PureConnect®

2020 R4

GENESYS™

PureConnect New Installation

Checklists

Abstract

Follow these checklists to perform a new CIC installation. Each summary step contains reference to the PureConnect Installation and Configuration Guide.

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

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Introduction

These checklists summarize the steps in a new installation of Customer Interaction Center (CIC) 2015 R1 or later. Each step refers to a section in this or another document in the PureConnect Documentation Library for detailed instructions. *PureConnect Installation and Configuration Guide* is available in the PureConnect Documentation Library at http://help.genesys.com/cic/.

This document assumes that the CIC installation will be performed entirely at the customer site.

Checklist 1: CIC Server Requirements

This checklist summarizes the requirements and pre-installation procedures for the CIC server.

For details on each step, see the section "CIC server" in *PureConnect Installation and Configuration Guide*.

☐	**Fulfill Windows server requirements** See these sections in "CIC server" in *PureConnect Installation and Configuration Guide*: • "CIC server minimum hardware requirements" • "Recommendations for typical large-scale CIC implementations" • "Virtualization" • "CIC server software requirements" • "CIC server configuration recommendations pre- and post-Windows OS installation" • "Recommended third party tools" • "Anti-virus requirements and Best Practices" • "PureConnect QoS driver" • "Security-related settings"
☐	**Create and configure the CIC administrator account** • Create a CIC administrator domain user account • Give the CIC administrator account local privileges See "Create and configure the CIC administrator account" in "CIC server" in *PureConnect Installation and Configuration Guide*.
☐	**(Optional) Install the email client** • Microsoft Exchange (EWS) and Novell GroupWise do not require an email client on the CIC server. • If you use Microsoft Exchange (MAPI) or IBM Domino/Notes, see "Mail System" in *PureConnect Installation and Configuration Guide* for instructions on installing and configuring an email client on the CIC server to access the CIC administrator account on the mail server.
☐	**Plan license assignment and allocation** We recommend that you plan **Basic Station license** and **Client Access/ACD Access license** assignment and allocation prior to the installation. See: • "Licensing" in "Getting Started" in *PureConnect Installation and Configuration Guide*. • *PureConnect Licensing Technical Reference* in the PureConnect Documentation Library.

☐ Order and generate the CIC 4.0 license

(Two weeks prior to the installation)

Make sure you are familiar with CIC licensing. The license defines what version, Server Features, Basic Station and Access license components, plus any additional license components, and quantities are included in your agreement.

Order and generate the CIC 4.0 license from the Activation File Management Tool site at https://genesyspartner.force.com/customercare/GenesysCommunityLogin.

See:
- "Licensing" in "Getting Started" in *PureConnect Installation and Configuration Guide*.
- "Order and generate the CIC 4.0 license" in "CIC server" in *PureConnect Installation and Configuration Guide*.
- *PureConnect Licensing Technical Reference* in the PureConnect Documentation Library.

☐ (Optional) Install SNMP

See:
- "Install SNMP" in "CIC server" in *PureConnect Installation and Configuration Guide*.
- *CIC and SNMP Technical Reference* in the PureConnect Documentation Library.

☐ (Optional) Complete a Pre-Install survey

We recommend that you complete a Pre-Install survey prior to the installation to compile all the installation and configuration information needed for the customer site.

The IC Survey System is located in `\Additional Files\IC Survey System` on the CIC 2015 R1 or later `.iso` file.

See "IC Survey System" in "CIC server" in *PureConnect Installation and Configuration Guide*.

Checklist 2: Media Server Requirements

This checklist summarizes the requirements and pre-installation procedures for Interaction Media Server.

For details on each step, see "Media Servers" in *PureConnect Installation and Configuration Guide*.

☐	**Install and configure Interaction Media Server**
	Interaction Media Server is a required CIC subsystem. Interaction Media Server handles all CIC audio needs, including Voice-over-IP (VoIP) active call connections, recordings, and playing prompts.
	Interaction Media Server can be installed before or after the CIC server installation.
	After the CIC server installation is completed, configure Interaction Media Server. At least one Interaction Media Server must be configured to work with the CIC server before the CIC system can be tested to ensure basic functionality.
	See:
	• "Interaction Media Server" in "Media Servers" in *PureConnect Installation and Configuration Guide*.
	• *Interaction Media Server Technical Reference* in the PureConnect Documentation Library.

Checklist 3: Client Workstation Requirements

This checklist summarizes the requirements and pre-installation procedures for client workstations.

