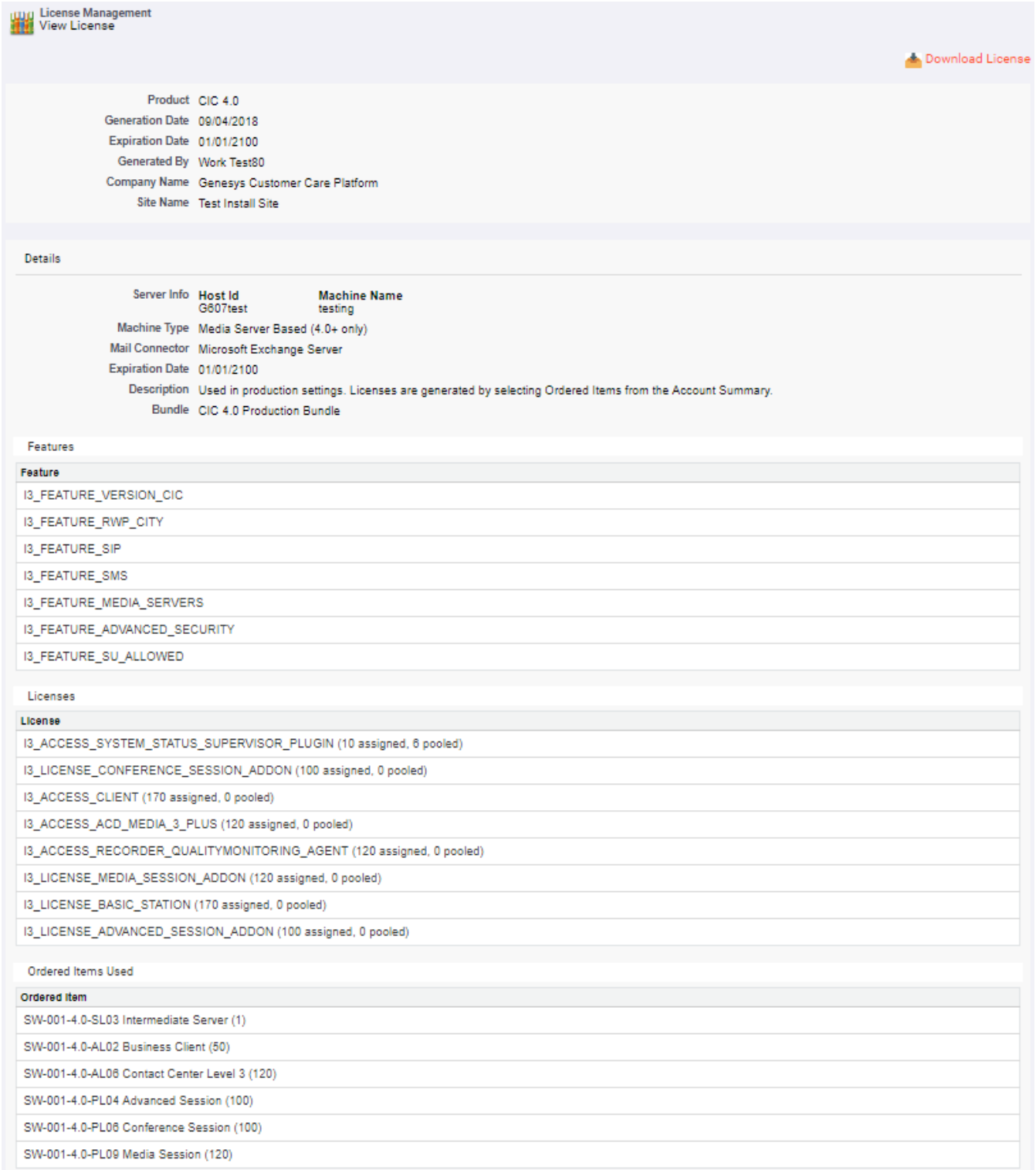
View Licenses for an Account

Use the filtering options on the **Activation File Activity** tab to view active and inactive licenses generated for an account. The following table describes the options available for filtering which licenses to display.

Option	Description
Install Site	Displays licenses for the specified install site only. **All Install Sites** displays licenses for all install sites.
Generation Date (>=)	Displays licenses that you generated on or after the specified date. **[Blank]** displays licenses regardless of generation date, unless you specify a date in the **Generation Date (<=)** box. You can use this option with the **Generation Date (<=)** option to specify a date range.
Generation Date (<=)	Displays licenses that you generated on or before the specified date. **[Blank]** displays licenses regardless of generation date, unless you specify a date in the **Generation Date (>=)** box. You can use this option with the **Generation Date (>=)** option to specify a date range.
Active	**Yes** displays active licenses only. **No** displays inactive licenses only. **All** displays active and inactive licenses.
Product Line	Displays licenses for the specified product line only. **All** displays licenses for all products.
License Type	Displays licenses for the specified license type only. **All** displays licenses for all license types.
Generated By	Displays licenses that the specified person generated only. **[Blank]** displays licenses that anyone generated.
Machine Name	Displays licenses for the specified computer only. **[Blank]** displays licenses for all computers.

View License Details

Use the View icon on the **Activation File Activity** tab to display the **View License** page. This page displays detailed information about a license.



Deactivate a License

Use the Deactivate icon on the **Activation File Activity** tab to deactivate a license. You can deactivate a license:

- If the license generated incorrectly
- To reallocate the license after an organizational change or after adding a server

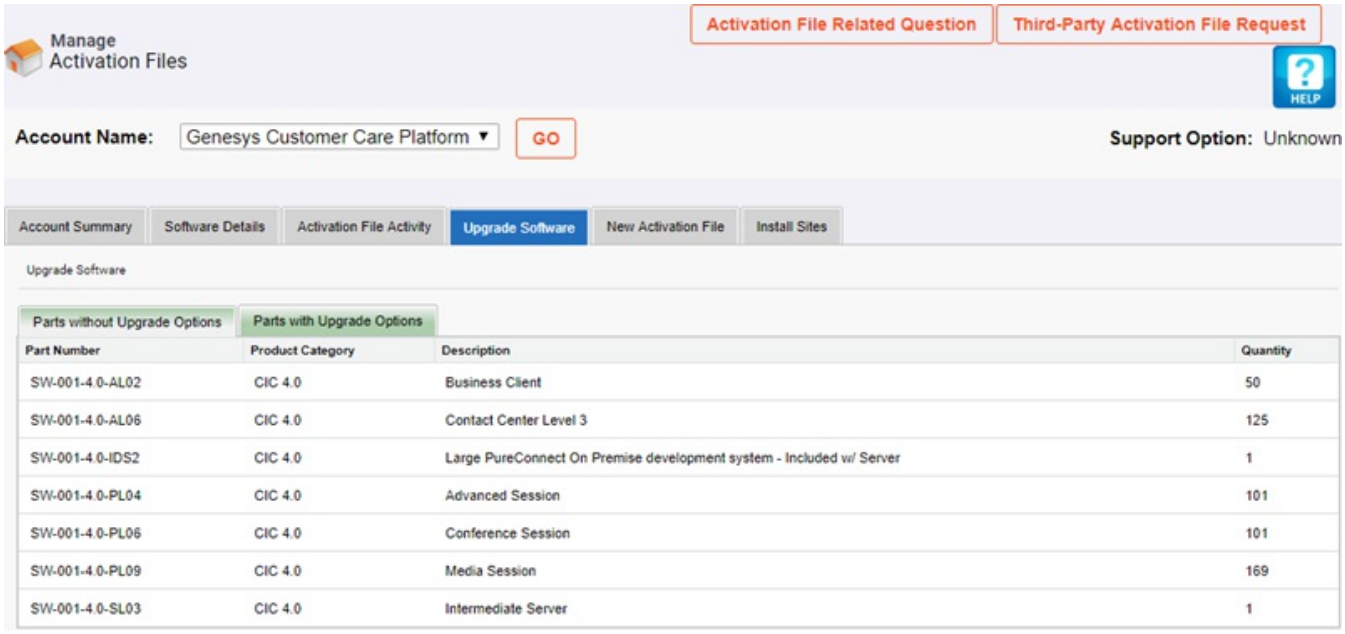
When you deactivate a license, the number of lines and workstations are available again for allocation.

Note: PureConnect pools all licenses. When you allocate licenses, allocate them by site.

Upgrade Software

The **Upgrade Software** tab in the Activation File Management Tool displays products with and without upgrade options.

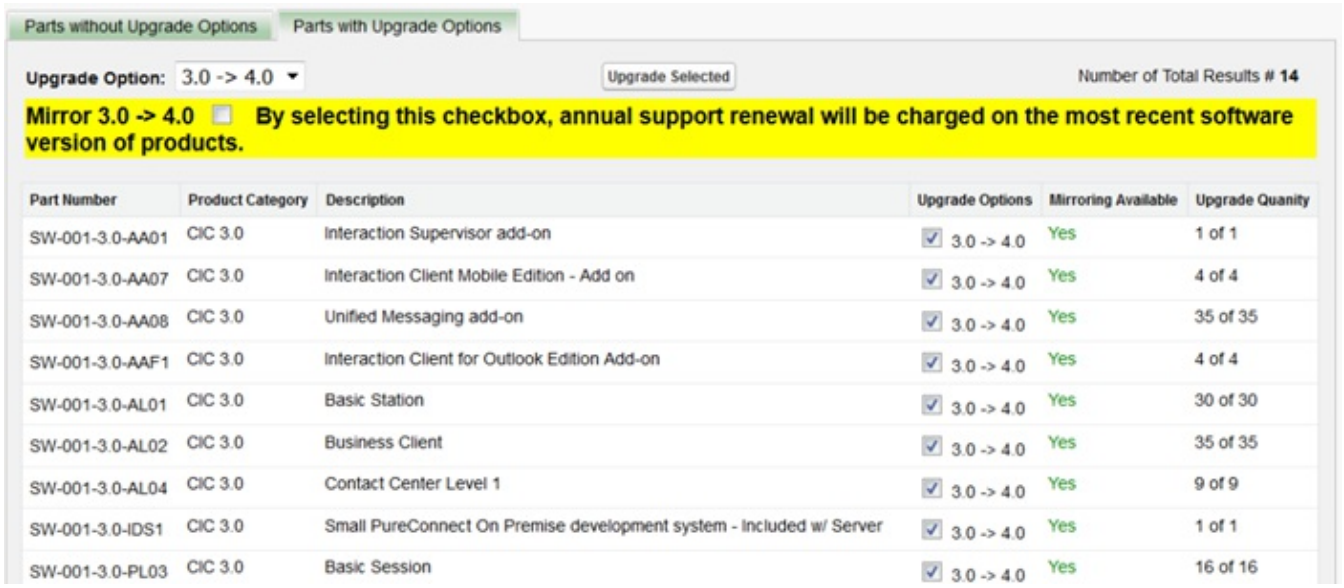
Parts without Upgrade Options tab



Part Number	Product Category	Description	Quantity
SW-001-4.0-AL02	CIC 4.0	Business Client	50
SW-001-4.0-AL06	CIC 4.0	Contact Center Level 3	125
SW-001-4.0-IDS2	CIC 4.0	Large PureConnect On Premise development system - Included w/ Server	1
SW-001-4.0-PL04	CIC 4.0	Advanced Session	101
SW-001-4.0-PL06	CIC 4.0	Conference Session	101
SW-001-4.0-PL09	CIC 4.0	Media Session	169
SW-001-4.0-SL03	CIC 4.0	Intermediate Server	1

Parts with Upgrade Options tab

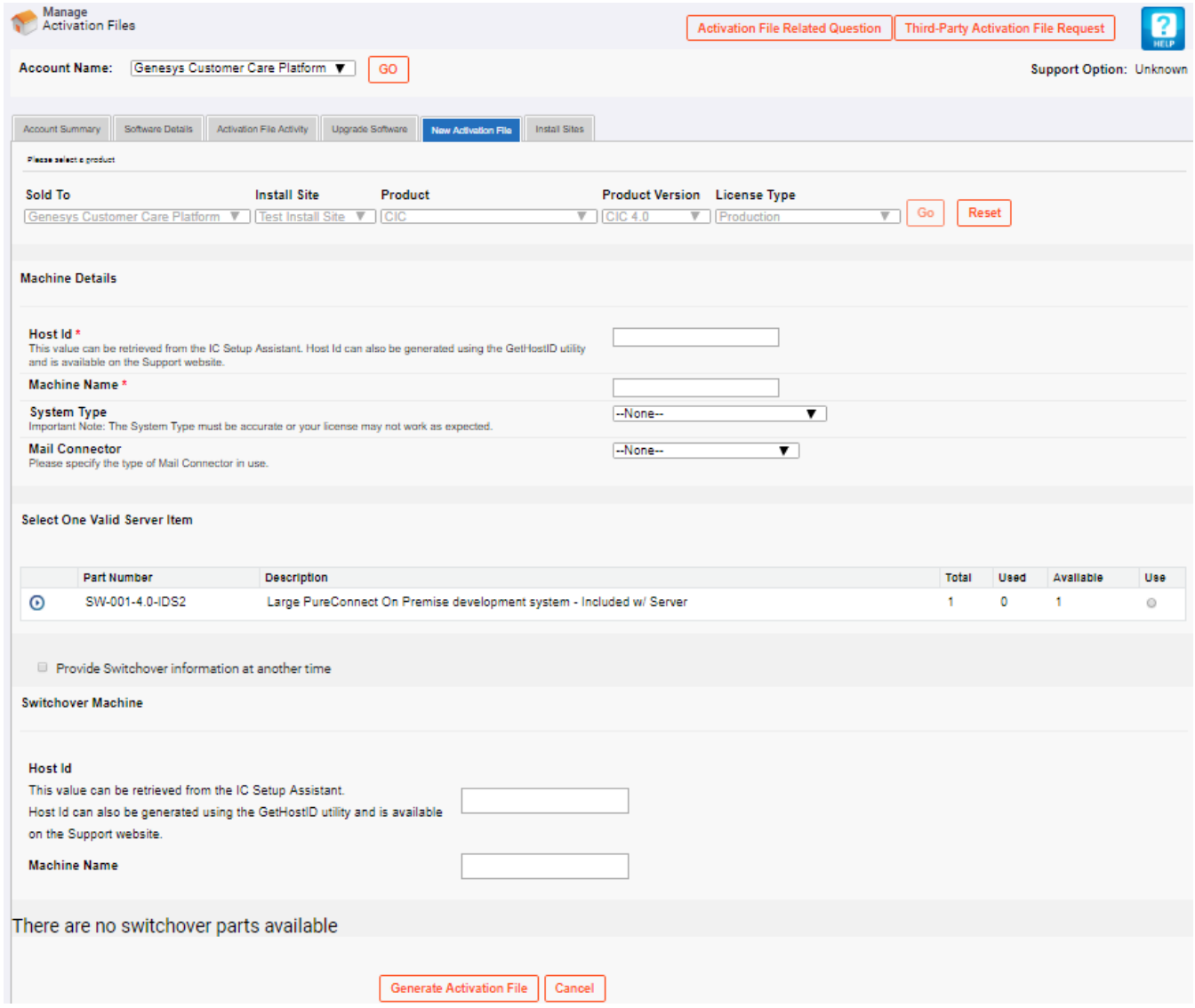
You can select individual products to upgrade. However, if mirroring is available, you must upgrade all products with the upgrade option.



Part Number	Product Category	Description	Upgrade Options	Mirroring Available	Upgrade Quanity
SW-001-3.0-AA01	CIC 3.0	Interaction Supervisor add-on	3.0 -> 4.0	Yes	1 of 1
SW-001-3.0-AA07	CIC 3.0	Interaction Client Mobile Edition - Add on	3.0 -> 4.0	Yes	4 of 4
SW-001-3.0-AA08	CIC 3.0	Unified Messaging add-on	3.0 -> 4.0	Yes	35 of 35
SW-001-3.0-AAF1	CIC 3.0	Interaction Client for Outlook Edition Add-on	3.0 -> 4.0	Yes	4 of 4
SW-001-3.0-AL01	CIC 3.0	Basic Station	3.0 -> 4.0	Yes	30 of 30
SW-001-3.0-AL02	CIC 3.0	Business Client	3.0 -> 4.0	Yes	35 of 35
SW-001-3.0-AL04	CIC 3.0	Contact Center Level 1	3.0 -> 4.0	Yes	9 of 9
SW-001-3.0-IDS1	CIC 3.0	Small PureConnect On Premise development system - Included w/ Server	3.0 -> 4.0	Yes	1 of 1
SW-001-3.0-PL03	CIC 3.0	Basic Session	3.0 -> 4.0	Yes	16 of 16

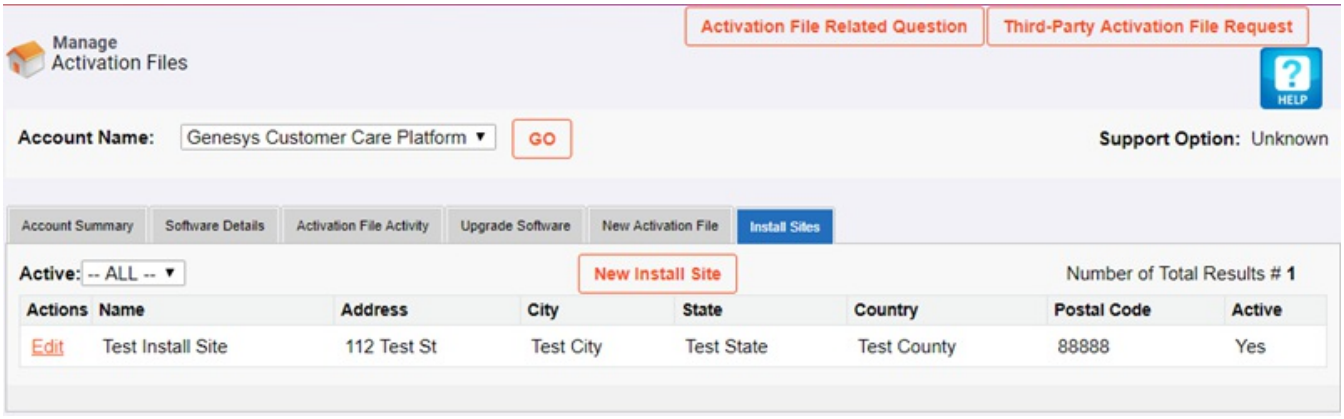
New Activation File

The **New Activation File** tab in the Activation File Management Tool allows you to generate a new activation file. Trial bundle licenses and add-on bundle licenses are not available in the Activation File Management Tool.

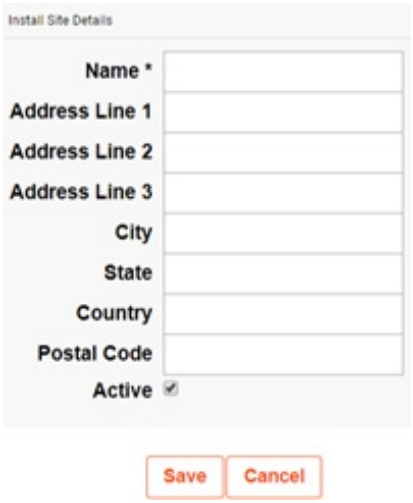


Install Sites

The **Install Sites** tab in the Activation File Management Tool allows you to view, edit, create, and deactivate install sites.



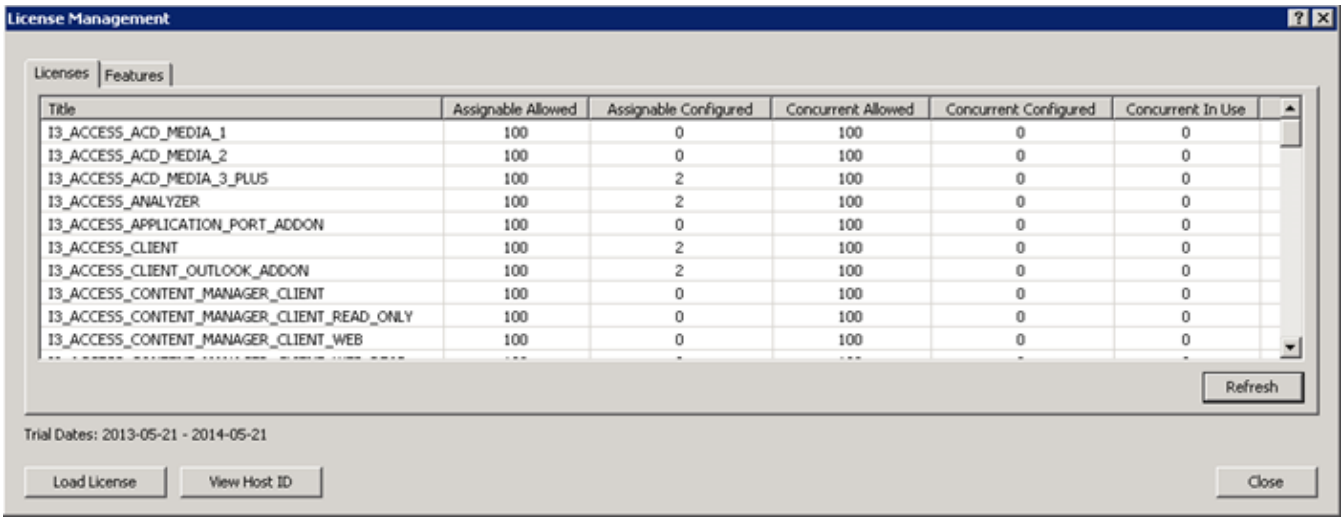
New Install Site: Opens the **Install Site Details** dialog box to allow you to create an install site.



Edit: Opens the **Install Site Details** dialog box in edit mode to allow you to modify an install site. To deactivate an install site, clear the **Active** check box

License Management in Interaction Administrator

In Interaction Administrator, you can view and allocate your available licenses. To add a feature, allocate the appropriate license. You do not have to interrupt service or restart the system, which means that you do not need to schedule downtime to add features. For more information, see the *Interaction Administrator Help* at https://help.genesys.com/cic/mergedProjects/wh_ia/desktop/interaction_administrator_help.htm.



License Overview

License Types

The following table describes the available types of licenses.

License Type	Description
Engine	License that controls the amount of system resource used to deliver a specific system capability.
Feature	License applied to a server or the system as a whole that enables a capability.
Hardware	License for hardware to support customer systems including servers, gateways, phones, headsets, and related components.
Session	License that allows a connection with the system for a specific purpose. Concurrent sessions control the maximum number of connections that can occur at one time. Time-based sessions control the maximum number of connections that can occur during a specific time interval. Only Interaction Mobilizer licenses are time-based. All other session licenses are of the concurrent type.
Station	License that allows a physical or virtual endpoint to connect with the system and use some set of capabilities.
Access	License assigned to either a user or a station that allows the user or station to use a specific set of capabilities of the system. A standard access license is consumed when assigned to the user or station and released when removed from the user or station. A concurrent access license is consumed when the user logs into the system and released when the user logs out of the system.
Education	License for instructional courses that are instructor-led, role-based, e-learning, or certification/re-certification related.
Documentation	License for documentation resources to guide users or serve as a reference for the configuration or use of system capabilities.
Services	License for services as provided and identified with a Statement of Work (SOW) referencing the licensing agreement and executed by the parties.
Tenant	License that allows subdivision of a system capability into smaller groups or partitions and then assignment as appropriate. Only certain Interaction Web Portal licenses are of this type.
Development	License or bundle of licenses that allows the creation of a development or test environment. You cannot use this license type in a production environment.
Disaster Recovery	License used as part of a Disaster Recovery (DR) System. You can only purchase a DR license as part of or after the purchase of the related production license. The number of licenses purchased for a DR system should not exceed the total number of related production licenses purchased.
Third-party Software or Service	License for software or a service offering from a third party.

New and Discontinued Licenses

For more information about new and discontinued licenses, see *CIC 4.0 License Upgrade Guide* on the Product Information site at https://my.inin.com/products/cic/Pages/Marketing-Collateral.aspx.

Virtualized Interaction Media Server

Genesys supports many components of CIC as virtual machines on a hypervisor host. However, Genesys does not advocate or support usage of Interaction Media Server as a virtual machine in a production environment. The reason is the importance of processing real-time communications, and the variability of performance and capabilities introduced with hypervisors.