For details on each step, see "Client Workstation" in *PureConnect Installation and Configuration Guide*.

☐	**Review client workstation hardware requirements** See: "Client workstation hardware requirements" in "Client Workstation" in *PureConnect Installation and Configuration Guide*.
☐	**Fulfill client workstation software requirements** Review and fulfill requirements for: • Operating system • Microsoft .NET Framework See: "Client workstation software requirements" in "Client Workstation" in *PureConnect Installation and Configuration Guide*.
☐	**Install email client on client workstations** If you wish to provide users with CIC's unified messaging feature on an email client, install the appropriate email client on client workstations: • Microsoft Outlook • IBM Notes • Novell GroupWise See "Email client" in "Client Workstation" in *PureConnect Installation and Configuration Guide*.
☐	**Ensure installer has administrative privileges on client workstations** See "Administrative privileges" in "Client Workstation" in *PureConnect Installation and Configuration Guide*.
☐	**Review IC User Applications (32-bit and 64-bit) install components** See "Interaction Desktop" in "Client Workstation" in *PureConnect Installation and Configuration Guide*.
☐	**Fulfill additional requirements needed for client workstation applications** See in "Client Workstation" in the *PureConnect Installation and Configuration Guide*: • "Additional requirements for IC User Applications" • "Additional requirements for IC Business Manager Applications" • "Additional requirements for IC Server Manager Applications"

Checklist 4: Additional Server Requirements

This checklist summarizes additional servers that may be part of your CIC implementation and refers to other documents for further information.

☐	**Directory server** The PureConnect platform runs in a Windows Server 2019, Windows Server 2016, and Windows Server 2012 R2. Windows domains require directory servers to store the Active Directory. See "Additional Servers" in *PureConnect Installation and Configuration Guide*.
☐	**Switchover** CIC supports an automated switchover system with duplicate CIC servers. See *Automated Switchover System Technical Reference* in the PureConnect Documentation Library.
☐	**DHCP server** While DHCP is not directly used by CIC, the service is used by many of the devices which connect to CIC. Additional configuration options can be provided using DHCP to provide functionality for features such as automated provisioning for managed IP phones. See *CIC Managed IP Phones Administrator's Guide* in the PureConnect Documentation Library.
☐	**DNS server** Like DHCP, DNS is not directly used by CIC, however it does provide functionality which allows various devices that connect to CIC to support features such as Switchover and TLS/STRP. Also like DHCP, DNS is used for automated provisioning for managed IP phones. See *CIC Managed IP Phones Administrator's Guide* in the PureConnect Documentation Library.
☐	**Web server** The addition of a Web Server allows CIC to interact with both users and external customers via a web browser. This can include the provision of Web chat sessions as well as client functionality for computer hardware which either does not have the appropriate software loaded or which runs an operating system for which Genesys has not provided native software. See "Additional Servers" in *PureConnect Installation and Configuration Guide*.
☐	**ASR server** PureConnect offers trusted speech recognition solutions using vendor ASR software. Integrating PureConnect technology with these speech applications offers major speech recognition benefits, including excellent accuracy, powerful standards-based features, optimized performance, and best caller experience. See: ● "Additional Servers" in *PureConnect Installation and Configuration Guide*. ● *ASR Technical Reference* in the PureConnect Documentation Library.

☐	**TTS server** The PureConnect platform uses a Text-to-Speech (TTS) engine to read text to callers over the telephone. For example, a CIC user can retrieve an email over the phone, and the TTS engine will read sender, subject, and body of the email. A variety of Speech Application Programming Interface (SAPI) compliant and Media Resource Control Protocol (MRCP) compliant TTS engines are supported. See: • "Additional Servers" in the *PureConnect Installation and Configuration Guide*. • *Text to Speech Technical Reference* in the PureConnect Documentation Library.

Checklist 5: Mail System Requirements

This checklist summarizes the requirements and pre-installation procedures for the mail system.

For details on each step, see "Mail System" in *PureConnect Installation and Configuration Guide*.

☐	**Review email server recommendations that apply to all email servers** See "Email server recommendations" in "Mail System" in *PureConnect Installation and Configuration Guide*.
☐	**Review email security solutions apply to all email servers** • SSL/TLS • S/MIME See "Email security" in "Mail System" in *PureConnect Installation and Configuration Guide*.

☐

Fulfill mail system requirements

- **Microsoft Exchange (EWS)**

  - Supported Exchange servers
  - Set **Exchange permissions** for EWS
  - Configure CIC for EWS on new installations
  - Migrate MAPI to EWS on existing installations

- **Microsoft Exchange (MAPI)**

  - Supported Exchange servers
  - Define **CIC administrator permissions** for Exchange
  - Create **address and distribution lists** for user import
  - Configure **Outlook client** on CIC server
  - Configure CIC for MAPI
  - **Exchange calendar access** for Exchange 2007 only

- **IBM Domino**

  - Supported IBM Domino servers
  - Define **CIC administrator permissions** on IBM Domino server
  - Install and configure **Notes client** on CIC server
  - Configure CIC for IBM Domino/Notes

- **Novell GroupWise**

  - Supported GroupWise servers:
  - Configure the **GroupWise POA(s) for SOAP**
  - Generate the **Trusted Application file**
  - Configure CIC for GroupWise

- **Gmail (Google Apps for Business)**

  - Configure CIC for Gmail

- **LDAP/SMTP/IMAP services**

  - Supported LDAP/SMTP/IMAP servers
  - Configure CIC for LDAP/SMTP/IMAP

- **Interaction Message Store (basic voice mail and fax retrieval services)**

  - Configure CIC for Interaction Message Store
  - Interaction Message Store and virus scanning

See the sections on each mail system in "Mail System" in *PureConnect Installation and Configuration Guide* in the PureConnect Documentation Library.

☐ **Review mail system information required for CIC installations**

See "Required mail system information" in "Mail System" in *PureConnect Installation and Configuration Guide*.

Checklist 6: Database Server Requirements

This checklist summarizes the requirements and pre-installation procedures for the database server.

For details on each step, see "Database Server" in *PureConnect Installation and Configuration Guide*.

☐	**Review general CIC Database Configuration information** See "CIC Database Configuration", "Reporting tables, etc." in "Database Server" in *PureConnect Installation and Configuration Guide*.

☐	**Fulfill database server requirements**
	
	• **SQL Server**
	
	  ○ Supported SQL Servers
	  ○ Configure SQL Server for **Mixed Authentication Mode**
	  ○ SQL Server **security settings**
	  ○ SQL Server **ODBC driver**
	  ○ SQL Server **database space planning**
	  ○ SQL Server **configuration**
	  ○ SQL Server **database maintenance**
	  ○ **CIC Database Configuration options** for SQL Server
	
	• **Oracle**
	
	  ○ Supported Oracle servers
	  ○ Oracle **security settings**
	  ○ Oracle **ODBC driver/Oracle client** requirements
	  ○ **Tablespace** planning
	  ○ Oracle **configuration**
	  ○ Oracle **database maintenance**
	  ○ **CIC Database Configuration options** for Oracle
	
	See the sections on each database server in "Database Server" in *PureConnect Installation and Configuration Guide*.

☐	**Review data retention topics that apply to all database servers** See "Data retention" in "Database Server" in the *PureConnect Installation and Configuration Guide*.
☐	**Review database administrator account information required for CIC installations** See "Required database information" in "Database Server" in the *PureConnect Installation and Configuration Guide*.

Checklist 7: CIC Server Installation

This checklist summarizes the steps in a new CIC server installation for CIC 2015 R2 and later.

For details on each step, see "CIC Server Installation" in *PureConnect Installation and Configuration Guide*.

☐	## Step 1: Download and copy the CIC `.iso` to a file server CIC 2015 R1 and later releases are distributed as `.iso` files. We recommend that you store the CIC release `.iso` file on a file server to avoid having to copy the `.iso` file to multiple servers. See "Step 1: Download and copy the CIC `.iso` file to a file server" in "CIC Server Installation" in *PureConnect Installation and Configuration Guide*.
☐	## Step 2: Verify CIC server prerequisites Verify that you have fulfilled all the prerequisites for the CIC server and IC Setup Assistant. See "Step 2: Verify CIC server prerequisites" in "CIC Server Installation" in *PureConnect Installation and Configuration Guide*.
☐	## Step 3: Run Install.exe We recommend installing CIC releases using `Install.exe`, located in the `\Installs` directory on the `.iso` share. `Install.exe` is an enhanced tool that simplifies and automates many aspects of the manual install and update process. See "Step 3: Run Install.exe" in "CIC Server Installation" in *PureConnect Installation and Configuration Guide*.
☐	## Step 4: Load the CIC license file Starting with CIC 2015 R2, `Install.exe` prompts for and loads the CIC license file prior to installing the selected install components. See "Step 4: Load the CIC license file" in "CIC server Installation" in *PureConnect Installation and Configuration Guide*.
☐	## Step 5: CIC server install You must be logged in as a user with administrator privileges on the CIC server in order to run the CIC server install. For instructions, see "Step 5: CIC server Install" in "CIC server Installation" in *PureConnect Installation and Configuration Guide*.
☐	## Step 6: PureConnect Documentation Library install The PureConnect Documentation Library contains all available CIC help systems, installation and configuration guides, technical reference documents, and quick reference materials in a single searchable unit. See "Step 6: PureConnect Documentation Library install" in "CIC server Installation" in *PureConnect Installation and Configuration Guide*.