You can install Interaction Media Server as virtual machines in hypervisors using the Software-Only license. However, if you encounter problems, Genesys does not provide technical support for virtual Interaction Media Servers.

For more information, see the *CIC Virtualization Technical Reference* at https://help.genesys.com/cic/mergedProjects/wh_tr/desktop/pdfs/virtualization_tr.pdf.

License Allocation Methods

There are two license allocation methods in CIC: Assignable and Concurrent. For a single system, you can allocate both Assigned and Concurrent licenses. However, you must allocate all licenses for a specific user as either Assigned or Concurrent.

Assignable License Allocation Method

The Assignable license method allows you to allocate licenses to users or stations.

Note: You can only allocate the Basic Station license to stations.

Rules for Assignable licenses

- When you allocate an assignable license to a user, the user immediately acquires the license, independent of whether the user is logged on. If the user logs on to another computer, the system logs off the user from the previous computer. Removing the license from the user or deleting the user releases the acquired Assignable license.
- When you allocate an assignable license to a station, the station immediately acquires the license, independent of whether a user is logged on to that station. Removing the license from the station or deleting the station releases the acquired Assignable license.
- You can only configure licenses for stations as Assignable.

Concurrent License Allocation Method

The Concurrent license allocation method allows you to allocate licenses to users only. It is based on the number of simultaneous users accessing a feature or function.

In the Concurrent license model, you still configure the license in Interaction Administrative. However, the system doesn't allocate the license until the user logs on to an application. CIC maintains a list of users, a list of licenses available, and a list of licenses in use.

Concurrent license allocation benefits

- Flexibility and easier administration.
- Automatic reallocation of licenses based on shift changes.
- Reduction in license counts and management.

Note: With a Concurrent license, the system allocates all of the licenses for a user when the corresponding product modules load. For example, suppose that a user has three licenses: Recorder, Supervisor, and Optimizer. When the use opens the **Optimizer** module, the system allocates all three licenses for the user even though the user is opening only one of the modules.

Rules for Concurrent licenses

- A user who logs on to a client application with a license configured as Concurrent acquires a Concurrent license. When the user logs off, the system releases the acquired Concurrent license. If the user logs on to another computer, the system logs off the user from the previous computer.
- If a user acquires a license and any application on any computer reacquires that license for that same user, the system uses the license acquired previously. The license count doesn't increase.
- You cannot configure licenses for stations as Concurrent.

Server License Types

PureConnect uses Server license types that indicate whether a server is a production server or another type of server. The license type also dictates expiration behavior, production behavior, or system re-registration behavior. The following table describes the available server license types.

License Type	Description
e-FAQ Production	Provides an e-FAQ only production license.
Evaluation	Used for evaluation purposes, which are small configurations that you purchase. You cannot add other components to the pre-defined configuration for this license.
Media Server	Provides a Media Server license.
Multi-site Administration	Multi-site Administration licenses used in production environments. Requires re-registration after one year.
Non-ordered Development	Genesys includes a **small** non-ordered development license at no cost when ordering a Basic or Intermediate Production Server. A small non-ordered development license includes all Feature Licenses; and Access and Sessions licenses (8 of each). Interactions disconnect hourly. Genesys includes a **large** non-ordered development license at no cost when ordering an Advanced Production Server. A large non-ordered development license includes all Feature licenses; and Access and Sessions licenses (30 of each). You generate and download the license using the Activation File Management Tool. Interactions disconnect hourly.
Ordered Development	If customers require another server for development purposes, they can order a **small** or **large** ordered development license. This license is active for one year. Interactions disconnect hourly. • A **small** ordered development license includes all Feature Licenses; and Access and Sessions licenses (8 of each). • A **large** ordered development license includes all Feature Licenses; and Access and Sessions licenses (30 of each).
Production	Used in a production environment to allow the usage of all purchased features. Production licensed servers request re-registration after one year.
Switchover	Used in a production environment on a backup system. Switchover licensed servers request re-registration after one year. **Note:** Production licenses include information for both IC servers in a switchover pair. You can apply this single license file to both computers.
Trial	Used for trial purposes. It expires after 60 days. You can add components to the license.
Trial System	Allows existing customers to deploy into production as a trial, product that they do not own.

Other licenses such as disaster recovery, load test, and training licenses are also available.

Access Licenses

PureConnect provides expanded flexibility in how you apply features to stations and users. Access licenses are accessible from a user license (Assigned or Concurrent) or from a station license. For example, if there are multiple shifts at a site, you can use station licenses. Alternately, if you have users such as sales or business managers who move around from place to place, you can use user licenses.

You can allocate Access licenses to stations in a new installation when running IC Setup Assistant during station configuration, using the **Add Stations Assistant in the Station Licenses** dialog box.

You can also allocate Access licenses during post-installation in Interaction Administrator. For more information, see:

- Allocate Licenses When Adding a Station
- Allocate Licenses When Modifying a Station
- Allocate Licenses to Stations Through the Licenses Allocation Container

All workstations and configured remote stations must have a Basic Station license allocated to activate station audio. If you save an enabled station configuration that does not have the Basic Station license allocated, a message appears. The message indicates that you need a Basic Station license to activate the station.

Use Interaction Administrator to allocate Access licenses to a user after IC server installation.

> **Note:** We recommend allocating Access licenses to both stations and users at the same time, so that you can balance the threshold of the license using the **License Allocation** container. For more information about the **License Allocation** container, see License allocation in Interaction Administrator.

Access Key for Installing Updates

While you are paying maintenance, you can use the `I3_FEATURE_SU_ALLOWED` access key to install updates.

Access Licenses Types

Basic Station License (station only)

The Basic Station license enables station audio for a phone device or for the SIP Soft Phone on a client workstation. All active stations require a Basic Station license. Without one, the station does not have a dial tone or audio.

> **Note:** You can use a non-audio station (for example, fax machine) for non-audio interactions.

- Allocate a Basic Station license to Workstations, Managed Workstations, Stand-alone Fax, Stand-alone Phone, and Remote stations.
- Allocate a Basic Station license to Remote stations. For Dynamic Remote stations, where you provide just a phone number, CIC allocates a Basic Station license if any are available.
- You cannot configure a Basic Station license as Concurrent.
- You cannot allocate a Basic Station license to users.

For more information, see Basic station license allocation.

Client Access License (user or station)

The Client Access license enables the client functionality of the CIC client. You license the features by user, station, or both. Without this license allocation, the CIC client cannot run on the station. If a user logs on to a remote station, that station also must acquire a Client Access license. If a user logs on to a dynamic remote station—uses a remote phone number to log on to a CIC client—the user doesn't need a Client Access license.

ACD Access License (user or station)

You license ACD features by user, station, or both. Without this license allocation, ACD is not active on the station.

The ACD features are:

- Media 1, allows for one interaction type.
- Media 2, allows for two interaction types.
- Media 3, allows for multiple interaction types.

The interaction types include Call/Callback, Chat, Email, and Generic.

Interaction Process Automation License (user or station)

This license allows Interaction Process Automation (IPA) access. There are four IPA license types:

- Direct Routed Work Items
- Group Routed Work Items
- Process Monitor (user license only)
- Process Designer (user license only)

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

Add-on and Module Access Licenses (user or station)

You can purchase add-on and module licenses as a package or individually to expand system features and functionality. The following table describes the available add-on and module licenses.

License	Description
Interaction Analyzer Access	Allows real-time word/phrase spotting on CIC calls recorded with Interaction Recorder. Requires the Interaction Analyzer Real Time Server, Interaction Recorder Server, and Interaction Recorder add-on access licenses.
Interaction Client Operator Add-On	Allows using operator add-on features in CIC.
Interaction Client Outlook Add-In	Allows using Outlook add-on features in CIC.
Interaction Dialer Add-On	Allows a user to take calls managed by Interaction Dialer.
Interaction Feedback Access	Allows a user to have a survey applied to an interaction in which they were a participant or to open the Interaction Feedback module in IC Business Manager.
Interaction Optimizer Access Real-time Adherence	Provides access for viewing real-time adherence events in multiple applications. For example, IC Business Manager, Interaction Desktop, and Interaction Supervisor.
Interaction Optimizer Client Access	Provides access for viewing individual schedules and submitting time-off request in Interaction Desktop.
Interaction Optimizer Real-time Adherence Tracking	Allows calculating and logging real-time adherence and actual schedule worked for a user.
Interaction Optimizer Schedulable	Allows scheduling of an agent.
Interaction Quality Manager	Allows users to create questionnaires (quality evaluations), score Interaction Recorder's recorded interactions, and search for completed scorecards in IC Business Manager.
Interaction Recorder Access	Allows recording a user. Without this license, recordings are encumbered. To access an encumbered recording, acquire a code from PureConnect Customer Care. For more information, see KB article: *How to Handle Encumbered Recordings* at https://my.inin.com/Products/Pages/KB-Details.aspx?EntryID=Q134797603600605.
Interaction Recorder Client Access	Allows users to search for and play back recorded interactions in the Interaction Recorder module of IC Business Manager.
Interaction Recorder Extreme Query	Provides access to Interaction Recorder Extreme Query Client so that a user can search and play back recorded calls; and view Graph Data of search results.
Interaction Scripter	Provides access to Interaction Scripter.
Interaction Supervisor iPad Edition	Provides access to Interaction Supervisor iPad Edition.
Interaction Supervisor Plug-in: Historical Reporting	Provides access to Historical Reporting in IC Business Manager.
Interaction Supervisor Plug-In: Interaction Dialer	Provides access to Dialer views in IC Business Manager.
Interaction Supervisor Plug-In: Reporting Assistant	Provides access to Interaction Reporter in IC Business Manager.
Interaction Supervisor Plug-In: System Status	Provides access to the System Status views in IC Business Manager. For example, Call Activity, License Statistics, Queues, Session Manager, System Graph, and System Statistics.
Interaction Supervisor Plug-In: Workgroup	Provides access to Agents and Workgroups views in IC Business Manager. For example, Agent Details, Agent Graph, Agent or Workgroup Queue, Agent Overview, Workgroup Details, Workgroup Directory, Workgroup Graph, Workgroup Overview, and Workgroup Statistics.
Interaction Tracker Access	Provides access to Tracker menu in CIC.
Salesforce Business User	Provides access to Salesforce as a business user.
Salesforce Standard User	Provides access to Salesforce as a standard user.

CIC Client Licensing

CIC client licensing affects the way a user accesses a client workstation.

- A CIC client user can only log on to one station on one computer at a time.
- To run the CIC client on a workstation:
  - The station the user logs on to must have a Basic Station license allocated and available.
  - Either the user or the station must have a Client Access license or ACD Access license allocated and available.
- When a user logs on to a specified station, that user exclusively acquires all the licenses available to that station while the user is logged on to the station. When the user logs off, those licenses become available for the next user who logs on to that station.
- A user can log on through a Dynamic Remote station using a remote phone number to log on to the CIC client. However, if the system reaches the Basic Station license threshold, it's possible that the station isn't available immediately. Although there's no station associated to the user in this situation, the system attempts to acquire a Basic Station license for the Dynamic Remote station. Therefore, this logon affects the Basic Station license usage count.

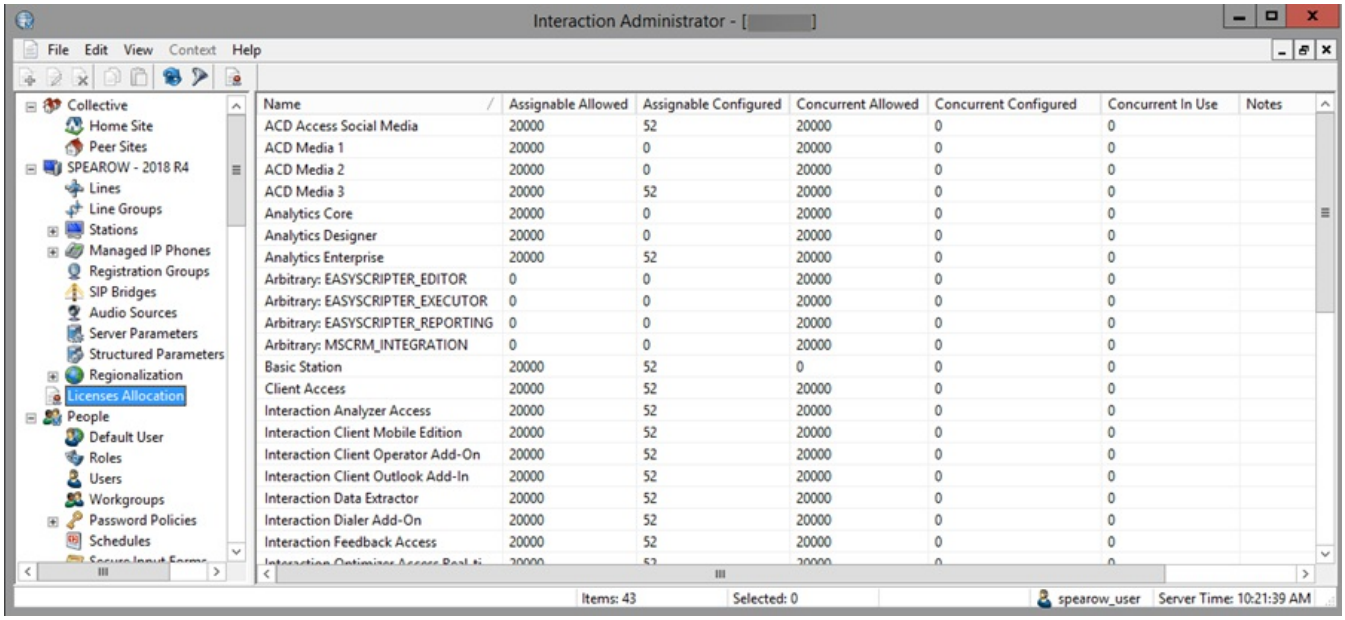
Access License Key Examples

The following table provides examples of keys in the license file that apply to a user or station.

Access Licenses				
4.0 Part Number	**Number of Assigned Licenses**	**Number of Pooled Licenses**	**Description**	**4.0 Key**
SW-001- 4.0-AL01	0	25	Basic Station	I3_LICENSE_BASIC_STATION (1)
SW-001- 4.0-AL02	5	0	Business Client	I3_LICENSE_BASIC_STATION (1) I3_ACCESS_CLIENT (1)
SW-001- 4.0-AL03	5	25	Phone-only Call Center	I3_LICENSE_BASIC_STATION (1) I3_ACCESS_ACD_MEDIA_1 (1)
SW-001- 4.0-AL04	5	25	Contact Center Level 1	I3_LICENSE_BASIC_STATION (1) I3_ACCESS_CLIENT (1) I3_ACCESS_ACD_MEDIA_1 (1)
Access Add-on Licenses				
4.0 Part Number	**Number of Assigned Licenses**	**Number of Pooled Licenses**	**Description**	**4.0 Key**
SW-001- 4.0-AA01	2	0	Interaction Supervisor Add-on	I3_ACCESS_DIALER_SUPERVISOR_PLUGIN (1) I3_ACCESS_WORKGROUP_SUPERVISOR_PLUGIN (1) I3_ACCESS_HISTORICAL_REPORT_SUPERVISOR_PLUGIN (1)
SW-001- 4.0-AA02	1	1	Interaction Scripter Add-on	I3_ACCESS_INTERACTION_SCRIPTER_ADDON (1)
SW-001- 4.0-AA17	2	2	Interaction Report Assistant	I3_ACCESS_REPORT_ASSISTANT_SUPERVISOR_PLUGIN (1)

License Allocation in Interaction Administrator

In Interaction Administrator, you can access the **Licenses Allocation** container to view Access license information and allocate Access licenses to users and stations. Allocation of Basic Station licenses differs somewhat from allocation of all other Access Licenses.



Name: Name of the license.

Assignable Allowed: Number of Assignable licenses purchased.

Assignable Configured: Number of Assignable licenses assigned to users or stations.

Concurrent Allowed: Number of Concurrent licenses purchased.

Concurrent Configured: Number of Concurrent licenses assigned to users.

Concurrent In Use: Number of Concurrent licenses currently in use.

Notes: Message that displays when the count exceeds the number of licenses available.

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

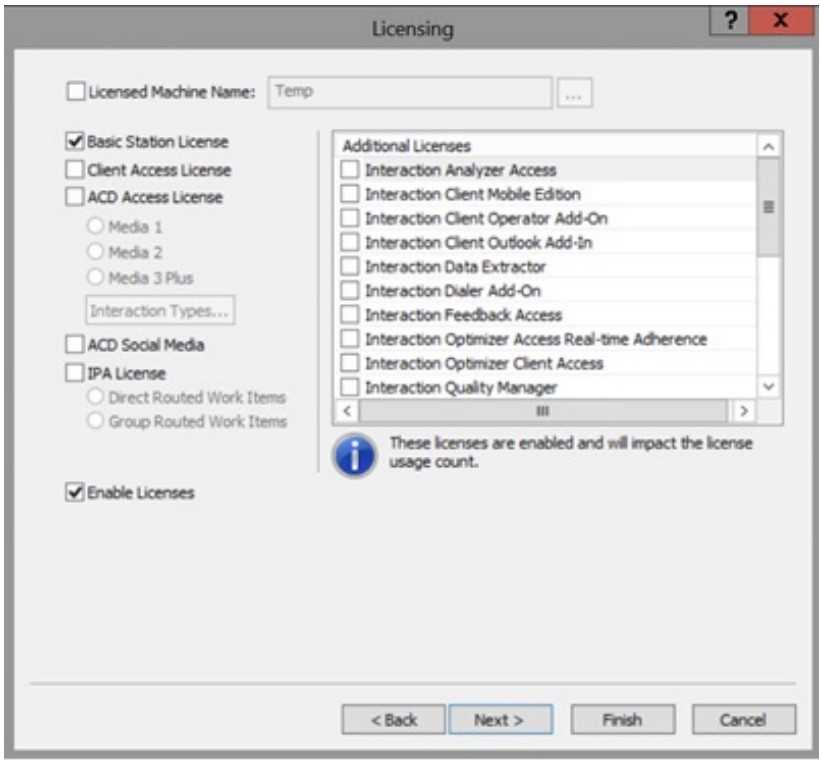
Basic Station License Allocation

You can allocate Basic Station licenses to stations:

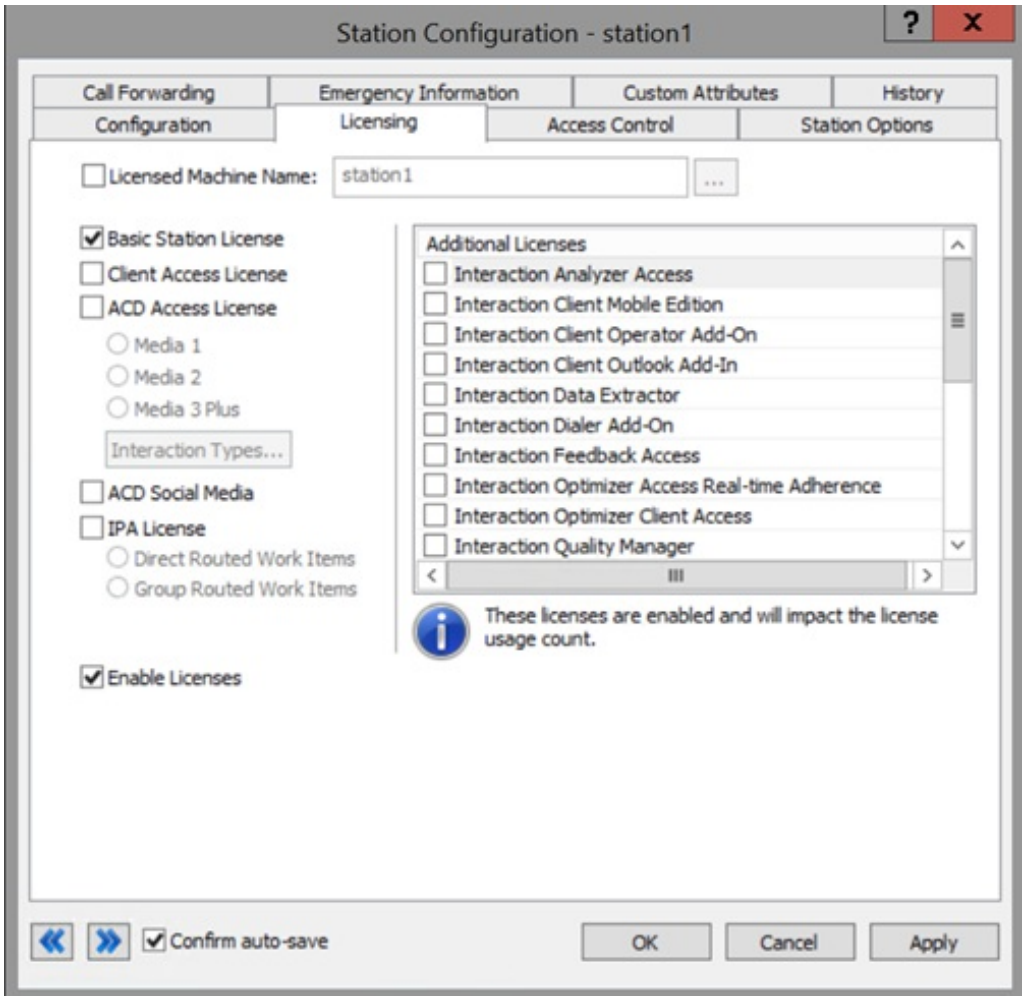
- During a new installation when running IC Setup Assistant.

  > **Tip:** Genesys recommends that you allocate the Basic Station license during a new installation.

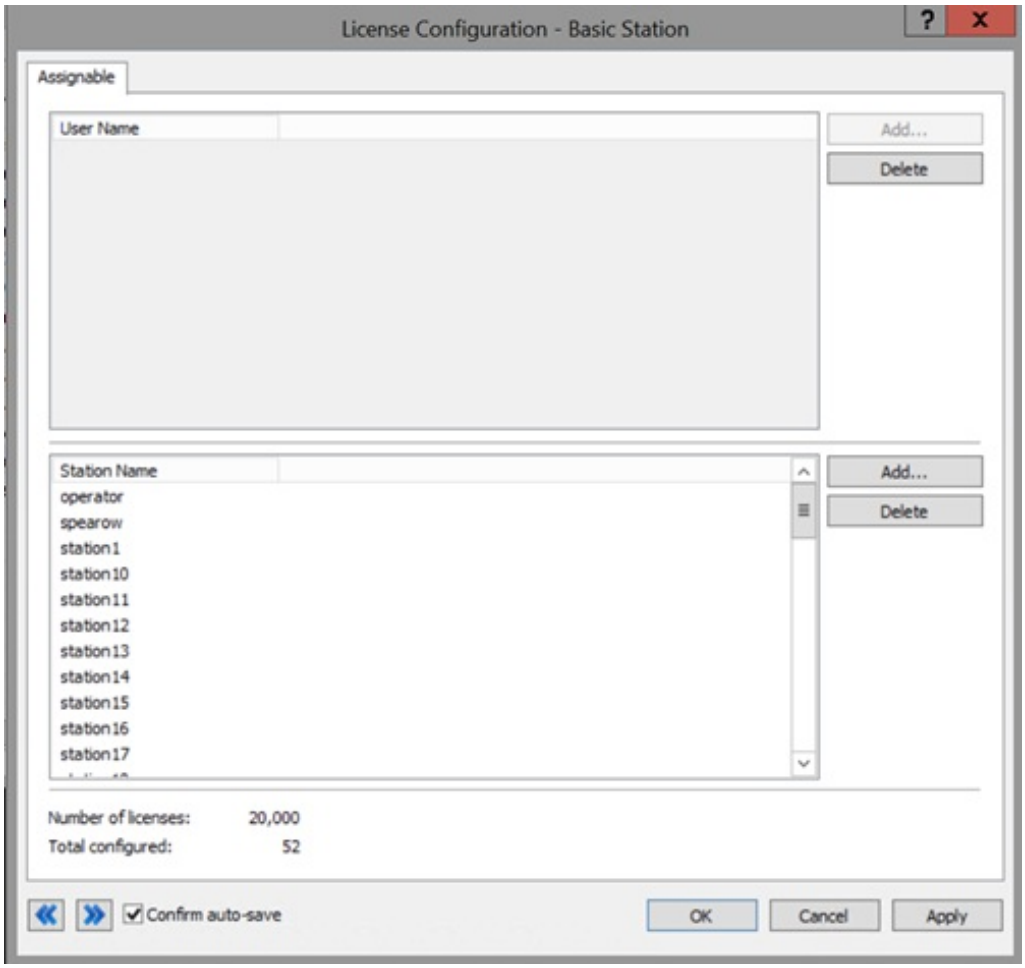
- After installation in Interaction Administrator, when adding a station through the **Stations** container.