Step 7: Interaction Text-to-Speech

The Interaction Text to Speech is an integrated component of Interaction Media Server and is installed through the Media Server installation. This install adds language models for newly supported languages.

See "Step 7: Interaction Firmware install" in "CIC server Installation" in *PureConnect Installation and Configuration Guide*.

Step 8: Interaction Firmware install

The Interaction Firmware install contains the latest supported firmware for Polycom, Interaction SIP Station, AudioCodes, and Genesys managed IP phones.

See "Step 8: Interaction Firmware install" in "CIC server Installation" in *PureConnect Installation and Configuration Guide*.

Step 9: Interactive Update Provider Install

The Interactive Update Provider installation program installs the Interactive Update Provider service and the Interaction Update Client service on the CIC server.

See "Step 9: Interactive Update Provider install" in "CIC server Installation" in *PureConnect Installation and Configuration Guide* and *Interactive Update Technical Reference*.

Step 10: Restart to complete the installation

When you have installed all the selected components, `Install.exe` prompts you to reboot to complete the installation.

See "Step 10: Restart to complete the installation" in "CIC server Installation" in *PureConnect Installation and Configuration Guide*.

Step 11: Apply the latest patch

After running the CIC 2015 R1 or later release installation on the CIC server, apply the latest patch for the release.

See "Step 11: Apply the latest patch" in "CIC server Installation" in *PureConnect Installation and Configuration Guide*.

Step 12: Launch IC Setup Assistant

IC Setup Assistant is a wizard that configures the CIC server. We recommend that you run IC Setup Assistant immediately following the CIC server install.

See Checklist 8: IC Setup Assistant in this document for the selections to make in IC Setup Assistant.

Step 13: Post- installation tasks

- Complete CIC server configuration in Interaction Administrator
- Configure Interaction Media Server (or install it first if necessary)

See "Step 13: Post-IC Server installation" in "CIC server Installation" in *PureConnect Installation and Configuration Guide*.

Checklist 8: IC Setup Assistant

This checklist shows the selections to make in IC Setup Assistant to configure the CIC server. For details on each step, see "IC Setup Assistant" in *PureConnect Installation and Configuration Guide* or IC Setup Assistant help.

> **Note:** See "Prepare for IC Setup Assistant" in "IC Setup Assistant" in *PureConnect Installation and Configuration Guide* for required and optional tasks to be completed prior to running IC Setup Assistant.

☐	**Welcome** Click the checkbox to continue.
☐	**Starting CIC Subsystems** Please wait while some essential CIC subsystems are started.
☐	**Create or load an existing IC Survey File** If an IC Survey file was created prior to running IC Setup Assistant, screens will be pre-filled with the appropriate configuration information.
☐	**Confirm the CIC Administrator Account and Password**
☐	**Confirm the Domain**
☐	**Select the License File** As part of running the New Installation Task List, you should have already downloaded your CIC 4.0 license to the CIC server. If IC Setup Assistant does not detect it, browse to the correct location. When a valid CIC 4.0 license file is loaded, the screen registers that it is a CIC license.
☐	**Select the Dial Plan** If you choose to: • Import an existing dial plan, you may be prompted to **Localize the Dial Plan Import File**. • Create a new dial plan; you are prompted to **Enter Local Area Codes**, and **Enter Local Exchanges**. See the appropriate section describing these screens in "IC Setup Assistant" in *PureConnect Installation and Configuration Guide*, or click **Help**.

Configure the Database

The **Select a Reporting Option** screen appears. If you choose to store reporting data in a database, the following additional screens appear:

- **Database Configuration** - You can choose to configure a **Microsoft SQL Server** or **Oracle** database.
- **Select the Microsoft SQL Server** (or Oracle Server)
- **Configure the CIC Database Name**
- **Configure the SQL** (or Oracle) **CIC Database Accounts**
- **Configure the SQL Database Files** (or Oracle Tablespaces)

For database requirements, see "Database Server" in *PureConnect Installation and Configuration Guide*.