- After installation in Interaction Administrator when modifying a station through the **Stations** container.

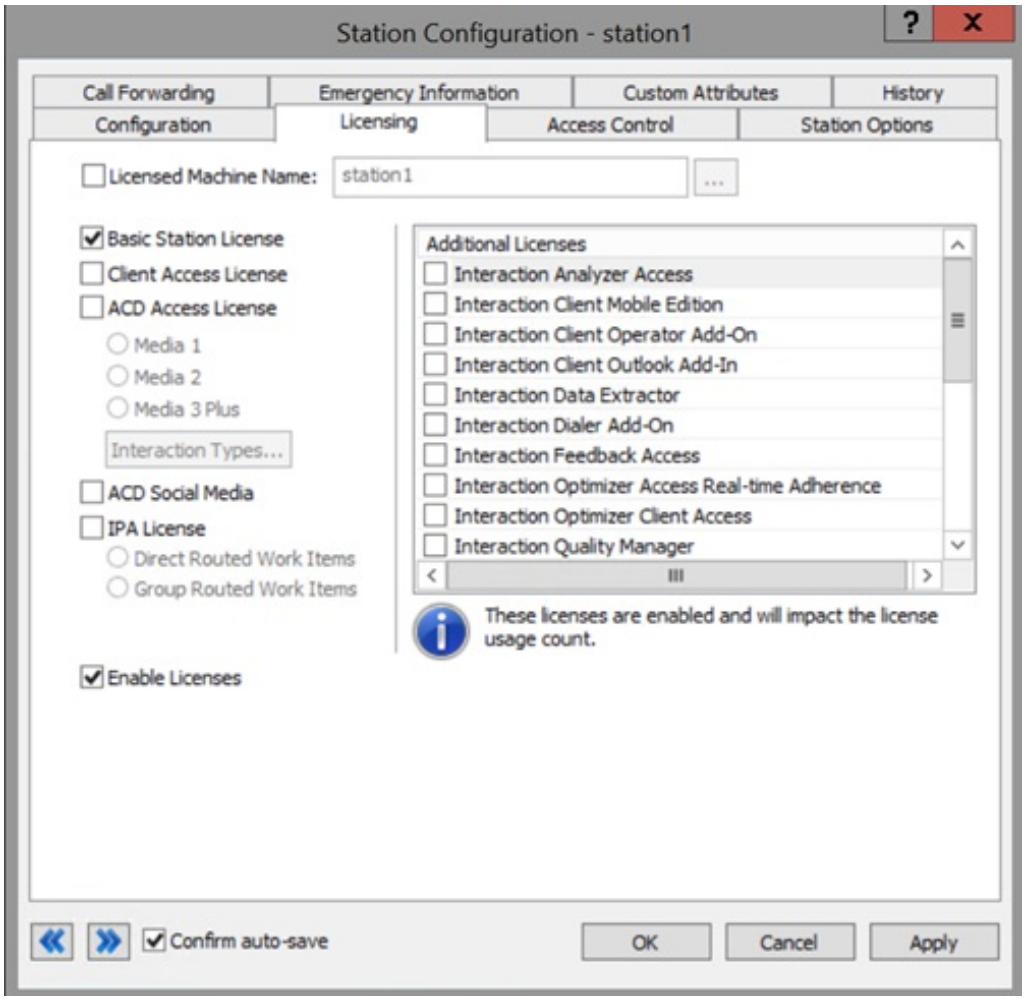


- After installation in Interaction Administrator in the **License Configuration** dialog box when allocating licenses through the **Licenses Allocation** container.



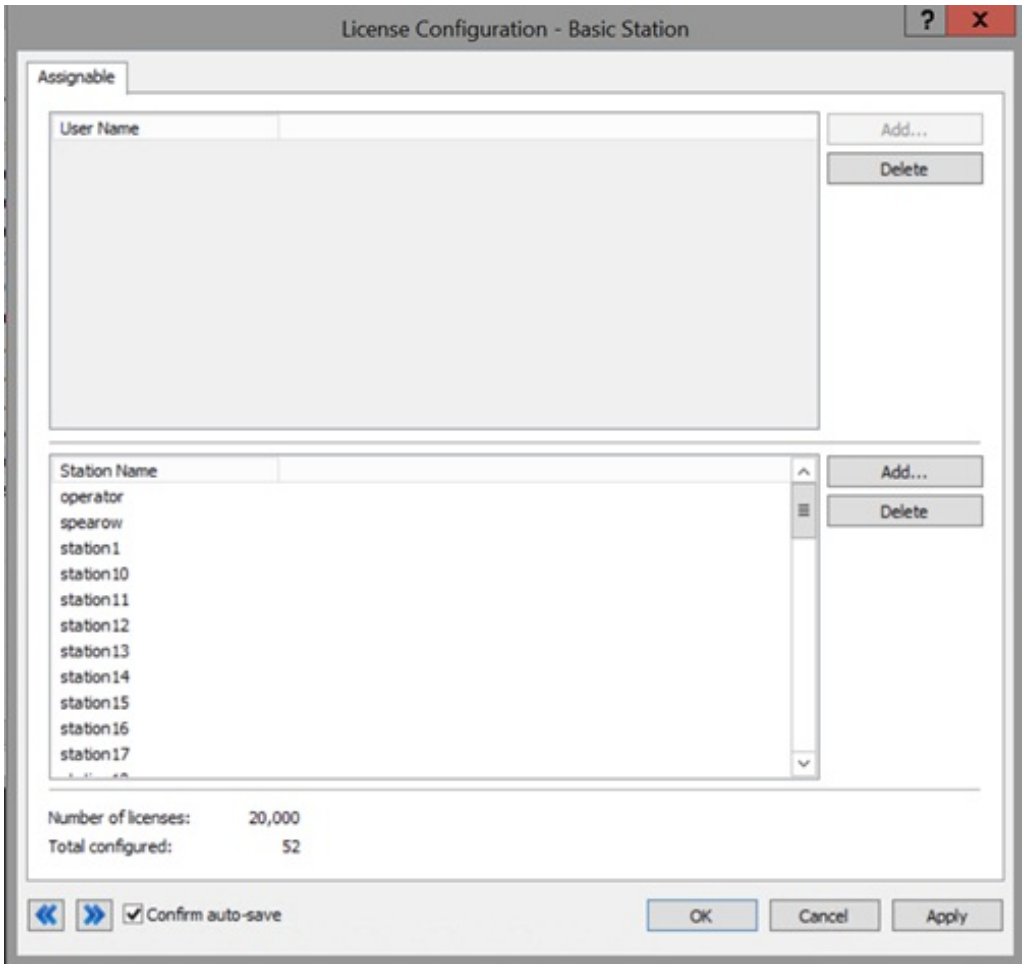
Single Station Allocation

You can allocate the Basic Station license one station at a time through the **Station** container. For example, in the right pane of the **Stations** container, double-click the station name to display the **Station Configuration** dialog box. Click the **Licensing** tab, select the **Basic Station License** check box, and then click **OK**.



Multiple Station Allocation

You can allocate the Basic Station license to multiple stations at once through the **License Allocation** container. For example, in the right pane of the **Licenses Allocation** container, double-click **Basic Station** to display the **License Configuration – Basic Station** dialog box. To allocate the Basic Station license to multiple stations, add the stations to the list box.



Post-installation Testing

For post-installation verification testing, allocate a Basic Station license to a station used to test outbound and inbound calls. For example, calls on a CIC client phone and calls on a client workstation.

Post-migration Verification

The CIC 2.4/3.0 to CIC 2015 R1 or later migration package contains the tools and documentation to guide you through the process of migrating existing CIC 2.4/3.0 systems to CIC 2015 R1 or later. See the CIC 2.4/3.0 to CIC 2015 R1 and later migration package page on the Product Information site at https://my.inin.com/products/cic/Pages/Migrations.aspx to download the latest versions of the migration tools and documentation. In a CIC migration, the IC server might attempt to allocate a Basic Station license to existing stations. We recommend that you review the Basic Station license allocation in Interaction Administrator after migration and adjust it as needed.

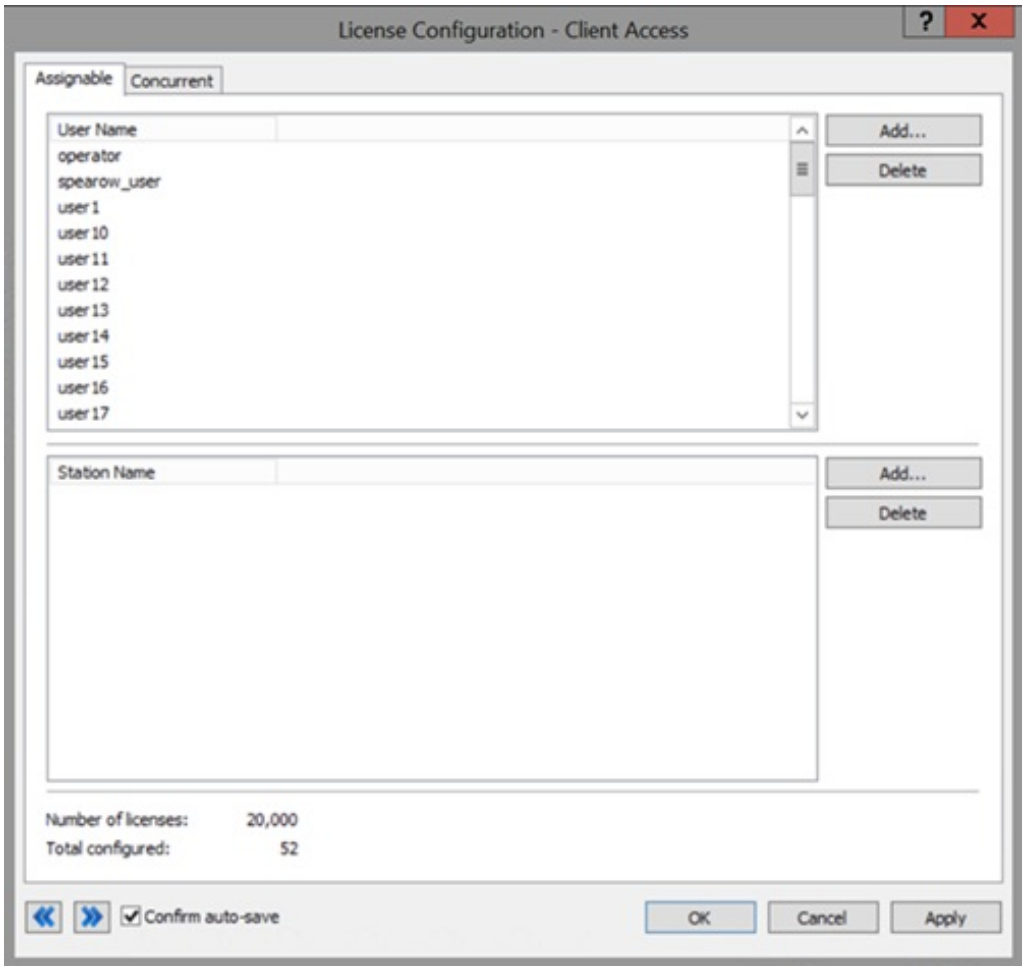
Access License Allocation

You can allocate Access licenses to a user or station on the **License Configuration** dialog box in the **Licenses Allocation** container. You can configure the licenses as either Assignable or Concurrent.

- In the right pane of the **Licenses Allocation** container, double-click **Client Access** to display the **Assignable** tab of the **License Configuration – Client Access** dialog box.

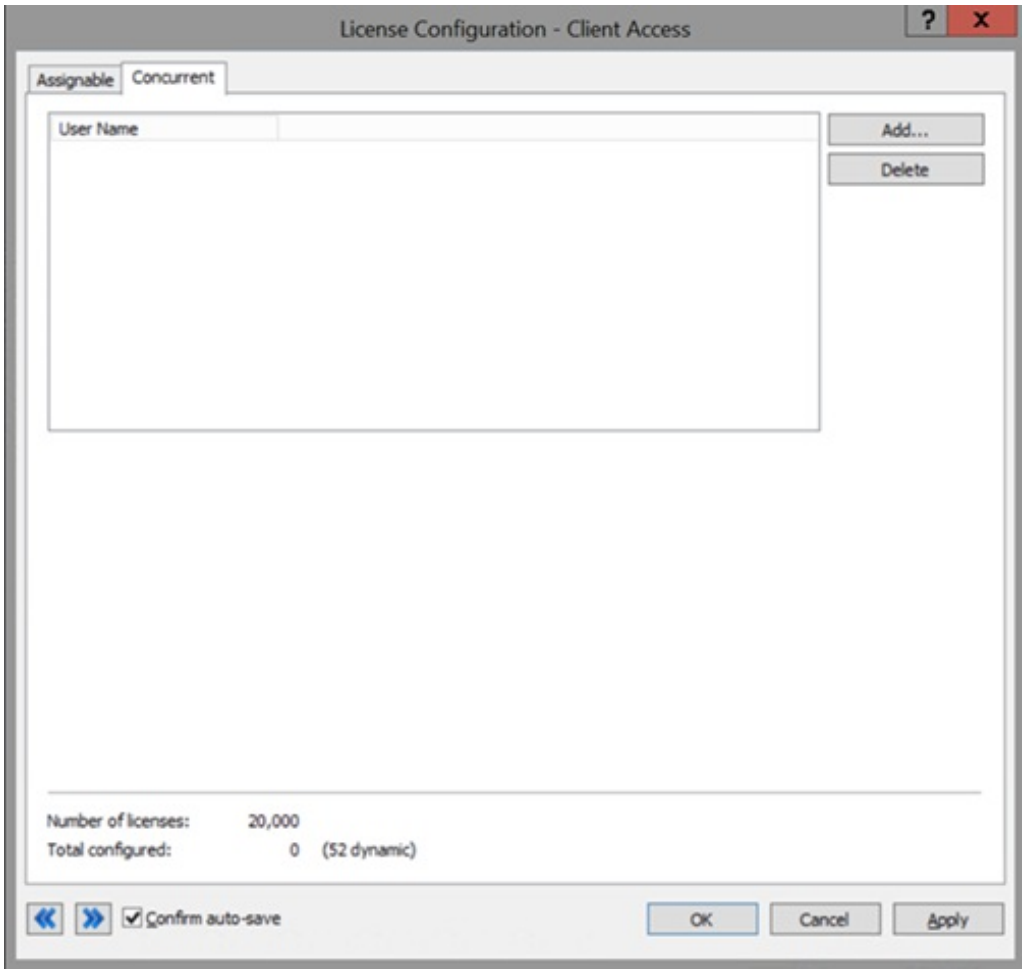
Assignable tab

Use the **Assignable** tab to view and modify the users and stations allocated to the license and configured as Assignable. You can also view the number of Assignable licenses and the number of licenses configured as Assignable.



Concurrent tab

Use the **Concurrent** tab to view and modify the users allocated to the license and configured as Concurrent, the number of licenses that are Concurrent, and the number of licenses configured as Concurrent.



You can add and delete users, workgroups, and stations allocated to the license as needed, while keeping within the License Threshold. This dialog box is especially useful when allocating an Access license because of the overview it provides of users, workgroups, and stations at the same time. Access to this information can save you time when determining availability of licenses for new staff or departmental changes, and in setting up newly purchased licenses to configure. If you have large quantities of items such as the CIC clients, or ACD and media level, you can grant the license to a user, workgroup, or station quickly.

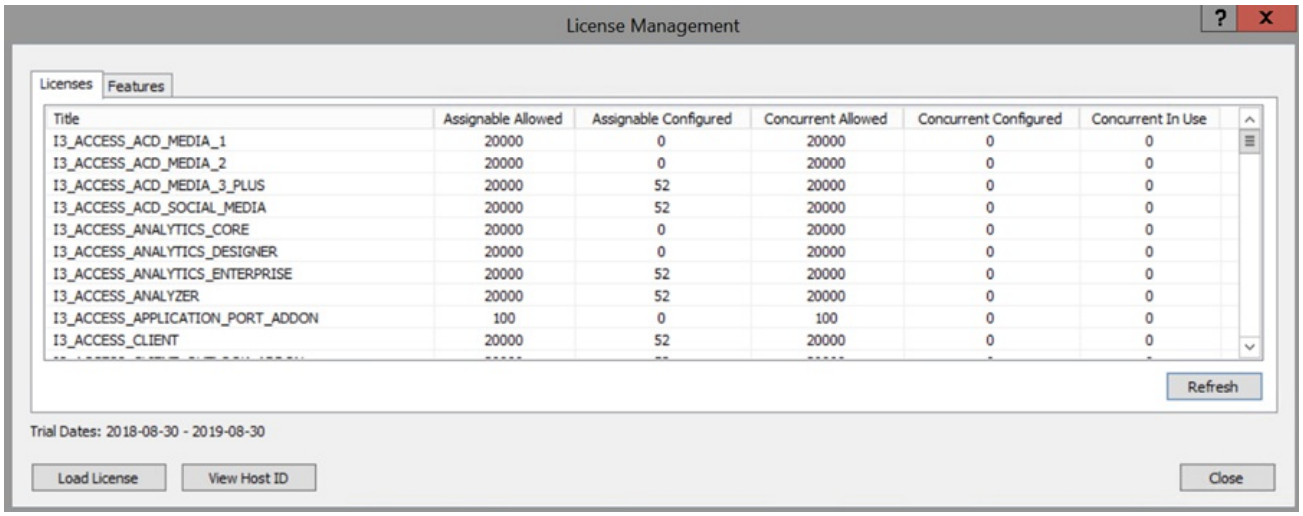
Manage Licenses in Interaction Administrator

View License Information

In Interaction Administrator, you can access the **Licenses** page of the **License Management** dialog box to view information about their licenses and track license compliance.

To view license information

1. On the **File** menu, click **License Management.** The **License Management** dialog box appears.
2. Click the **Licenses** tab.



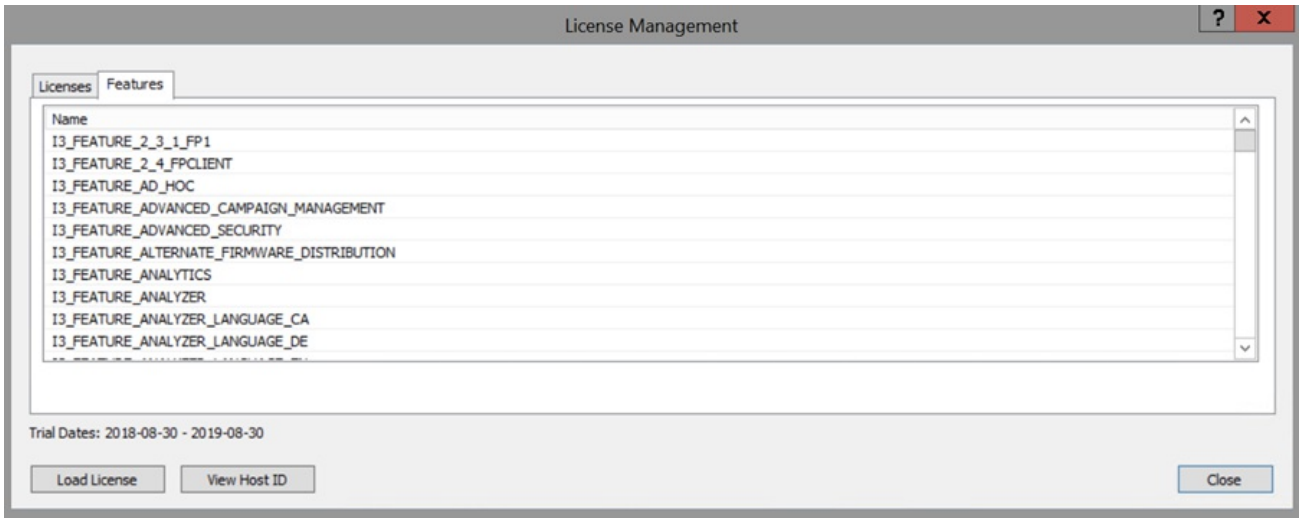
For more information, see the *Interaction Administrator Help* at https://help.genesys.com/cic/mergedProjects/wh_ia/desktop/interaction_administrator_help.htm.

View Feature Information

In Interaction Administrator, you can access the **Features** page of the **License Management** dialog box to view the features included with your licenses.

To view feature information

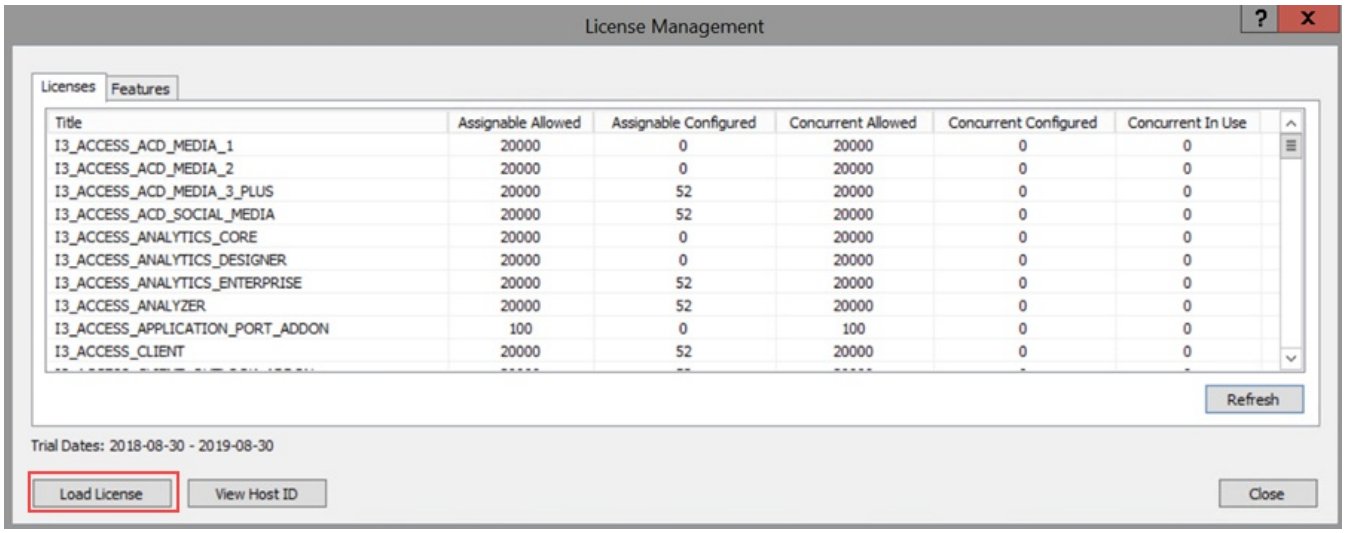
1. On the **File** menu, click **License Management.** The **License Management** dialog box appears.
2. Click the **Features** tab.



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

Load Licenses

The Load License feature in Interaction Administrator allows you to update the license file while the system is in production. You can add seats or users during typical working hours.



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

Remote Station Licensing

CIC supports two types of remote stations:

- Configured (static) Remote stations are Remote Station types in Interaction Administrator with a single remote phone number for all calls to the remote user's extension. These stations use a Basic Station license. If the Remote station is using a trunk, however, it does not require a session.
- Dynamic Remote stations allow traveling users to connect to the IC server and place or receive calls from any remote location. The system looks for an available Basic Station license to process Dynamic Remote station logons. If there are no available Basic Station licenses, the system rejects the logon attempt.

For more information, see Configuring remote stations.

New License Generation

Your license defines the product version, Server features, Basic Station and Access license components, more license components, and license quantities that are in your agreement. Before generating and downloading your license to your IC server, ensure that you ordered your CIC product.

Tip: Check the Activation File Management Tool at least two weeks before installing CIC to confirm that your license information is correct. Having your license on your computer can save you time during the CIC installation process. For more information about opening the Activation File Management Tool, see Open the Activation File Management Tool.

Process Overview

After Genesys processes your order and creates your company account, generate the license using the Activation File Management Tool. Download the license to the IC server.

Who Can Generate Licenses

Only an individual who holds a current CIC Core Technology Certification for a product can generate a license. You can obtain your license file from the Activation File Management Tool. Certified partner employees can generate an unlimited number of 30-day non-ordered development licenses for any product and any configuration.

License Validity

Your new license is valid immediately after you download it. You can download this license as many times as you need.

Tip: Make a backup copy of your downloaded license file.

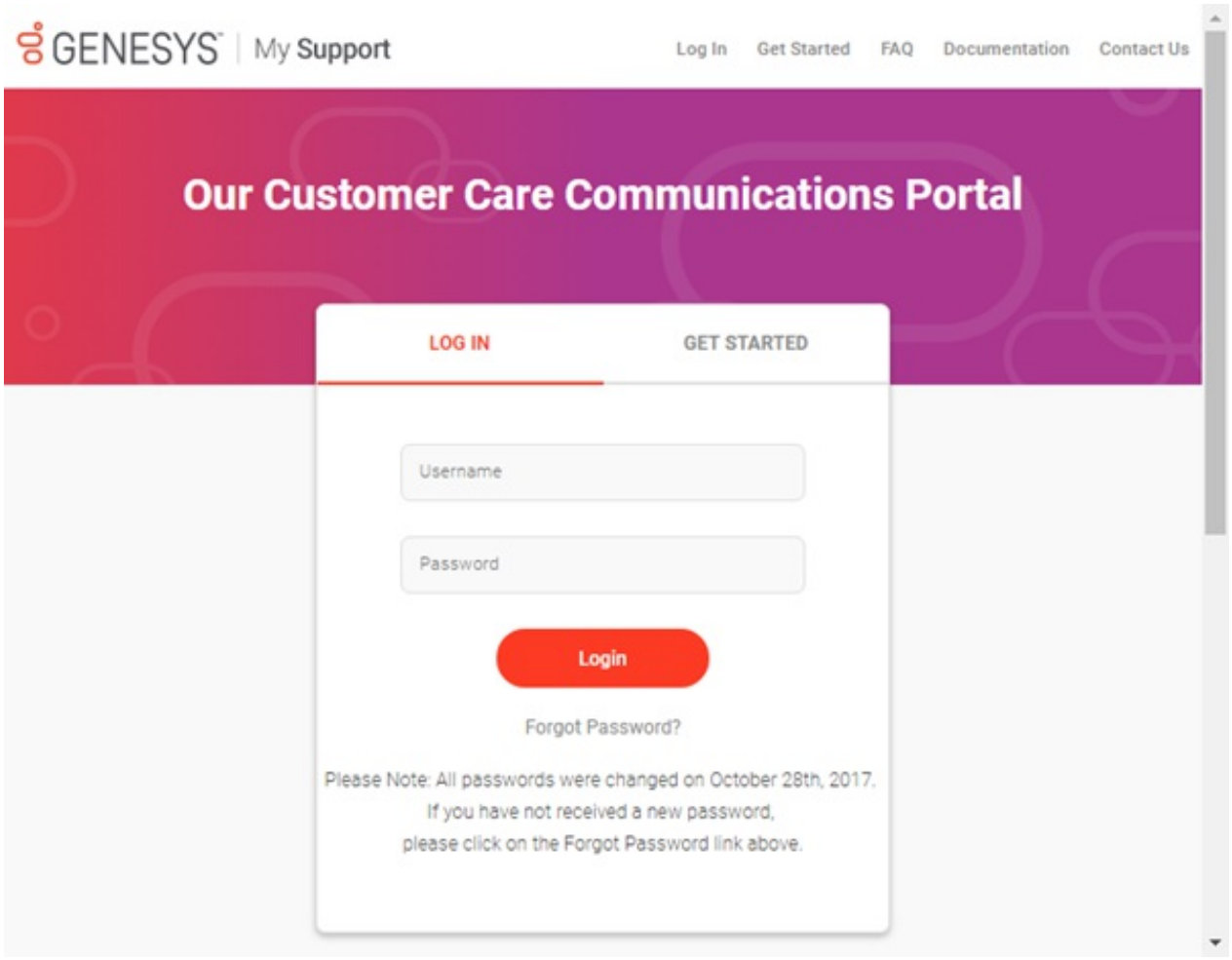
Open the Activation File Management Tool

Customers and partners with the appropriate logon credentials can use the Activation File Management Tool. The method for opening the tool differs but the functionality is the same.

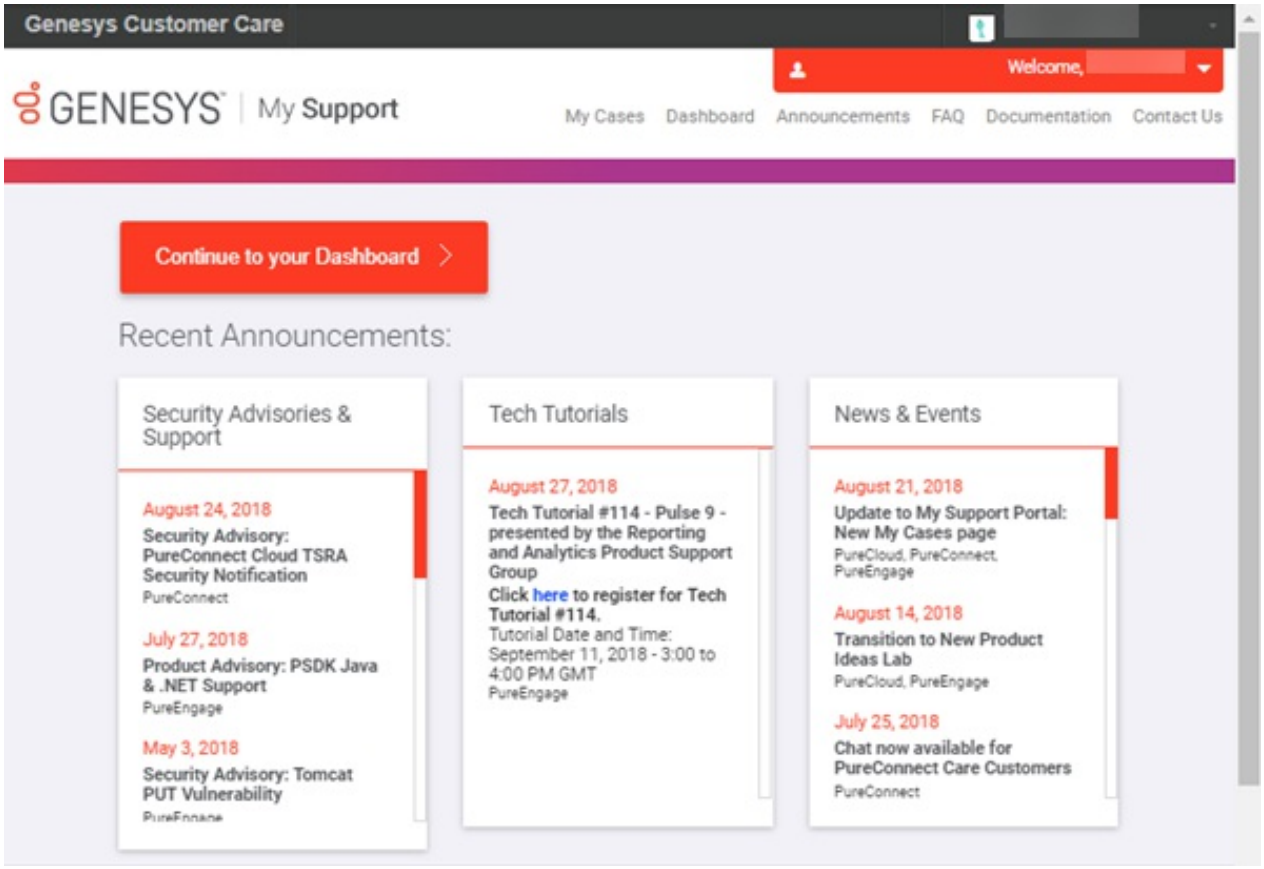
Customers

To access the Activation File Management Tool

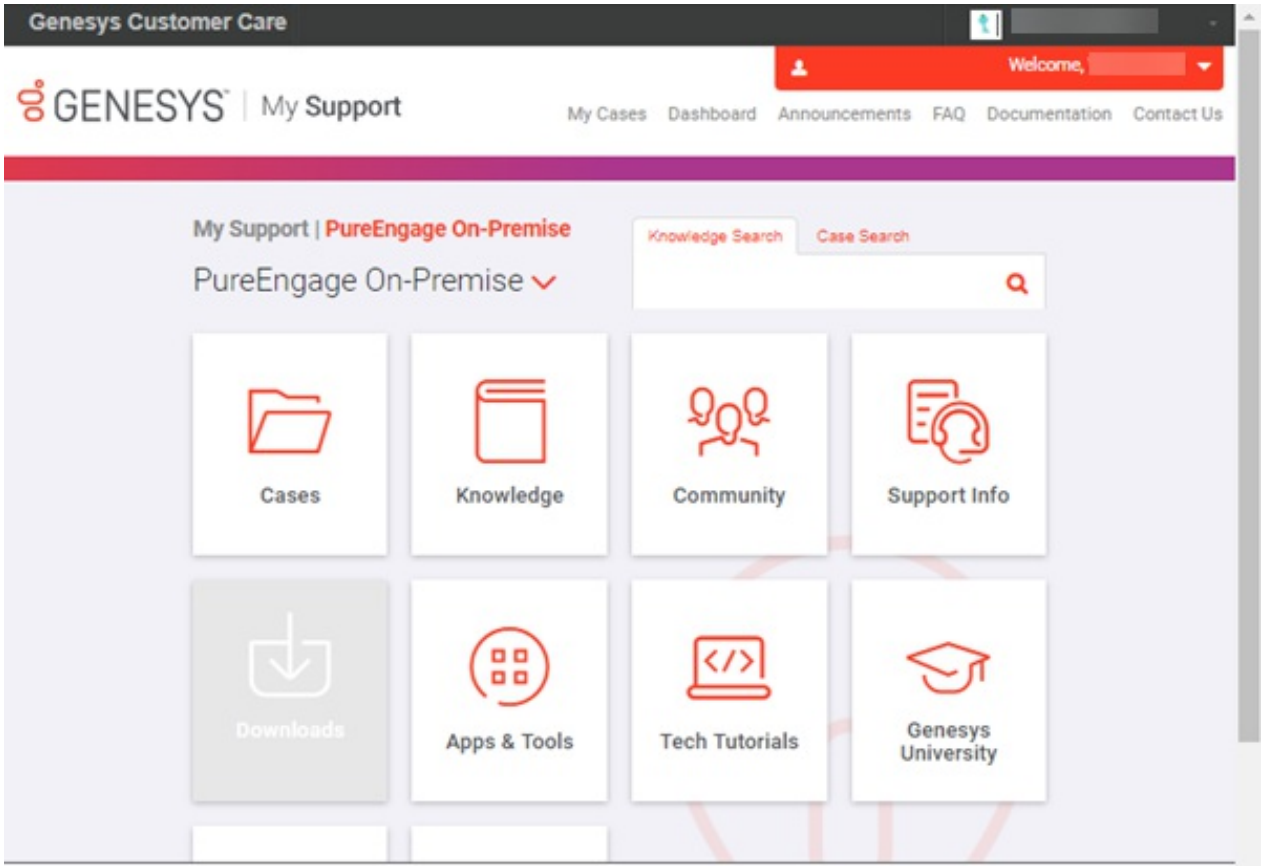
1. Open the My Support Dashboard at https://genesyspartner.force.com/customercare/GenesysCommunityLogin. The **Customer Care Communications Portal Logon** dialog box appears.



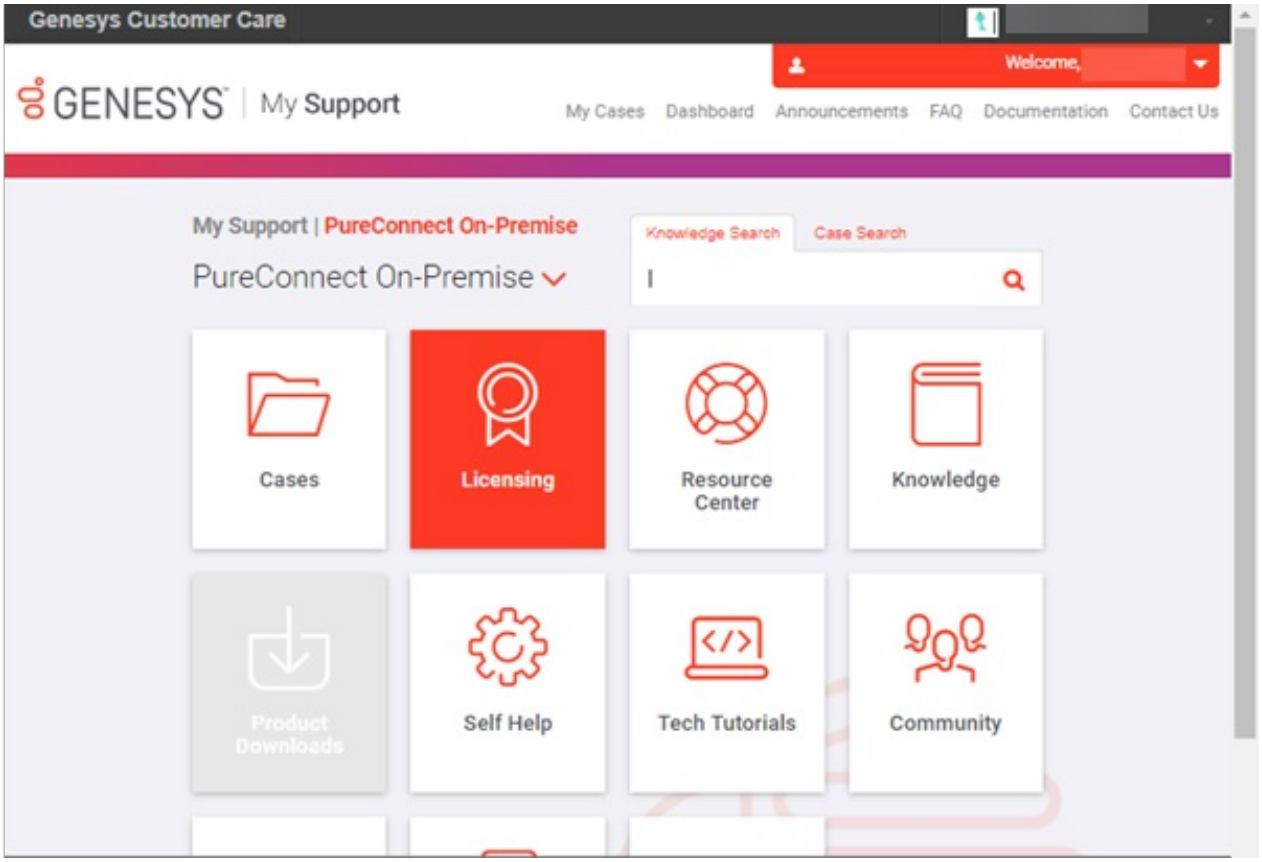
2. Specify your credentials and then click **Login**. The **Recent Announcements** page appears.



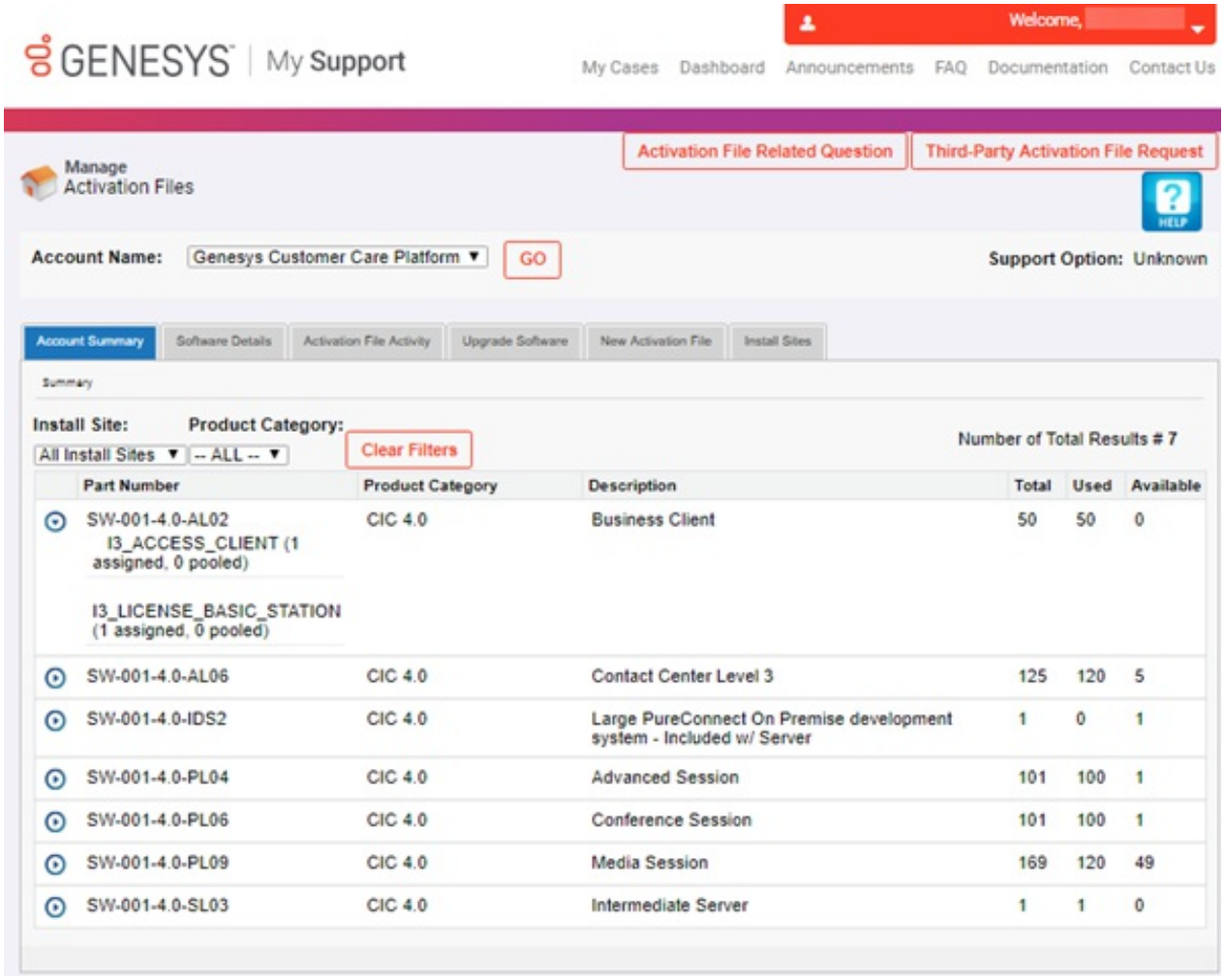
3. Click **Continue to your Dashboard**. Your **Dashboard** appears.



4. In the **PureEngage On-Premise** list box, click **PureConnect On-Premise**. The options for PureConnect On-Premise appear.



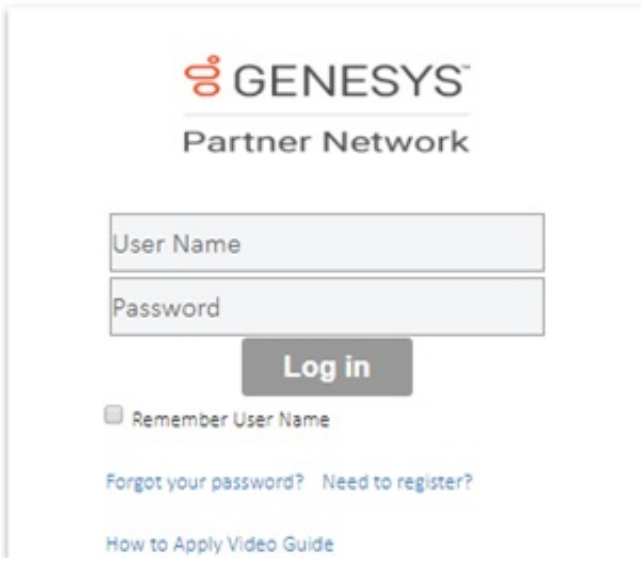
5. Click the **Licensing** tile. The **Manage Activation Files** page appears.



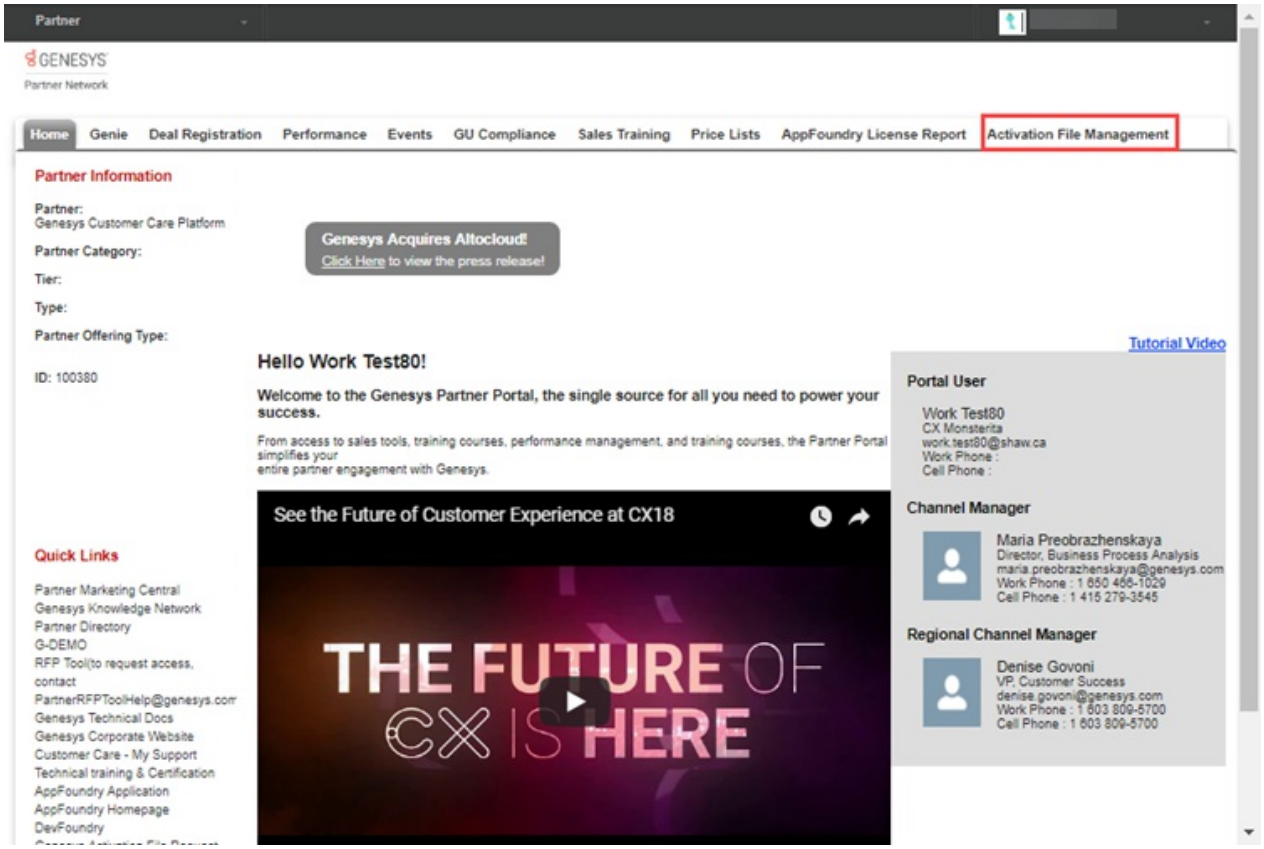
Partners

To access the Activation File Management Tool

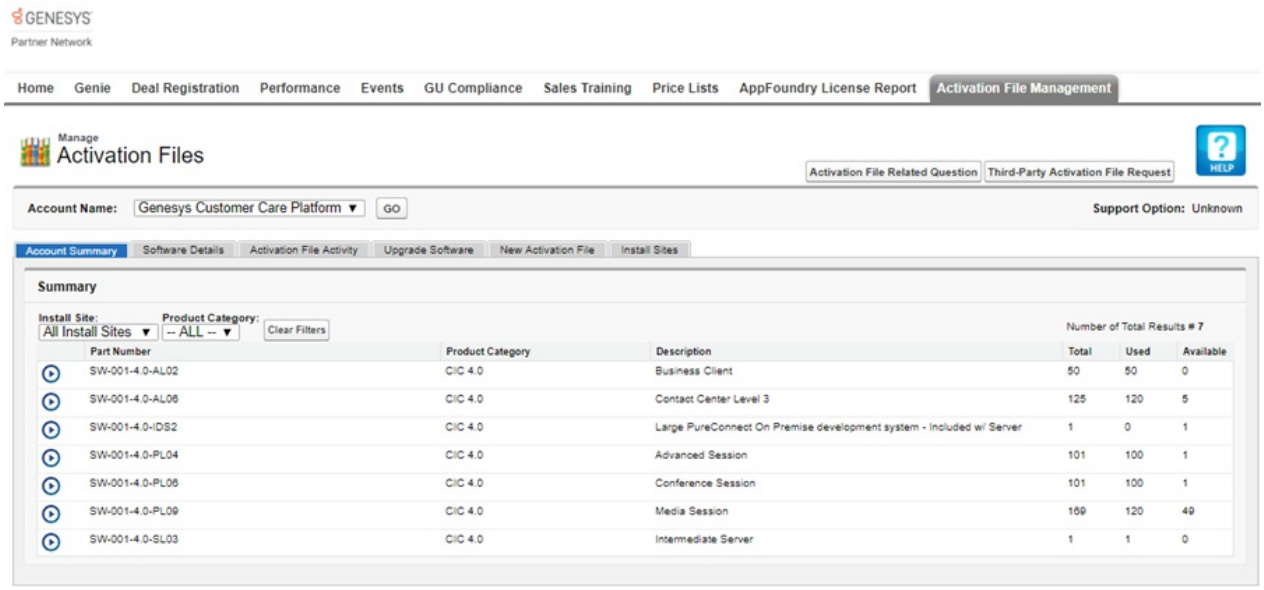
1. Open the Partner Network portal at https://genesyspartner.force.com/partner/Home. The **Partner Network Logon** dialog box appears.



2. Specify your credentials and then click **Login**. The **Partner Network Home** page appears.



3. Click the **Activation File Management** tile. The **Manage Activation Files** page appears.

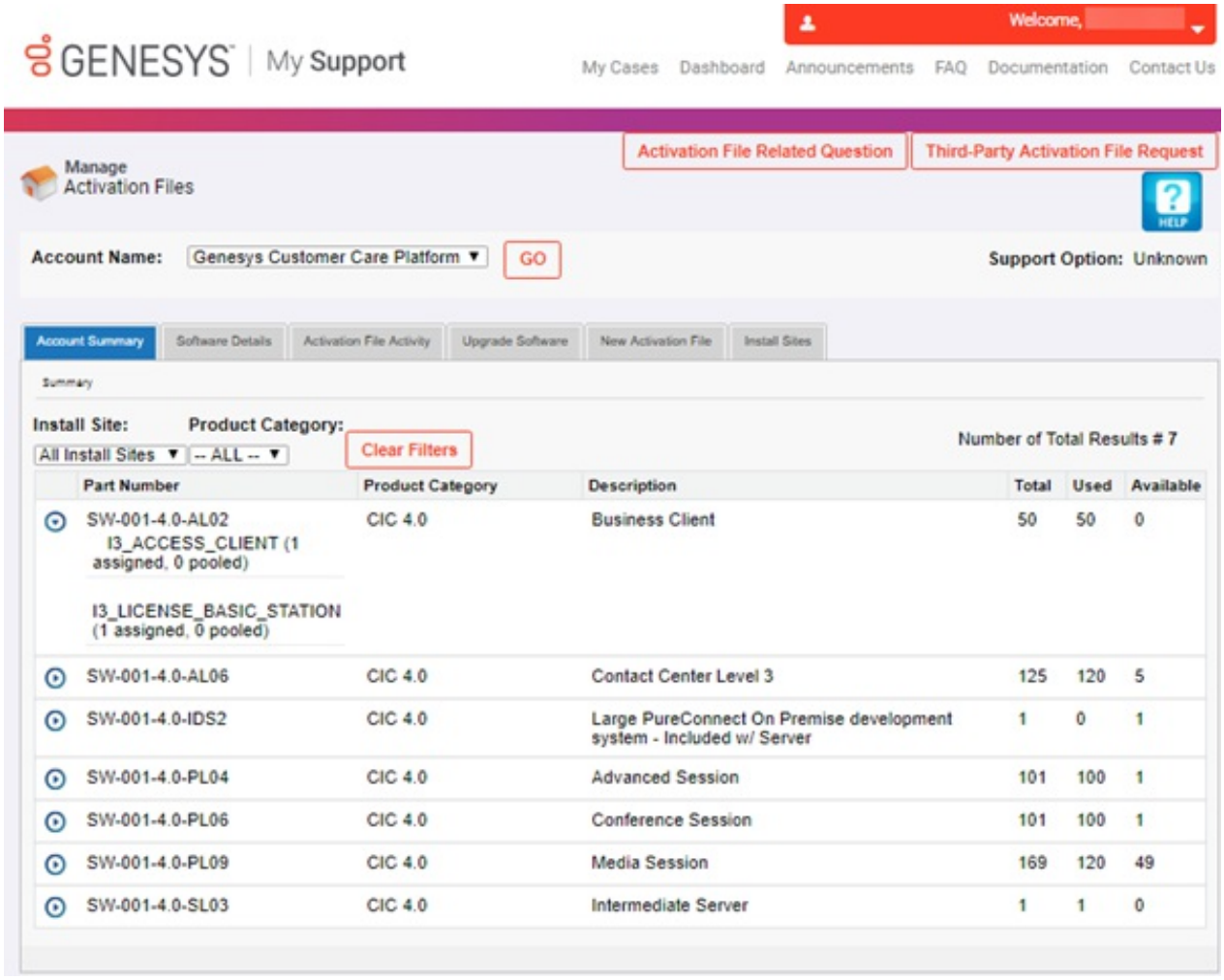


Generate a Production License

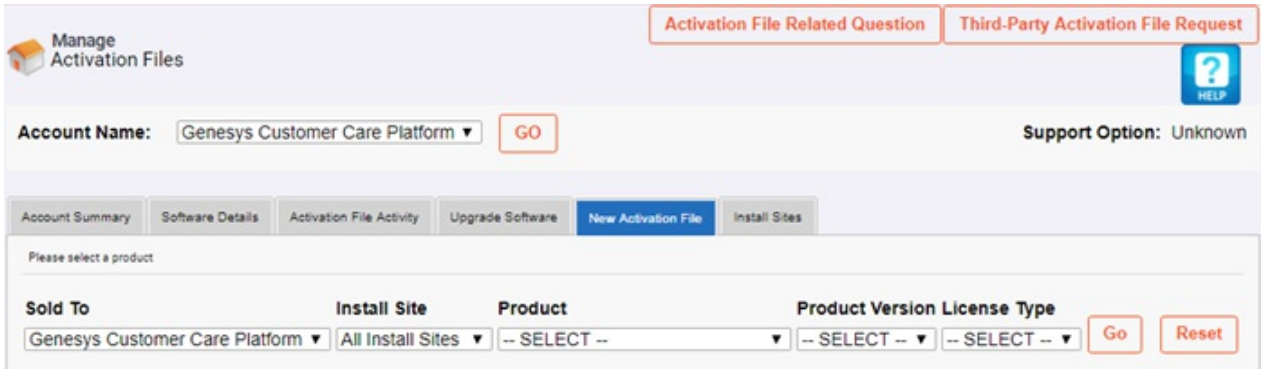
CIC 4.0 Production licenses include information for both IC servers in a switchover pair. You can apply this single license file to both computers.

To generate and download a new license file to your IC server

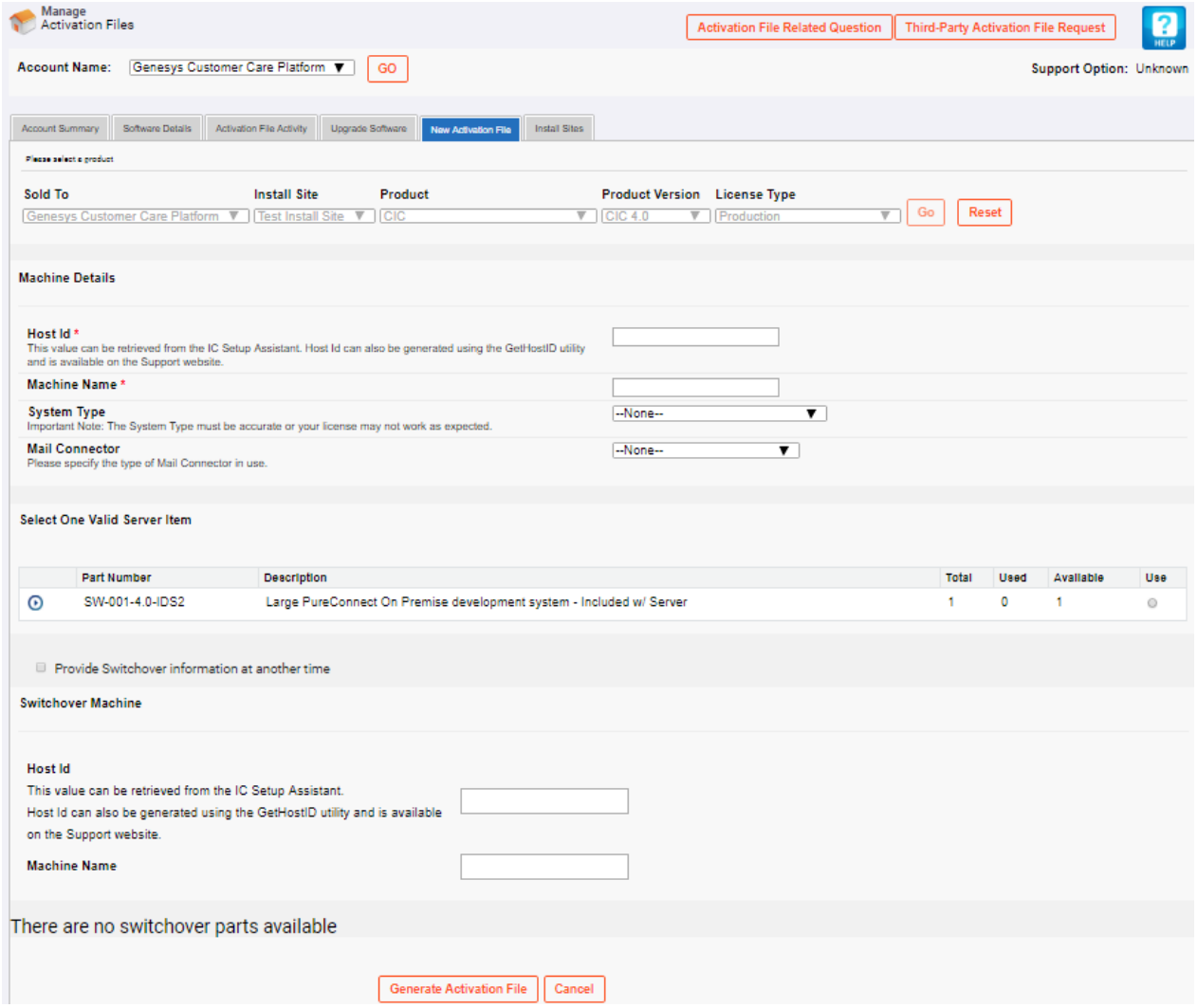
1. Ensure that you placed an order for a CIC production license with Sales, Genesys processed the order, and Genesys created your company account.
2. Open the Activation File Management Tool. The **Account Summary** tab appears.



3. In the **Account Name** list box, select the account to view. A summary of all ordered products that are available to license for the selected account appears.
4. Click the **New Activation File** tab.



5. From the list boxes, select an **Install Site**, **Product**, **Product Version**, and **License Type** and then click **Go**.



6. In the **Machine Details** section, do the following:
   a. In the **Host Id** box, type the host ID of your IC server.

> **Note:** PureConnect Licensing is based on a host ID for the IC server and media server, instead of the MAC address. (The host ID is the code that uniquely identifies a server and locks a license to that server.) Use the GetHostID utility program to generate the host ID before installation. Download the program from the CIC 4.0 `iso` or from the product information site at https://my.inin.com/products/cic/Pages/Utilities-Downloads.aspx.

   b. In the **Machine Name** box, type the name of the IC server to which to download the license file.
   c. In the **System Type** list box, click **Media Server Based**.
   d. In the **Mail Connector** list box, click the type of mail connector in use.
7. In the **Select One Valid Server Item** section, select the server type for which to generate and download a license.
8. If you have licensing for a switchover server, do one of the following:

- If you aren't ready to provide information about the switchover server, select the **Provide Switchover information at another time** check box. The system hides the **Switchover Machine** section. You can return to the Activation File Management Tool later to generate a new license that includes both servers.
- If you are ready to provide information about the switchover server, clear the **Provide Switchover information at another time** check box.

9. To provide information about the switchover server, in the **Switchover Machine** section, do the following:
   a. In the **Host ID** box, type the host ID for the MAC address of the network card on the second IC server in the switchover pair.
   b. In the **Machine Name** box, type the name of the second IC server in the switchover pair.
   c. In the **Select One Valid Switchover Server Item** section, select the switchover server type for the second server in the pair.
10. In the **Select Any Add-on Items** section, select the add-on items to associate to this server license.
11. Click **Generate Activation File**. The license file generates and is ready for download.

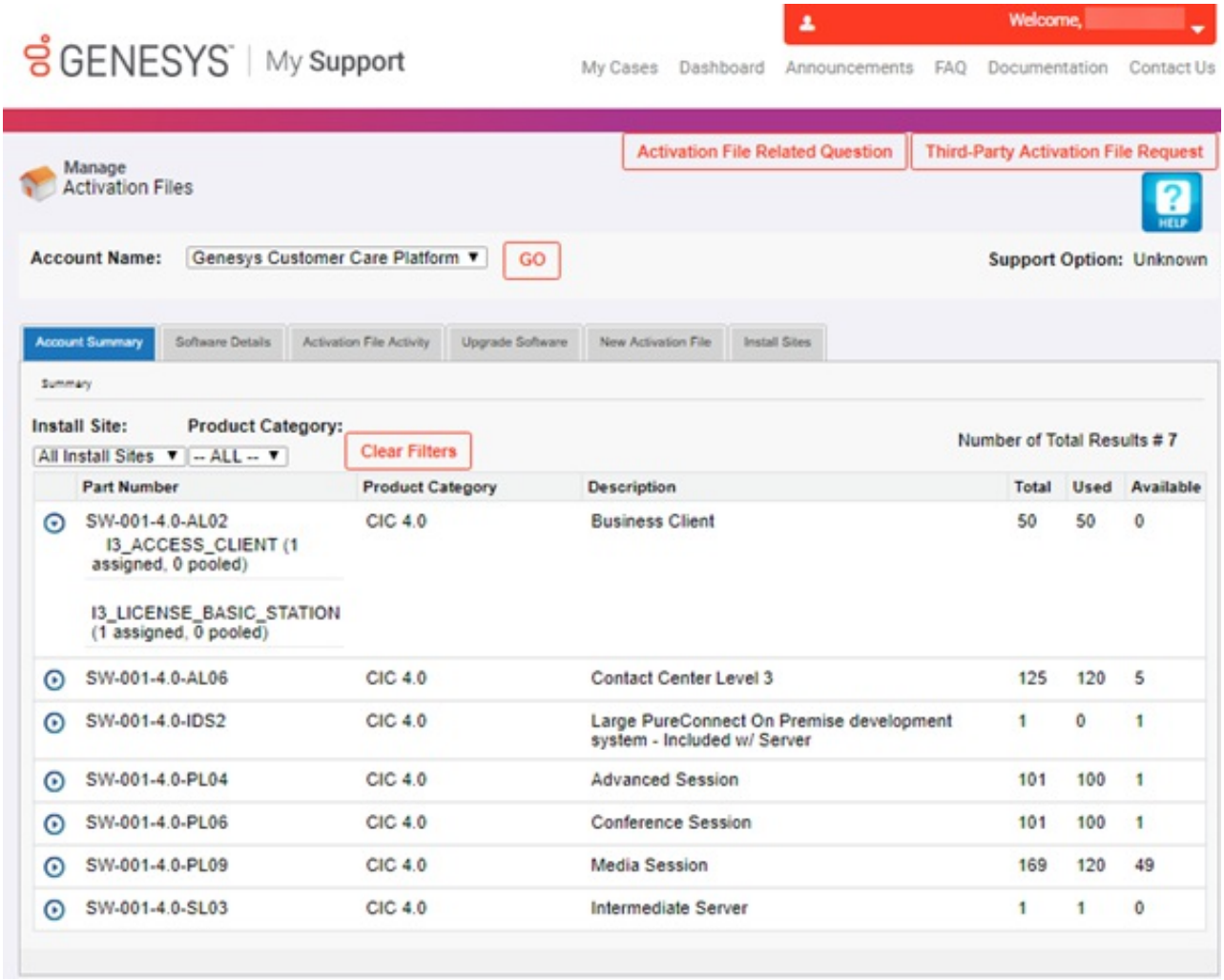
Note: Trial bundle licenses and add-on bundle licenses are not available in the Activation File Management Tool.

Download the Activation File

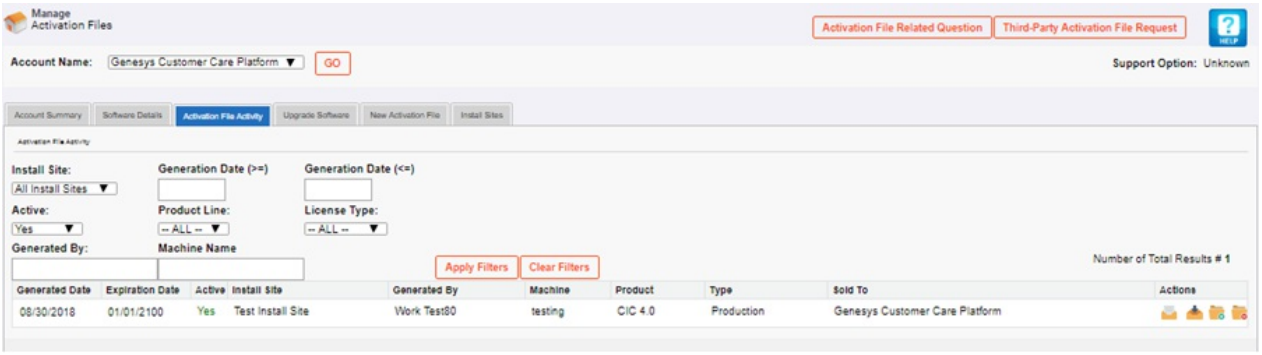
After generating and viewing the license, download the activation file to the IC server or a location accessible from the IC server.

To download the activation file

1. Open the Activation File Management Tool. The **Account Summary** tab appears.



2. Click the **Activation File Activity** tab.



3. In the Actions column, click the Download icon . The file downloads to your default download location (for example, your **Downloads** folder) with a file name extension of "I3Lic.".

   IC Setup Assistant and other installations such as Language Packs require this license file. The system requests it when you install the CIC server software.

Request an Activation File

Customers and partners can submit activation file requests through the Genesys Activation File Request Tool. You can also use this tool to communicate with the Genesys Licensing Team about licensing related issues.

Note: If you need Subscription or Mixed Estate activation files, you must submit a request using this tool because only Genesys Licensing can generate these types of activation files.

To request an activation file

1. Do one of the following:

- For customers with logon credentials to the "My Support Dashboard," do the following:

a. Log on to https://genesyspartner.force.com/customercare/GenesysCommunityLogin.
b. Click **Continue to your Dashboard**.
c. On your **Dashboard**, in the **PureEngage On-Premise** list box, click **PureConnect On-Premise**.
d. Click the **Licensing** tile.
e. On the **Manage Activation Files** page, click **Non Perpetual Activation File Request**.

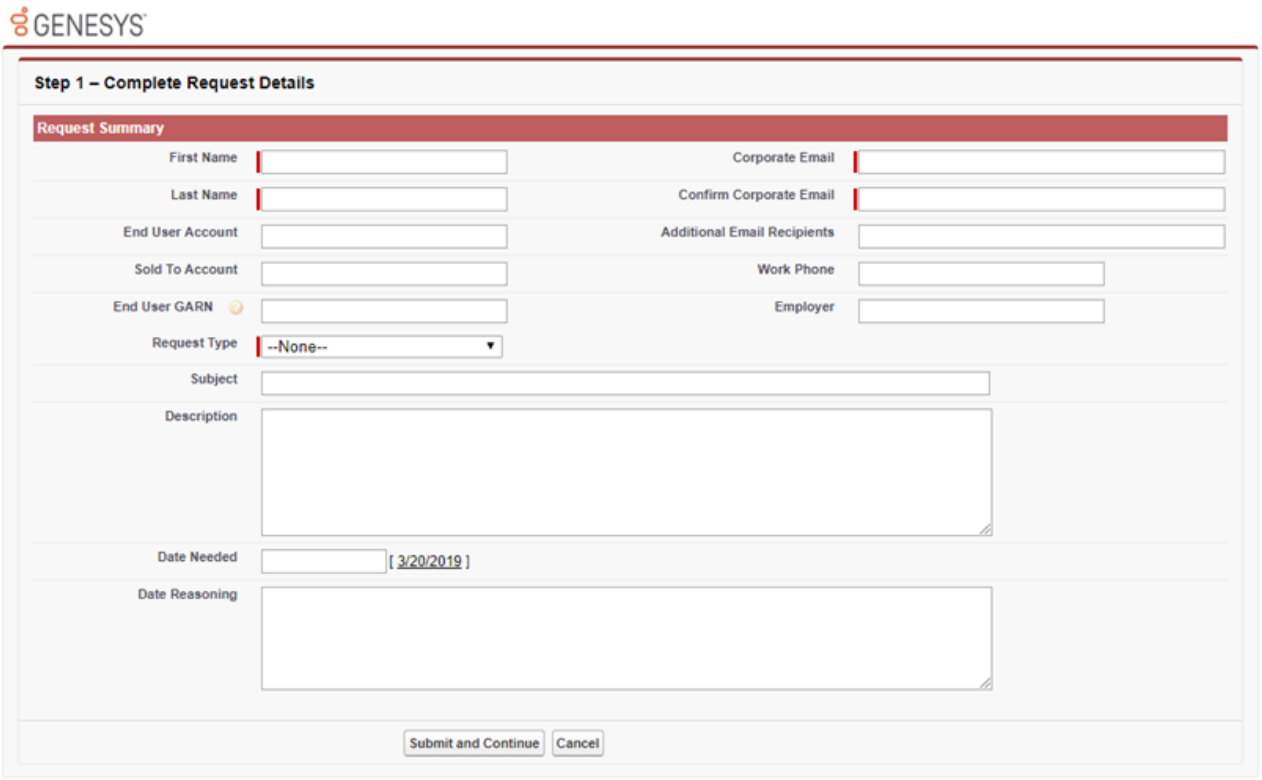
- For Partners with logon credentials to the "Partner Network" portal, do the following:

a. Log on to https://genesyspartner.force.com/partner/Home.
b. On the **Partner Network Home** page, click the **Activation File Management** tile.
c. On the **Manage Activation Files** page, click **Non Perpetual Activation File Request**.

- For customers and partners who want to access the Genesys Activation File Request Tool using a direct link (logon credentials not required), open https://genesys.secure.force.com/activationfile in your browser.

The **Welcome to the Genesys Activation File Request Tool** page appears.

2. Click **Continue**. The **Step 1 – Complete Request Details** page appears. If you accessed the tool from the "My Support Dashboard" or the "Partner Network" portal, the system might populate some of the boxes.



First Name: Contact person's first name.

Last Name: Contact person's last name.

End User Account: End user account for this request.

Sold to Account: Partner or direct customer account that received the Genesys invoice.

End User GARN: Your Genesys Account Reference Number. You can find this number on your Software Fulfillment Notice or your Genesys Sales or Maintenance Renewal Quote. You can also contact your Sales or Genesys Care representative for assistance.

Request Type

> **Question:** Indicates that you have a question for Genesys Licensing.
>
> **Activation File Request:** Indicates that you are requesting an Activation File.

Activation File Category: If you selected "Question" as the request type, this list box isn't available.

> **Genesys Activation File:** Indicates that you are requesting an activation file for a Genesys product.
>
> **Third Party Activation File:** Indicates that you are requesting an activation file for a third-party product.
>
> **Pay Per Use/Hosted Activation File:** Indicates that you are requesting an activation file for a pay-per-use, hosted situation, or subscription.

Activation File Type: Type of activation file, such as New Deployment or Upgrade. If you selected "Question" as the request type, this list box isn't available.

Subject: Short description of your request or question.

Description: Details regarding your activation file request or the question that you are asking.

Urgent: If selected, your request is urgent and requires immediate attention. If you selected "Question" as the request type, this check box isn't available.

Date Needed: Date that you need the activation file or answer to your question.

Date Reasoning: Reason that you need the activation file or answer by the date specified.

Corporate Email: Your corporate email address.

Confirm Corporate Email: Your corporate email address, to ensure that you typed it correctly.

Additional Email Recipients: Email addresses of others to include in responses to this request.

Work Phone: Your work phone number.

Employer: Name of your employer.

3. Complete the information in the **Request Summary** section. For an Activation File Request, another section appears on the page based on the **Activation file Category** and **Activation File Type** that you selected, requesting one or more of the following:

   Primary MAC ID or Host ID: Unique code that identifies the IC server or the host ID for the PureConnect production server.

   Backup MAC ID or Host ID: Unique code that identifies the IC server or the host ID for the PureConnect switchover server.

   Deployment Type: Type of deployment for which you are requesting an activation file. For example, production, lab, test, disaster recovery cold standby, or disaster recovery hot standby.

   Environment Type: Not applicable to PureConnect.

   Expiration Date: Not applicable to PureConnect.

   Expiration Date of the Hosting Contract: Not applicable to PureConnect.

   Implementation Type: Type of implementation for which you are requesting an activation file. For example, add-on, migration, new deployment, reallocation, temporary, or upgrade.

   IVR Configuration: Not applicable to PureConnect.

   MAC ID or Host ID: Unique code that identifies the IC server.

   Max Number of Estimated Ports: Not applicable to PureConnect.

   New Extension Date Requested: Not applicable to PureConnect.

   O/S: Not applicable to PureConnect.

   PBX/SIP: Not applicable to PureConnect.

   Please clarify your request: More information regarding your request.

   Port Type: Not applicable to PureConnect.

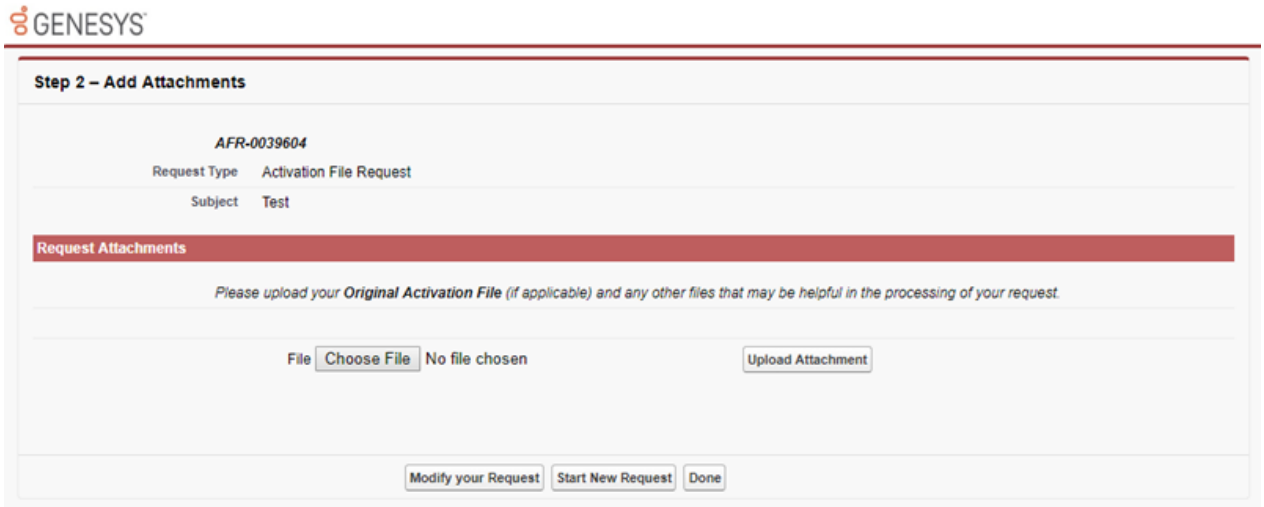
   Primary MAC ID BC DR: Not applicable to PureConnect.

   Backup MAC ID BC DR: Not applicable to PureConnect.

   SO# or PO#: Product sales or purchase order number.

   Third Party Activation File Type: Type of third-party activation file that you are requesting. For example, Nuance or Zoom.

4. If another section appears on the page, complete the information and then click **Submit and Continue**. The system assigns an Activation File Request (AFR) number to the request and displays the **Step 2 - Add Attachments** page.



5. To attach files to the request, do the following:
   a. Click **Browse...**
   b. In the **Open** dialog box, click the file to attach and then click **Open**.
   c. On the **Step 2 - Add Attachments** page, click **Upload Attachment**.
   d. Attach more files as necessary.

6. Click **Done**. The system sends a confirmation email to the email addresses that you provided. You can reply to the confirmation email to provide updates to the Genesys Licensing team. A Genesys Licensing Analyst will contact you to provide the requested file, provide a response to your question, or to request more information.
7. Close your browser.

Licensing in IC Setup Assistant

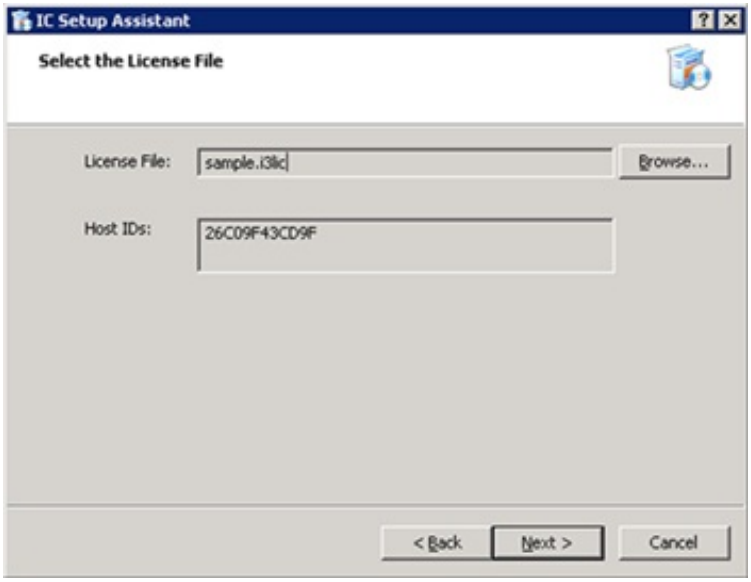
During CIC installation, the IC Setup Assistant wizard allows you to configure the IC server. The IC Setup Assistant tasks applicable to licensing are:

- Selecting your license file.
- Configuring your switchover servers.
- Allocating Access licenses to newly created stations.

For more information about IC Setup Assistant as it pertains to licensing, see "IC Setup Assistant" in the *PureConnect Installation and Configuration Guide*, available at https://help.genesys.com/cic/mergedProjects/wh_iandc/desktop/ic_installation_and_configuration_intro.htm.

Select Your License File

IC Setup Assistant requires the valid CIC 4.0 license file that you generated and downloaded from the Activation File Management Tool, as described in Generate a Production License and Download the Activation File. By default, IC Setup Assistant looks in the `\I3\IC` directory for your license file (`xxx.I3Lic`). If your license file is not in this directory, browse to the appropriate directory.



You must have an appropriate license for your version of CIC. Your license defines what version, server components, and quantities are in your agreement. If you have any questions about your license or to resolve any licensing issues, contact your reseller.

Configure Your Switchover Servers

If you have licensing for switchover and you provided the information for the switchover server when you generated the new license, specify the same license file on each server when running IC Setup Assistant.

Allocate Licenses in IC Setup Assistant

We recommend that you allocate Basic Station licenses to the stations that you create in IC Setup Assistant. You can also allocate Client Access and ACD Access licenses to the stations in IC Setup Assistant or you can wait until post-installation and allocate them in Interaction Administrator. For more information, see Station Licensing.

Licensing in Interaction Administrator

Station Licensing

All workstations and configured remote stations require allocation of a Basic Station license to activate station audio. If you save an enabled station configuration that does not have the Basic Station license allocated, a message appears indicating that the station cannot activate until you allocate a Basic Station license.

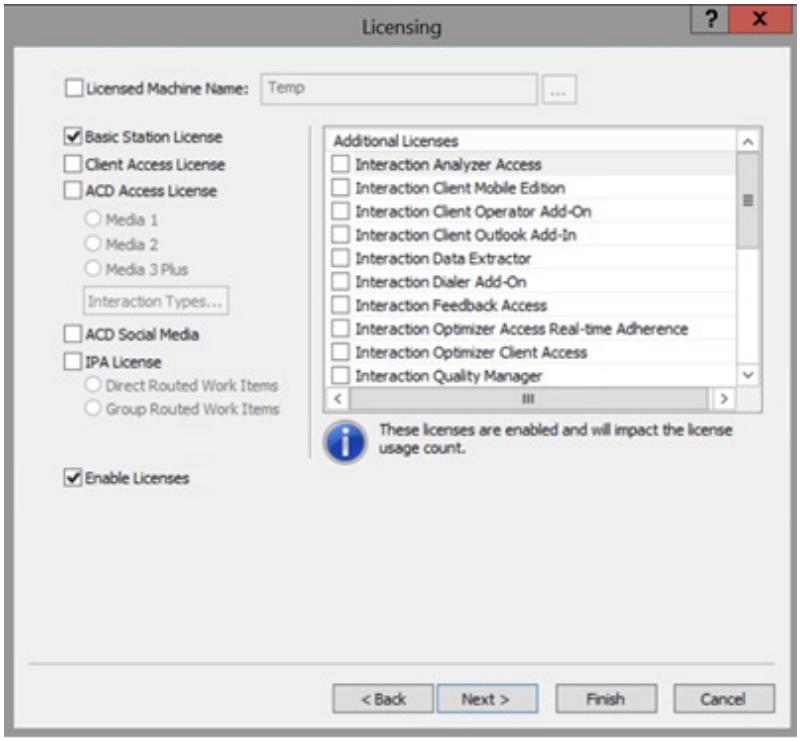
Allocate Licenses to Stations

Allocate Licenses When Adding a Station

The **Licensing** page allows you to allocate licenses when adding a station. For more information, see the *Interaction Administrator Help* at https://help.genesys.com/cic/mergedProjects/wh_ia/desktop/interaction_administrator_help.htm.

To allocate licenses when adding a station

1. Click the **Stations** container and then press the **Insert** key.
2. Provide a station name, station type, and station template.
3. Click **Next**, configure the station, and then click **Next**. The **Licensing** page appears.



Licensed Machine Name: If selected, allows you to change the machine name to which to associate the station. The machine name cannot be a duplicate of an already **Licensed Machine Name** and it cannot be blank.

Basic Station License: If selected, allocates a Basic Station license to the station. Represents an audio path between CIC and a station. The system doesn't require this license but without it, the station does not have a dial tone or audio. You can use a non-audio station for non-audio interactions.

> **Note:** Allocate a Basic Station license to remote stations.

Client Access License: If selected, allocates a Client Access license to the user to allow the station to run an instance of the CIC client software. Without this license allocation, the CIC client cannot run on the station.

ACD Access License: If selected, allocates an ACD Access license to the station. Failure to have an ACD Access license allocated to a station prevents the station from being active in ACD calls.

Media 1: Allows one interaction type at a specified time.

Media 2: Allows two interaction types at a specified time.

Media 3 Plus: Allows three or more interactions at a specified time. Valid Interaction Types are: Call/Callback, Chat, Email, and Generic.

ACD Social Media: If selected, allocates an ACD Social Media license to the station to allow the station to receive routed social media interactions.

IPA License: If selected, allocates an IPA license to the station. If the station is an IPA station, select this license and then specify the license type. Valid IPA license types for a station are:

Direct Routing Work Items: (`I3_ACCESS_IPA_USER`) If selected, allows the station to start any process to which the station has rights. It also allows the station to receive Work Items that route to it directly.

Group Routed Work Item: (`I3_ACCESS_IPA_USER_ACD`) If selected, allows the station to receive Work Items that either route to it directly or to a workgroup (similar to an ACD queue.)

Enable Licenses: If selected, activates the license settings. If cleared, the system ignores the license settings in this dialog box. This option allows you to turn off licensing for a station, but keep the license settings.

Additional Licenses: If selected, allocates the license to the station. Only purchased licenses display in the list box.

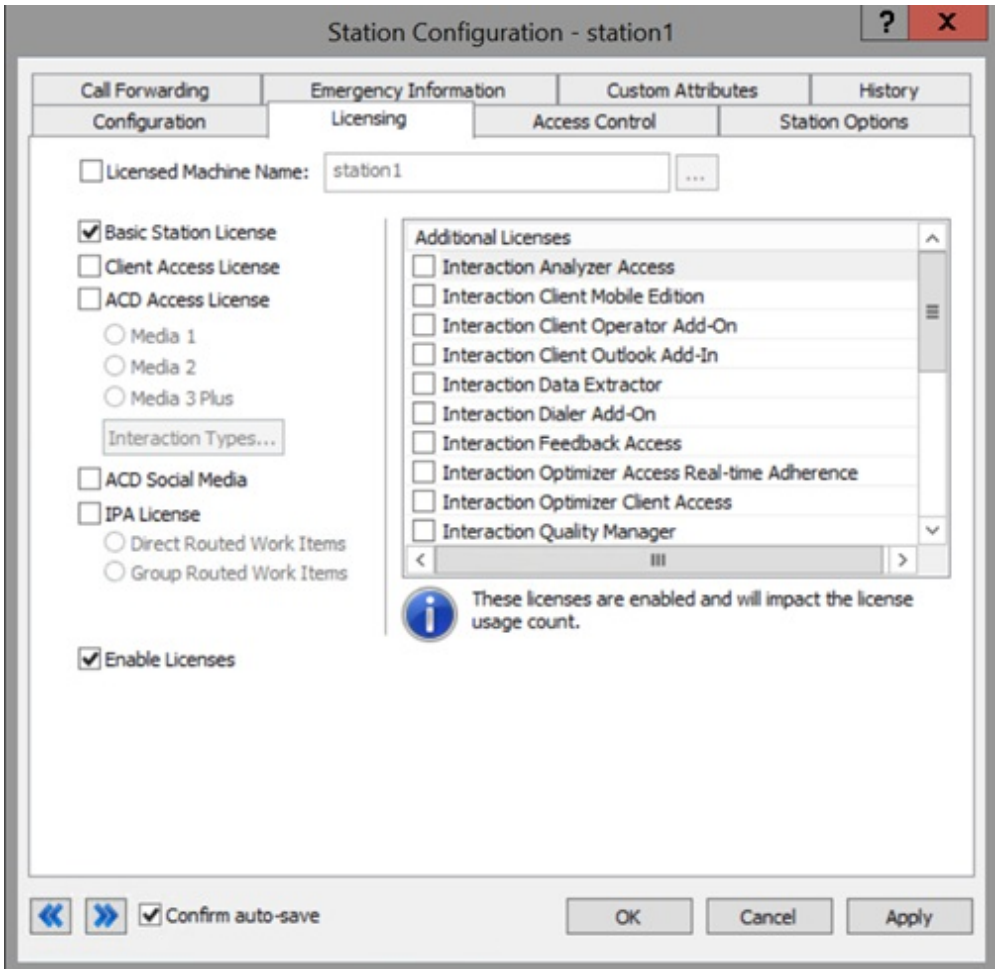
4. Complete the information and then click **Next**.
5. Continue setting up the new station.

Allocate Licenses When Modifying a Station

The **Licensing** tab in the **Station Configuration** dialog box allows you to allocate licenses when modifying a station. For more information, see the *Interaction Administrator Help* at https://help.genesys.com/cic/mergedProjects/wh_ia/desktop/interaction_administrator_help.htm.

To allocate licenses when modifying a station

1. In the right pane of the **Stations** container, double-click the station for which to allocate a license. The **Station Configuration** dialog box appears.
2. Click the **Licensing** tab.



Licensed Machine Name: If selected, allows you to change the machine name to which to associate the station. The machine name cannot be a duplicate of an already **Licensed Machine Name** and it cannot be blank.

Basic Station License: If selected, allocates a Basic Station license to the station. Represents an audio path between CIC and a station. The system doesn't require this license but without it, the station does not have a dial tone or audio. You can use a non-audio station for non-audio interactions.

> **Note:** Allocate a Basic Station license to remote stations.

Client Access License: If selected, allocates a Client Access license to the user to allow the station to run an instance of the CIC client software. Without this license allocation, the CIC client cannot run on the station.

ACD Access License: If selected, allocates an ACD Access license to the station. Failure to have an ACD Access license allocated to a station prevents the station from being active in ACD calls.

Media 1: Allows one interaction type at a specified time.

Media 2: Allows two interaction types at a specified time.

Media 3 Plus: Allows three or more interactions at a specified time. Valid Interaction Types are: Call/Callback, Chat, Email, and Generic.

ACD Social Media: If selected, allocates an ACD Social Media license to the station to allow the station to receive routed social media interactions.

IPA License: If selected, allocates an IPA license to the station. If the station is an IPA station, select this license and then specify the license type. Valid IPA license types for a station are:

Direct Routing Work Items: (`I3_ACCESS_IPA_USER`) If selected, allows the station to start any process to which the station has rights. It also allows the station to receive Work Items that route to it directly.

Group Routed Work Item: (`I3_ACCESS_IPA_USER_ACD`) If selected, allows the station to receive Work Items that either route to it directly or to a workgroup (similar to an ACD queue.)

Enable Licenses: If selected, activates the license settings. If cleared, the system ignores the license settings in this dialog box. This option allows you to turn off licensing for a station, but keep the license settings.

Additional Licenses: If selected, allocates the license to the station. Only purchased licenses display in the list box.

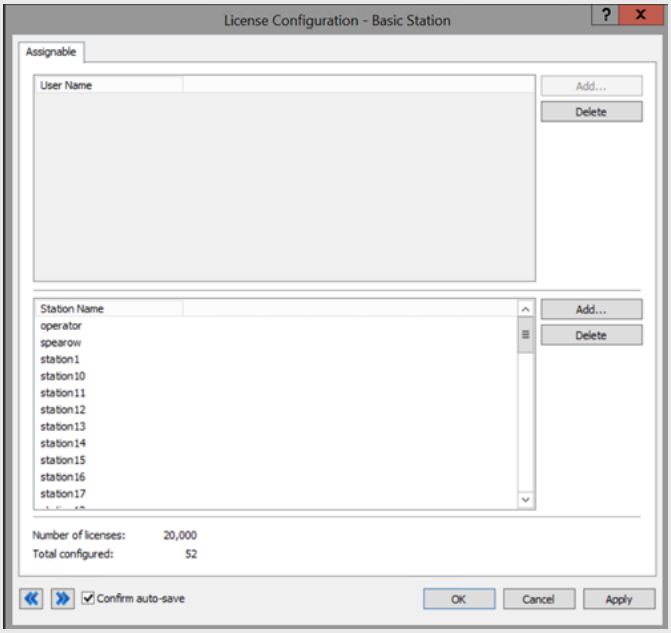
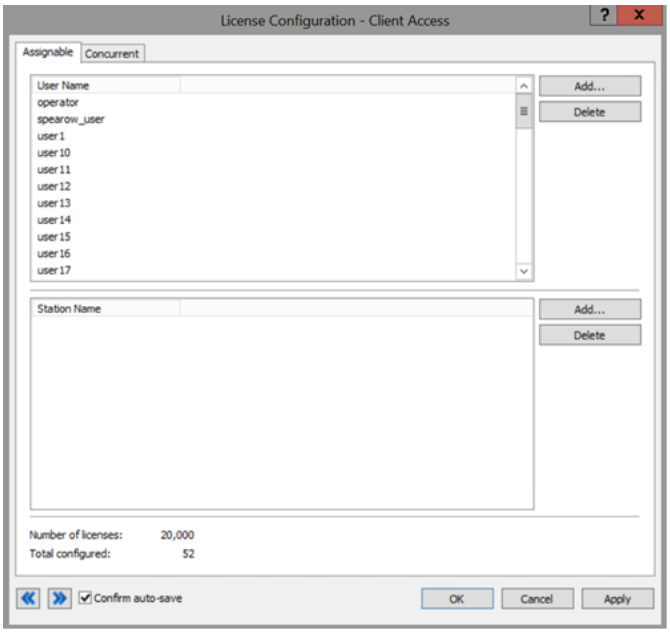
3. Modify the information as necessary and then click **OK**.

Allocate Licenses to Stations Through the Licenses Allocation Container

The **License Configuration** dialog box allows you to allocate basic or non-basic licenses to a station. You can only configure Station licenses as Assignable. For more information, see the *Interaction Administrator Help* at https://help.genesys.com/cic/mergedProjects/wh_ia/desktop/interaction_administrator_help.htm.

To allocate a license to a station through the Licenses Allocation container

1. In the right pane of the **Licenses Allocation** container, double-click the license to allocate to a station.

If...	Then...
You are allocating a Basic Station license...	The **License Configuration** dialog box appears. 
You are allocating a non-Basic Station license...	The **License Configuration** dialog box appears as follows: 

2. Next to the **Station Name** box, click **Add** to select the stations to which to allocate the license.
3. Click **OK**.

Note: For more information about allocating licenses to users, see Allocate licenses to users through the Licenses Allocation container.

Configure Remote Stations

Dynamic and Configured (static) Remote station connections each serve a slightly different purpose, depending on the needs of the call center and of the remote agent. Both provide the same full functionality in the CIC client.

Dynamic Remote Client Connections

Dynamic Remote stations allow traveling users to connect to the IC server and place or receive calls from any remote location. This feature provides maximum flexibility for users who work from multiple locations and receive calls to a single phone number.

Dynamic Remote stations are not predefined station names configured in Interaction Administrator—the telephone number given when the user starts the CIC client and logs on to the IC server is the Remote station. The IC server detects when the user is logged on and routes calls for that user's extension to the remote phone number.

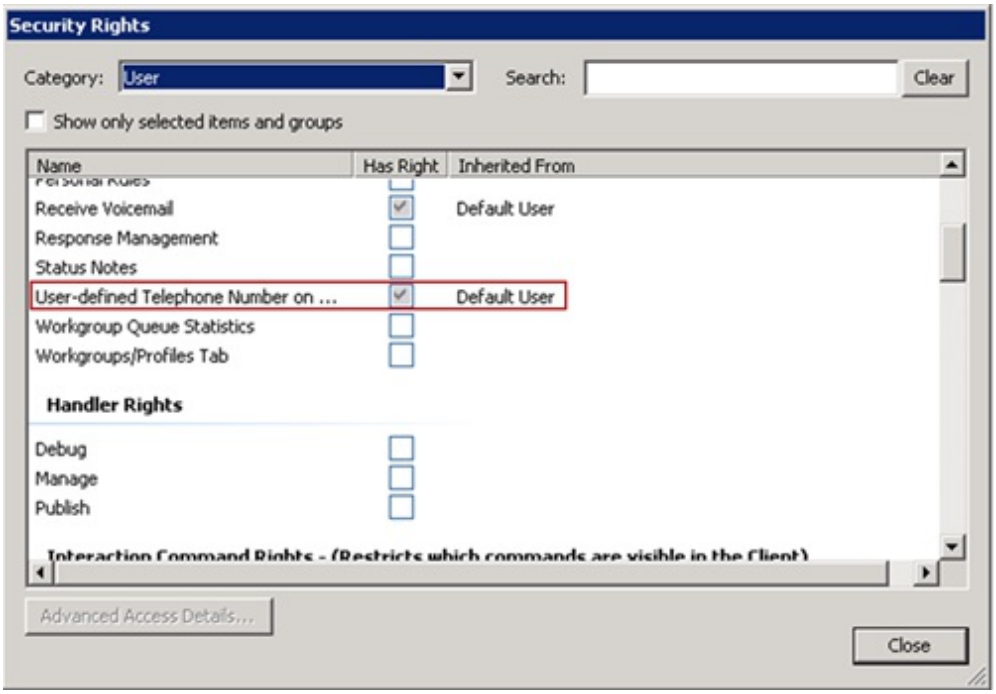
These Dynamic Remote stations do not appear in Interaction Administrator. However, for a remote user to use a Dynamic Remote station by entering a new phone number in the logon dialog box, that user must have the appropriate security rights granted in Interaction Administrator.

You can associate licenses to users or stations. However, there is no way to associate Access license keys to Dynamic Remote stations. Therefore, apply Access licenses to users when using Dynamic Remote stations. An unused Basic Station license must be available when the user logs on for the system to use a Dynamic Remote station. For example, if the system allocated all Basic Station licenses to stations, no Dynamic Remote stations logons succeed.

Dynamic Remote Station Licensing

Even though you don't configure Dynamic Remote stations in Interaction Administrator, each Dynamic Remote station connection counts toward the total number of station licenses purchased for your IC server. The system adds the number of current Dynamic Remote station connections to the number of configured stations, such as Remote stations, Workstations, and Stand-alone phones that are active to calculate the total number of active stations. If a remote user attempts to start the CIC client and log on to the IC server when the total number of station licenses is in use, that user cannot connect and a message appears indicating that no stations are available. The system logs a message on the Event Log on the IC server also.

To enable a Dynamic Remote station, select the **User-defined Telephone Number on Remote Login** check box in the **Client Rights** section of the **Security Rights** dialog box, or this option can be an inherited right. The option is selected by default for all users.



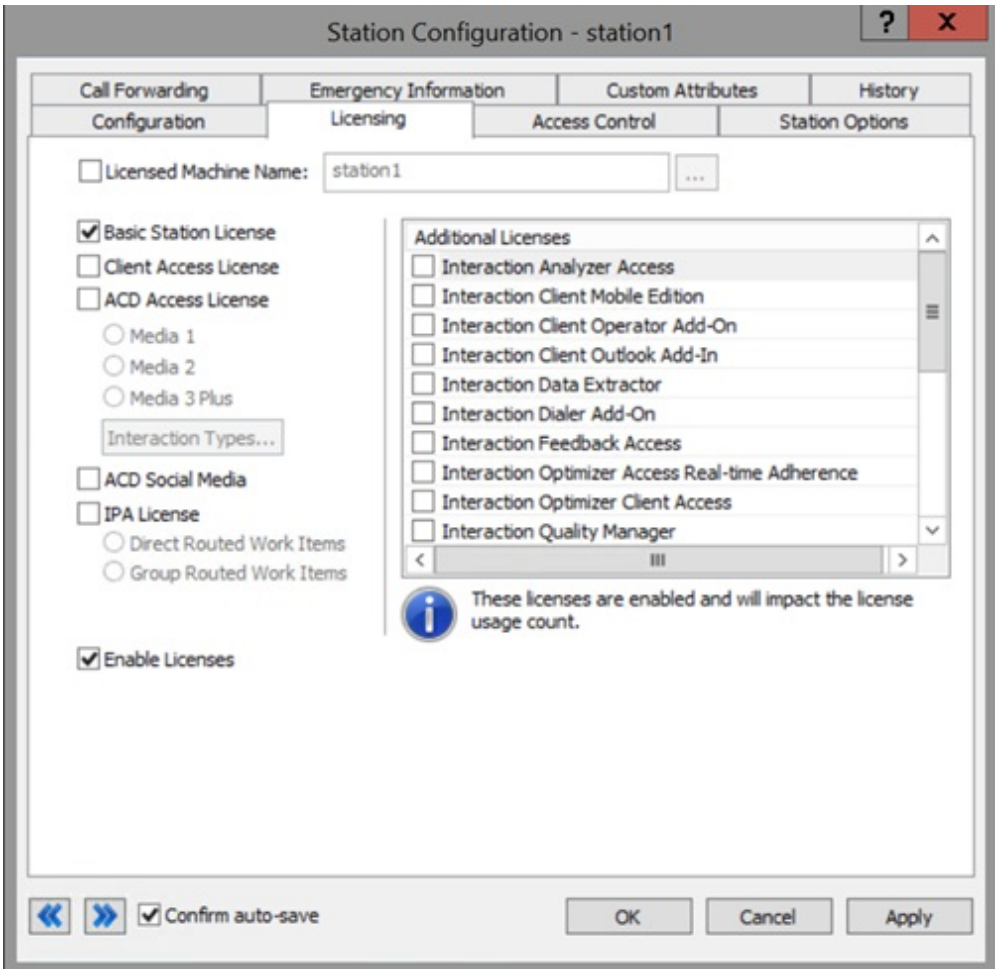
Configured Remote Stations

Configured Remote stations ensure that the remote user always connects to the IC server using the same remote phone number, unless a CIC Administrator changes it. Some call centers prefer this approach to ensure that remote agents are working from the prescribed location.

The Remote station name can be the same as the remote user's workstation (computer) name, or it can be another name. The CIC administrator is responsible for creating these Remote station workstations and either installing the CIC client with the appropriate command-line parameters on the remote user's computer, or educating the remote user on how to use the CIC client (remote) **Login** dialog to specify the station name.

Configured Remote Station Licensing

You can associate licenses to Remote stations by configuring specific Remote stations, such as a user's home phone or a mobile user's cell phone. You can also allocate licenses to Remote stations from other PBXs.



SIP Stations

Remote users who use a SIP-enabled device or IP phone to receive calls from the IC server are not Remote stations, neither dynamic nor configured. The reason is because SIP devices and phones connect directly to the IC server by an IP-based network connection. Distance or location with a SIP device or phone has nothing to do with its classification as a Remote station.

You configure each SIP device and phone as a local Workstation type of station in Interaction Administrator, with the Connection Type of SIP, instead of a Connection Type of Line for analog phone Workstations. The configuration specifies the SIP address of the computer, which must be on the same domain or trusted domain as the IC server. Some remote users with SIP devices and phones can use a Virtual Private Network (VPN) connection over the Internet to connect to the domain, run the CIC client, and log on to the IC server. The IC server treats these stations as local workstations.

Complete Post-installation Certification Testing

For post-installation verification testing, allocate a Client Access license to any stations used to test calls on CIC client phones on client workstations. Allocate an ACD Access license to any stations used to test ACD calls.

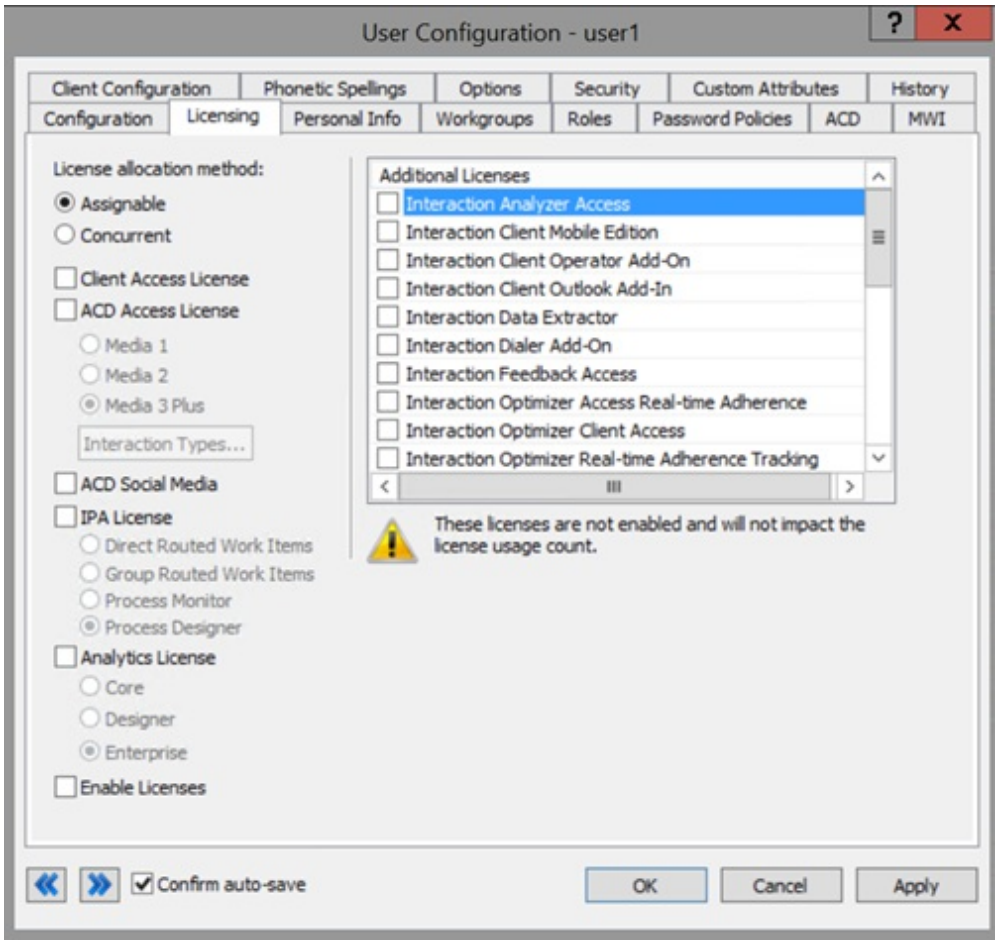
User Licensing

Allocate Licenses When Adding a User

The **Licensing** tab in the **User Configuration** dialog box allows you to allocate licenses when adding a user. For more information, see the *Interaction Administrator Help* at https://help.genesys.com/cic/mergedProjects/wh_ia/desktop/interaction_administrator_help.htm.

To allocate licenses when adding a user

1. In the **People** container, click the **Users** subcontainer and then press the **Insert** key.
2. Specify a user name and then click **OK**. The **User Configuration** dialog box appears.
3. Configure the user and then click **OK**.
4. Click the **Licensing** tab.



License allocation method:

Assignable: If selected, the system requires Assignable user and station licenses immediately upon allocation.

Concurrent: If selected, the system requires Concurrent user licenses as needed.

Client Access License: If selected, allocates a Client Access license to the user to allow the user to run an instance of the CIC client software. Without this license allocation, the CIC client cannot run on the station.

ACD Access License: If selected, allocates an ACD Access license to the user. Failure to have an ACD Access license allocated to a station prevents the station from being active in ACD calls.

Media 1: Allows one interaction type at a specified time.

Media 2: Allows two interaction types at a specified time.

Media 3 Plus: Allows three or more interactions at a specified time. Valid Interaction Types are: Call/Callback, Chat, Email, and Generic.

ACD Social Media: If selected, allocates an ACD Social Media license to the user to allow the user to receive routed social media interactions.

IPA License: If selected, allocates an IPA license to the user. The following license types are available:

Direct Routing Work Items: (`I3_ACCESS_IPA_USER`) If selected, allows the user to start any process to which the user has rights. It also allows the user to receive Work Items that route to them directly.

Group Routed Work Item: (`I3_ACCESS_IPA_USER_ACD`) If selected, allows the user to receive Work Items that either route to them directly or to a workgroup (similar to an ACD queue.)

Process Monitor: `(I3_ACCESS_IPA_MONITOR)` If selected, allows the user to view process status and details in the Process Monitor or to use Process Reporting in IC Business Manager applications.

Process Designer: `(I3_ACCESS_IPA_DESIGNER)` If selected, allows the user to use the Process Designer to create and modify Interaction Process Automation processes.

Analytics License: If selected, allocates an Analytics license to the user. The following licensing tiers are available:

Core: (I3_ACCESS_ANALYTICS_CORE) If selected, allows the user to log on and view dashboards.

Designer: (I3_ACCESS_ANALYTICS_DESIGNER) If selected, allows the user to log on; and view, create, and edit dashboards.

Enterprise: (I3_ACCESS_ANALYTICS_ENTERPRISE) If selected, allows the user to log on; view, create, and edit dashboards; and merge in external data sources.

Enable Licenses: If selected, activates the license settings. If cleared, the system ignores the license settings in this dialog box. This option allows you to turn off licensing for a station, but keep the license settings.

Additional Licenses: If selected, allocates the license to the station. Only purchased licenses display in the list box.

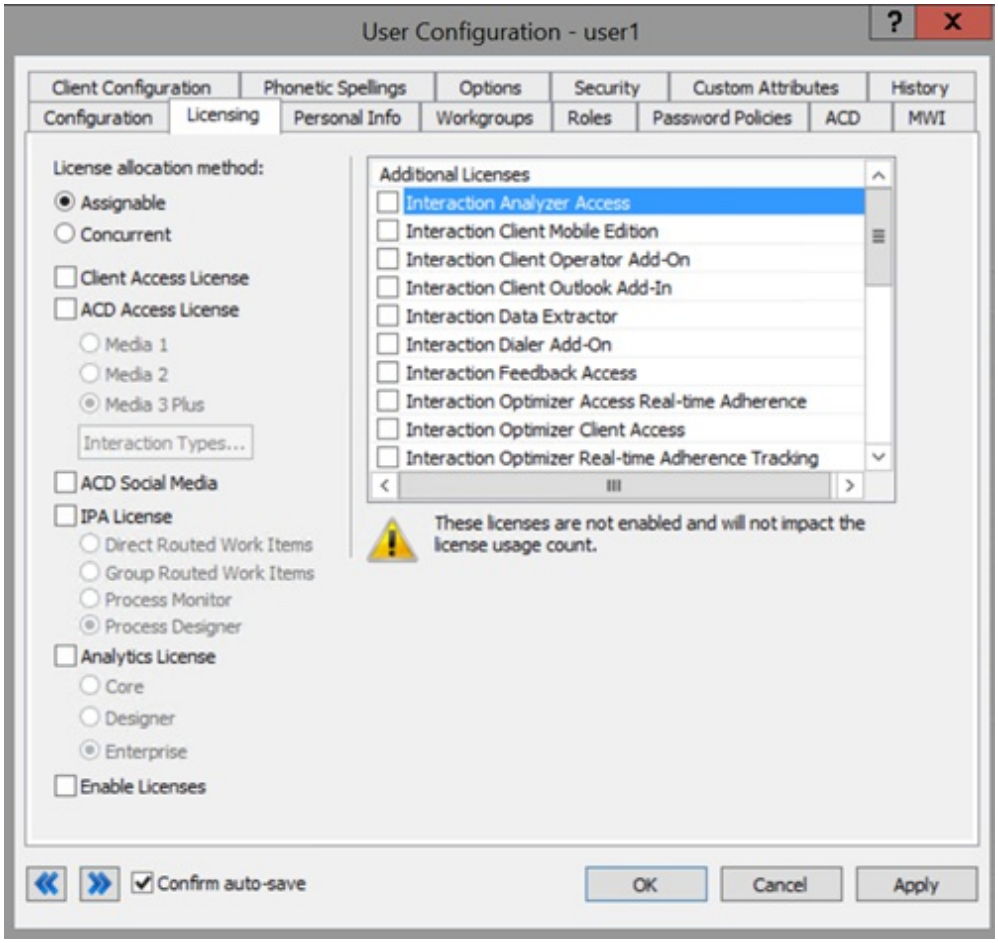
5. Complete the information and then click **OK**.

Allocate Licenses When Modifying a User

The **Licensing** tab in the **User Configuration** dialog box allows you to allocate licenses when modifying a user. For more information, see the *Interaction Administrator Help* at https://help.genesys.com/cic/mergedProjects/wh_ia/desktop/interaction_administrator_help.htm.

To allocate licenses when modifying a user

1. In the right pane of the **Users** subcontainer, double-click the user for which to modify a license. The **User Configuration** dialog box appears.
2. Click the **Licensing** tab.



License allocation method:

Assignable: If selected, the system requires Assignable user and station licenses immediately upon allocation.

Concurrent: If selected, the system requires Concurrent user licenses as needed.

Client Access License: If selected, allocates a Client Access license to the user to allow the user to run an instance of the CIC client software. Without this license allocation, the CIC client cannot run on the station.

ACD Access License: If selected, allocates an ACD Access license to the user. Failure to have an ACD Access license allocated to a station prevents the station from being active in ACD calls.

Media 1: Allows one interaction type at a specified time.

Media 2: Allows two interaction types at a specified time.

Media 3 Plus: Allows three or more interactions at a specified time. Valid Interaction Types are: Call/Callback, Chat, Email, and Generic.

ACD Social Media: If selected, allocates an ACD Social Media license to the user to allow the user to receive routed social media interactions.

IPA License: If selected, allocates an IPA license to the user. If the station is an IPA station, select this license and then specify one of the following license types:

Direct Routing Work Items: (`I3_ACCESS_IPA_USER`) If selected, allows the station to start any process to which the station has rights. It also allows the station to receive Work Items that route to it directly.

Group Routed Work Item: (`I3_ACCESS_IPA_USER_ACD`) If selected, allows the station to receive Work Items that either route to it directly or to a workgroup (similar to an ACD queue.)

Process Monitor: `(I3_ACCESS_IPA_MONITOR)` If selected, allows the user to view process status and details in the Process Monitor or to use Process Reporting in IC Business Manager applications.

Process Designer: `(I3_ACCESS_IPA_DESIGNER)` If selected, allows the user to use the Process Designer to create and modify Interaction Process Automation processes.

Analytics License: If selected, allocates an Analytics license to the user.

Core: If selected,

Designer: If selected,

Enterprise: If selected,

Enable Licenses: If selected, activates the license settings. If cleared, the system ignores the license settings in this dialog box. This option allows you to turn off licensing for a station, but keep the license settings.

Additional Licenses: If selected, allocates the license to the station. Only purchased licenses display in the list box.

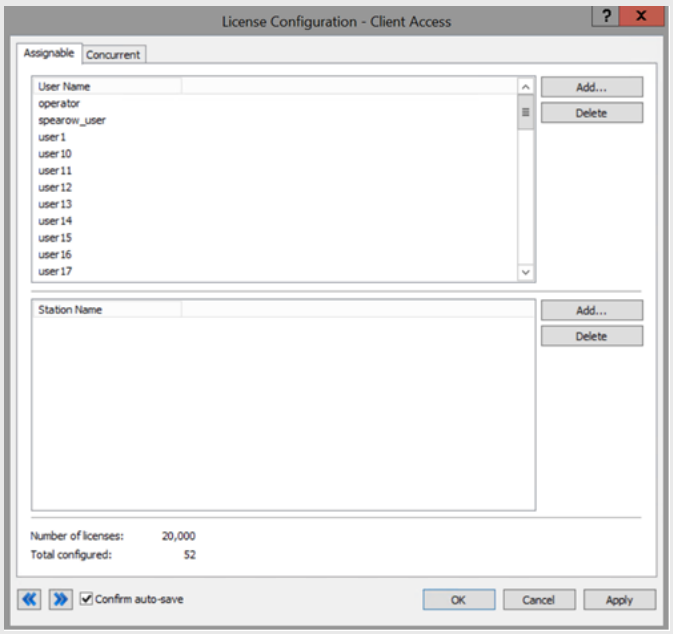
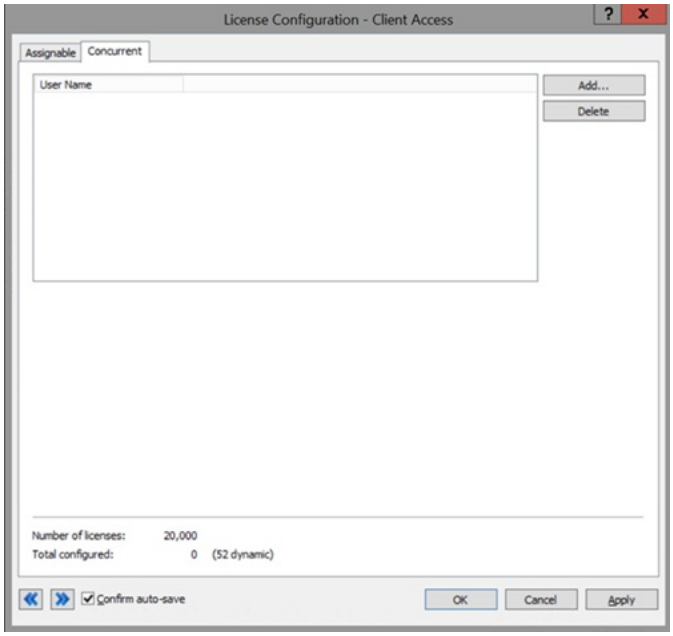
3. Modify the information as necessary and then click **OK**.

Allocate Licenses to Users Through the Licenses Allocation Container

You can configure Access licenses, except Basic Station, as either Assignable or Concurrent when allocating them to users. For more information, see the *Interaction Administrator Help* at https://help.genesys.com/cic/mergedProjects/wh_ia/desktop/interaction_administrator_help.htm.

To allocate a license to a user through the Licenses Allocation Container

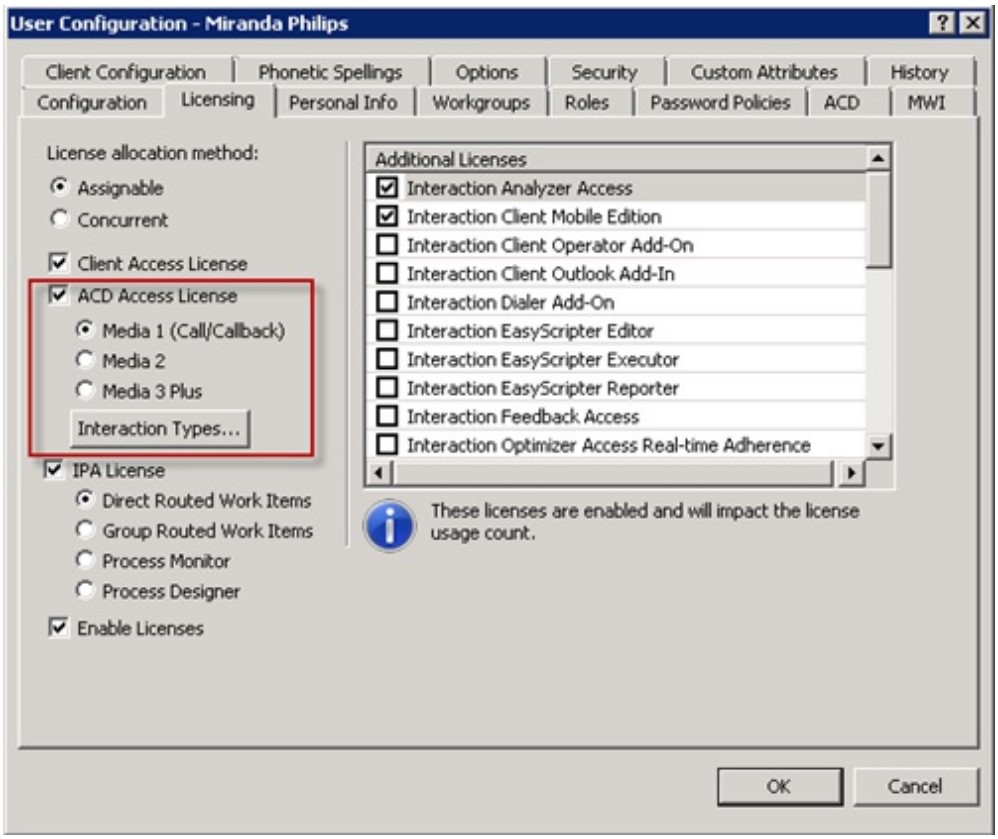
1. In the right pane of the **Licenses Allocation** container, double-click the license to allocate to a user. The **License Configuration** dialog box appears with the **Assignable** tab selected.
2. Do one of the following:

To...	Then...
Allocate the license to users and configure the license as Assignable...	On the **Assignable** tab, click **Add** and select the users to which to allocate the license. 
Allocate the license to users and configure the license as Concurrent...	On the **Concurrent** tab, click **Add** and select the users to which to allocate the license. 

3. Click **OK**.

ACD Workgroup Queues

Agents with an ACD Access License type can participate in ACD workgroup queues, hunt groups, and simultaneous ringing groups. You license CIC ACD users based on how many media that can be in the workgroup queue in which that agent is participating.



The following license rules apply for ACD utilization on the **Licensing** tab:

Media 1: You can choose only one type of interaction to queue to an agent. The agent can participate only in workgroup queues that have only one object type (for example, phone calls) in the queue. Do not put an agent in a workgroup that has a queue with more than one (1) object type routing through that workgroup queue.

Media 2: You can select two types of interactions to queue to an agent. The agent can participate in only workgroup queues that have one or two objects in the queue. Do not put an agent in a workgroup that has a queue with more than two (2) objects routing through that queue.

Media 3: You can select more than two (2) types of interactions to queue to the agent. Agents can be members of any workgroup queue.

The ACD Access license allows a workstation to monitor ACD queues for telephone calls only without the CIC client workstation software. ACD Phone Only workstations don't have licensing for screen pops, unified messaging, faxing, and the ability to start recording or realtime monitoring.

Supervisors can monitor ACD Phone Only workstations in real-time using the Call Center Workstation License.

Notes for ACD Routing of Multimedia

- CIC incorporates licensing for Contact Center 1, 2, and 3 licenses. Ensure in advance that you licensed your agents correctly for the number of media types they handle. If not licensed appropriately, they cannot pick up the interactions they see in the queue.
- If you configure a user with a Media 1 level ACD Access License and the user is a member of a workgroup queue that supports other media types, when the user logs on to the client, the system determines this user doesn't have sufficient licensing to receive all the media types available in the workgroup. A warning message appears, stating that the system limits the ACD interaction types that the user receives until you resolve the licensing problem.
- A warning message appears, for example, when an ACD Media Level 1 user has licensing for emails only, and the user's assigned workgroup requires only calls.
- Users can only process workgroup interactions for their configured interaction types, through IA licensing configuration. For example, a warning message appears to an ACD Media Level 2 user if all the interaction types of the workgroups the user is a member of are not available in the Level 1 or Level 2 user licensing configuration.

For more information about logging on to CIC, see the *Interaction Desktop Help* at https://help.genesys.com/cic/mergedProjects/wh_icde/desktop/client_introduction_idt.htm. For more information about ACD routing, see the *CIC ACD Processing Technical Reference* at help.genesys.com/cic/mergedProjects/wh_tr/desktop/pdfs/acd_processing_TR.pdf.

For more information about phone-only operations, see the *Telephone User Interface Quick Reference* at https://help.genesys.com/cic/mergedProjects/wh_qr/desktop/pdfs/tui_qr.pdf.

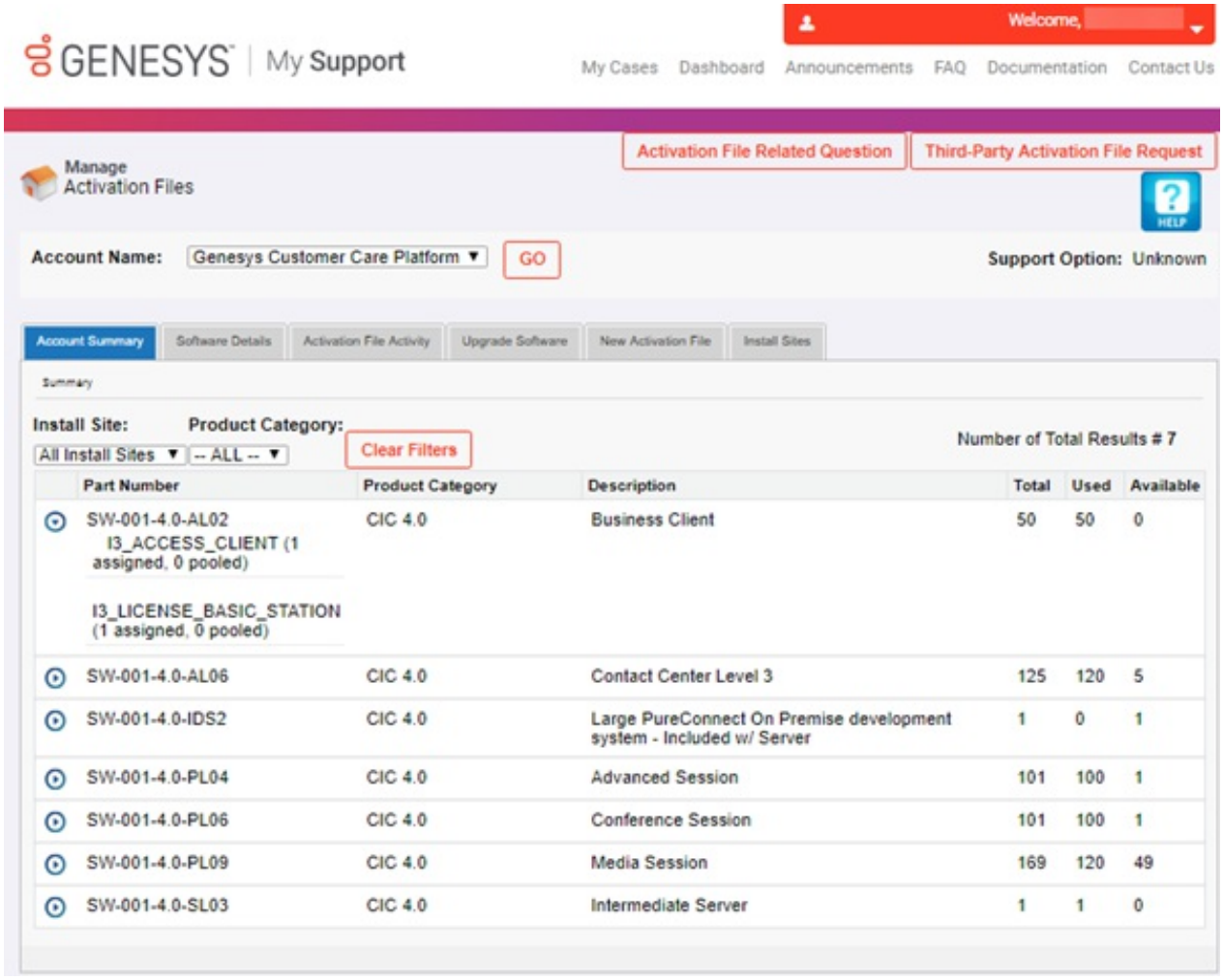
Existing License Update

Update a License

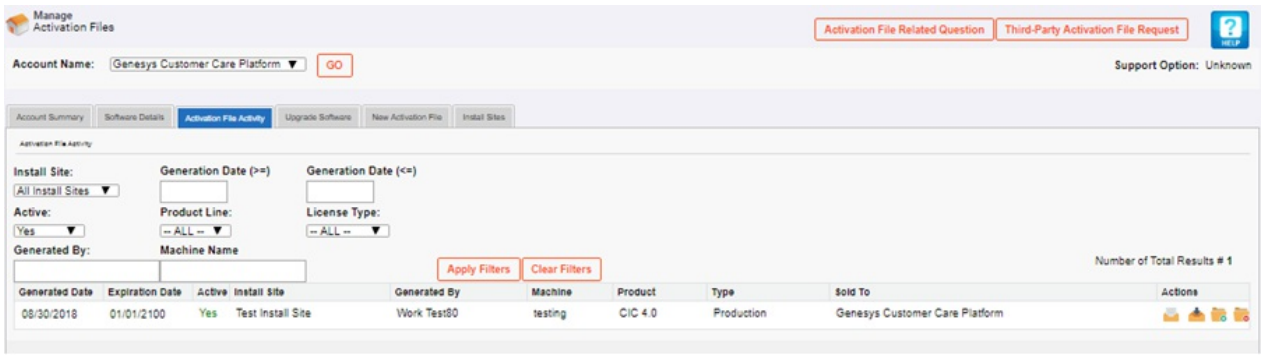
You can update an existing license to increase the number of stations or lines.

To update your license

1. Open the Activation File Management Tool. The **Account Summary** tab appears, with a summary of all ordered items available to license for an account.



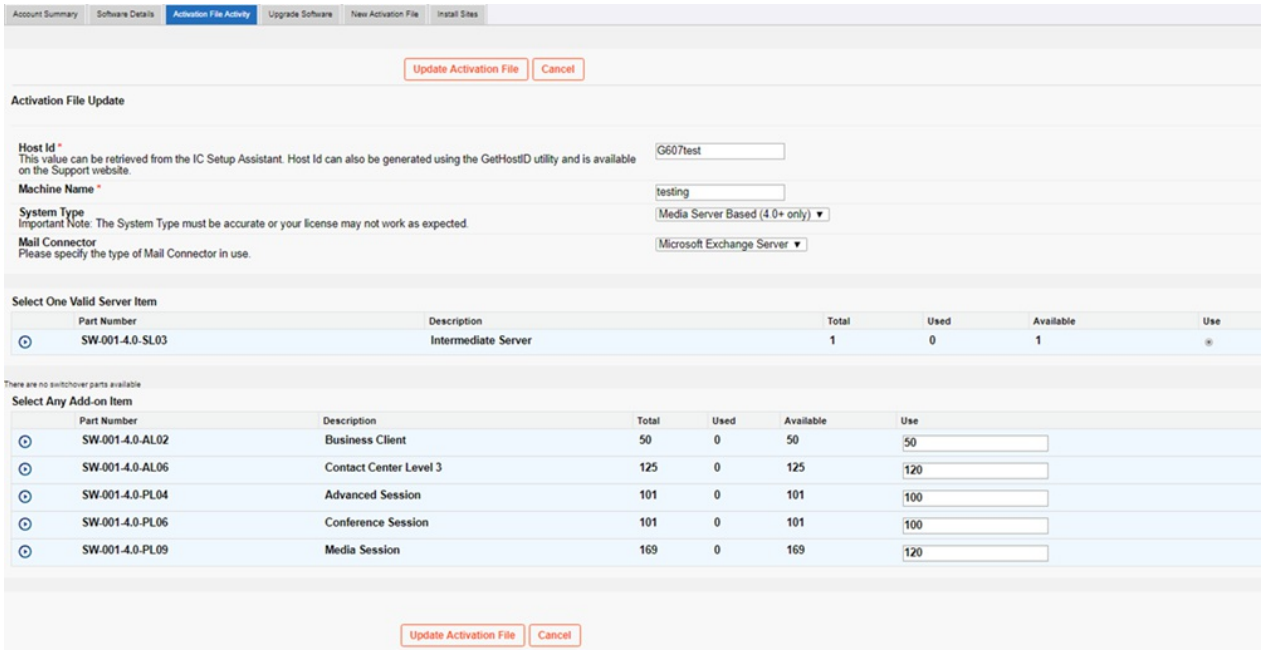
2. Click the **Activation File Activity** tab.



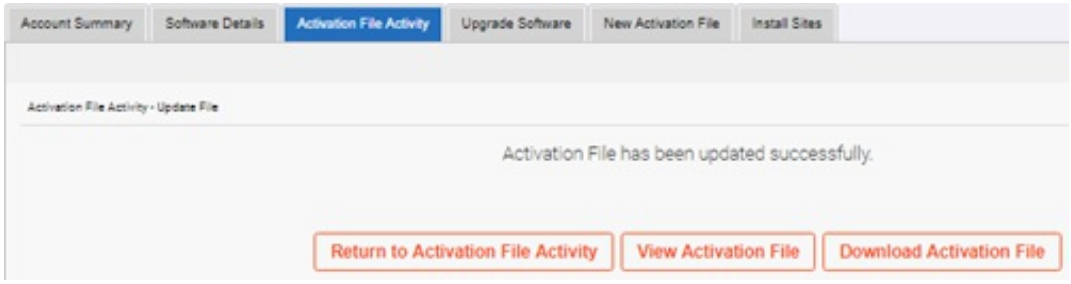
Note: CIC 4.0 Production licenses include the information for both servers in a switchover pair. If you have licensing for switchover and you specified the information for both servers when you generated and downloaded your license, your license shows the Multiple Servers icon beside the server name in the **Machine** column. If you hover over the icon, a pop-up appears with information for both server names.

If you didn't provide the information for the second server in the switchover pair when you generated and downloaded your license, you can specify the information when you update your Production license.

3. In the Actions column, click the Update icon for the license to update. The **Activation File Update** page appears.



4. Update the license information and then click **Update Activation File**. The system updates your licenses and displays a message indicating that the activation file updated successfully.



5. Click **Download Activation File**. The file downloads to your default download folder. The file name extension is "I3Lic".

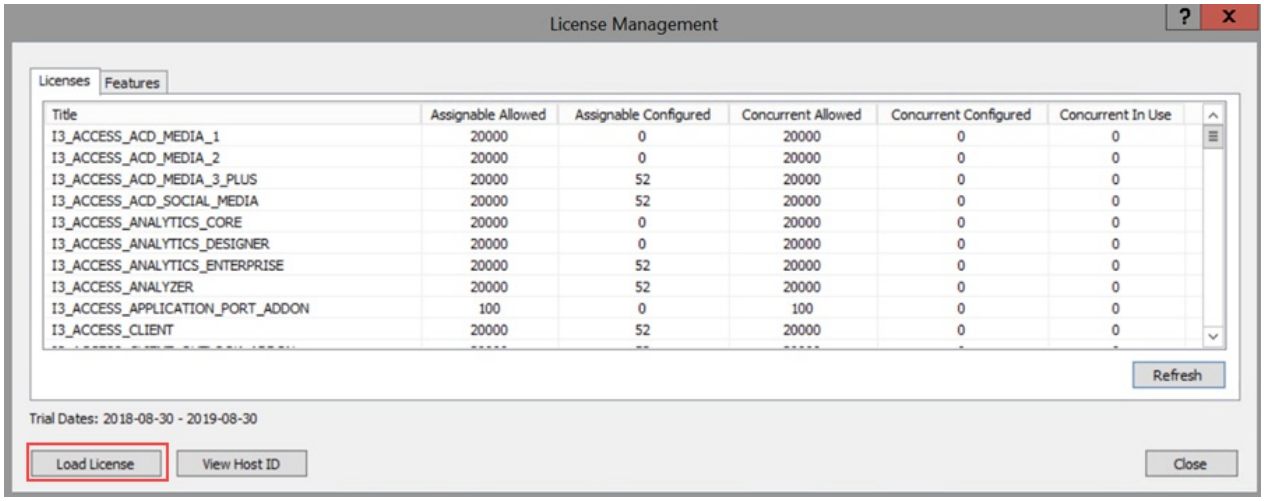
   You are now ready to load the file in Interaction Administrator. For more information, see Load the license file.

Load the License File

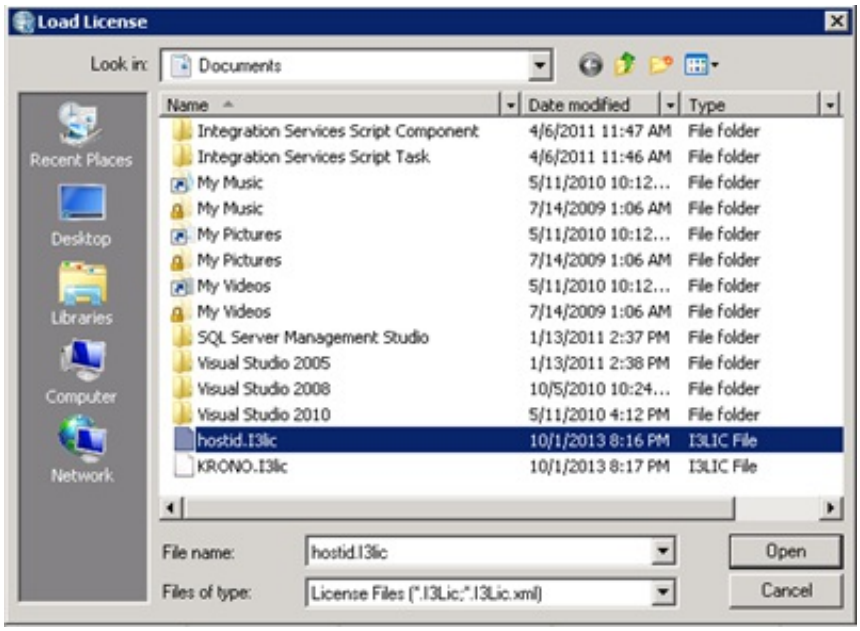
After you update your existing license, you are ready to load the license file.

To load the license file

1. In Interaction Administrator, on the **File** menu, click **License Management**. The **License Management** dialog box appears.



2. Click **Load License**. The **Load License** dialog box appears.



3. In the **File Name** list box, click the name of the license file that you downloaded and then click **Open**. When the license file loads, a confirmation message appears.
4. Click **OK**. The updated license information appears in the **License Management** dialog box.

Note: The switchover subsystem determines that the license file that you created is a switchover bundled license and contains the information for both servers. It replicates the license to the backup server automatically. Check the Windows Application Event log on the primary and backup IC servers to confirm the license applied correctly; if any errors occur, they appear there.

Product Upgrade Request

Existing CIC 4.0 installations do not require any changes to the CIC 4.0 license to upgrade to CIC 2015 R1 or later. You don't have to request a product upgrade to upgrade from CIC 4.0 GA through SU 6 to CIC 2015 R1 or later.

If you are migrating from CIC 2.4 or 3.0 to CIC 2015 R1 or later, see the *CIC Migration Guide* at https://help.genesys.com/cic/mergedProjects/wh_tr/desktop/pdfs/migration_icg.pdf. This guide provides more information about product upgrade requests.

Troubleshooting

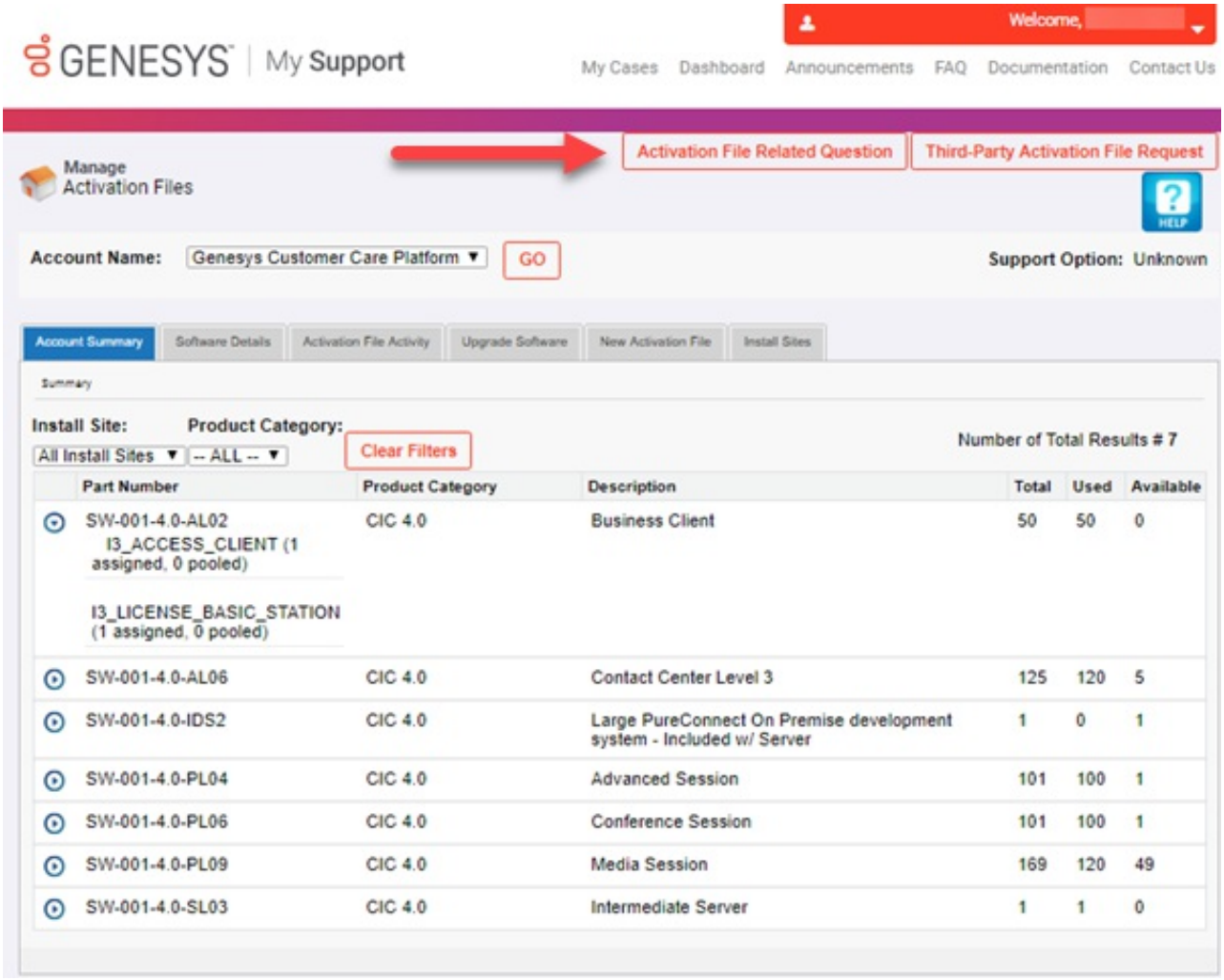
Examples of issues that you may encounter include:

- You confirmed that you are using the correct license file, whether it is an original license or an upgrade license, and the install doesn't continue.
- You cannot locate your license file because the install did not copy it to the `i3IC` directory.

For more information about licensing issues during installation, see the *PureConnect Installation and Configuration Guide* at https://help.genesys.com/cic/mergedProjects/wh_tr/desktop/pdfs/Installation_Configuration_Guide.pdf.

If you have questions concerning the terms of your agreement, contact your reseller.

If you need assistance generating a license, or have a license-related question, click **Activation File Related Question** in the Activation File Management Tool. For more information, see Activation File Management Tool.



Change Log

The following table lists the changes to the *PureConnect Licensing Technical Reference* since CIC 4.0 product availability.

Date	Changes
12-March-2012	Added a reference to the CIC 4.0 License Upgrade Guide
27-June-2012	General edits for UI controls
25-February-2013	Updated Copyright and Trademarks
11-November-2013	Added new content for license types (non-ordered small development, non-ordered large development, ordered small development, ordered large-development). Updated screenshots. Updated formatting and wording as per new template and Acrolinx.
23-April-2014	Minor updates to fix typos
29-July-2014	Updated documentation to reflect changes required in the transition from version 4.0 SU# to CIC 2015 R1, such as updates to product version numbers, system requirements, installation procedures, references to the Product Information site URLs, and copyright and trademark information.
24-September-2014	Updated licensing information for 2015 R1.
12-January-2015	Add table of add-on licenses and descriptions. Updated copyright and trademark information.
03-March-2015	Updated Virtualized Interaction Media server section. Updated copyright and trademark page.
21-August-2015	Updated documentation to reflect the addition of two CIC client applications, Interaction Desktop and Interaction Connect. Updated cover page and screen shots for rebranding.
11-April-2017	Removed reference to Interaction Client .Net Edition and Interaction Client Web Edition.
28-April-2017	Removed reference to Interaction Client Mobile Edition.
15-March-2018	• Rebranded to Genesys. • Added link to "CIC 4.0 License Upgrade Guide" to the "New and discontinued licenses" section.
06-September-2018	• Genesys replaced the License Management System with the Activation File Management Tool. Updated procedures and graphics accordingly. • The anniversary date and re-registration process is no longer applicable because PureConnect now uses perpetual software licenses with an expiration date of 1/1/2100. Removed the "Anniversary date and licensing behavior" and the "Appendix A: License warnings and behavior" sections accordingly.
03-April-2019	Added instructions for requesting an activation file.
24-April-2019	Reorganized the content only, which included combining some topics and deleting others that just had an introductory sentence such as, "In this section...".
07-May-2019	Removed "New CIC Distribution Model and the CIC license" as the model is no longer new.
25-June-2019	Removed the note about physical processor chips on the IC server with different CPUID values from Generate a Production License. Genesys licensing no longer supports adding multiple Host IDs at a physical level for a specific server. For information about this capability at a virtual level, see "Hosts with mismatched CPUs, MAC addresses, and licensing" in the *CIC Virtualization Technical Reference* at https://help.genesys.com/cic/mergedProjects/wh_tr/desktop/pdfs/virtualization_tr.pdf.