See the appropriate section describing these screens in "IC Setup Assistant" in *PureConnect Installation and Configuration Guide*, or click **Help**.

Select CIC Optional Components

You can select to configure:

- **Switchover Service** Select this option if your implementation requires the Switchover server for failover support. Additional Switchover configuration screens will follow.
- **Multi-Site** Select this option if this server will participate in an Interaction Multi-Site configuration. Additional Multi-Site configuration screens will follow.
- **TFTP Server** Select this option if you plan to configure Interaction SIP Station phones as part of a managed IP phones implementation.

For more information, see "Select CIC Optional Components" in "IC Setup Assistant" in *PureConnect Installation and Configuration Guide*, or click **Help**.

Enter Site Information

Enter site information that Interaction Tracker and other CIC components require.

(optional) Change the Site Name

Certificate Signing Option

Select one of the following options:

- **Sign intermediate and child certificates with the Certificate Authority installed on your CIC server.** Select this option to use the generated certificates and private keys signed by CIC.
- **Create Certificate Signing Requests to be signed by an external Certificate Authority and imported into your IC Server.** Select this option to use certificates signed by a third-party certificate authority.
- **Use a single server certificate for all certificate uses.** Select this option to use a single server certificate for all certificate use types.
- **Use existing certificates and private keys. Do not create or import new certificates or private keys.** Select this option if you prefer to leave the current certificate structure as is.
- **Select Master Key.** Select this button to indicate the master certificate and private key to use to encrypt the certificate folder.

For more information, see "Certificate Signing Options" in "IC Setup Assistant" in *PureConnect Installation and Configuration Guide*, or click **Help**.

☐

Interaction Recorder Compressed Files Location

Appears if the site has an Interaction Recorder feature license. Skip this screen if the license does not include Interaction Recorder.

Otherwise, configure Interaction Recorder in the **Interaction Recorder Compressed Files Location** screen.

For Interaction Recorder requirements, see:
- "Optional Installations and Additional Functionality" in *PureConnect Installation and Configuration Guide*
- *Interaction Recorder and Quality Manager Technical Reference*

See the appropriate section for describing this screen in "IC Setup Assistant" in *PureConnect Installation and Configuration Guide*, or click **Help**.

☐

Speech Recognition configuration

Appears if the site has a Speech Recognition feature license. Skip this screen if the license does not include Speech Recognition.

Otherwise, select the type of speech recognition engine(s) that your site uses:
- Loquendo Automatic Speech Recognition (ASR)
- Nuance Recognizer
- MRCP
- Interaction Speech Recognition

In order to use speech recognition, the ASR server(s) must be installed and configured to communicate with the CIC server. See:
- "Optional Installations and Additional Functionality" in *PureConnect Installation and Configuration Guide*
- *ASR Technical Reference*.
- *Interaction Speech Recognition Technical Reference*

☐

Select Mail Provider

In the **Select Mail Providers** screen, you can choose to configure:
- Interaction Message Store
- Microsoft Exchange (EWS and/or MAPI)
- IBM Domino Server
- Novell GroupWise Server
- Other (LDAP, SMTP, or IMAP) select if you are using **Gmail**

Depending on the selected mail provider(s), you may be prompted for additional configuration screens.

For mail system requirements, see "Mail System" in *PureConnect Installation and Configuration Guide*.

See the appropriate sections describing these screens in "IC Setup Assistant" in *PureConnect Installation and Configuration Guide*, or click **Help**.

In **Mail Provider Summary**, verify that your entries are correct.

☐

Log Retrieval Assistant Mailbox configuration

You can select to configure Log Retrieval Assistant, a feature that allows support organizations and certified partners to configure logging and retrieve logs from CIC servers.

See *Log Retrieval Assistant Customer Site Technical Reference*.

☐ **SIP Lines and Default Registration Group**

IC Setup Assistant makes SIP line configuration and managed IP phone configuration easier by creating:
- A **SIP line for station-to-station calls** in three different transport protocols: TCP (default), UDP, and TLS.
- **Default Registration Groups** for the TCP and TLS lines.

These pre-configured settings become useful when you create SIP lines and managed IP phones and associated SIP stations in Interaction Administrator, post-installation.

For more information, see "SIP Lines and Default Registration Group" in "IC Setup Assistant" in *PureConnect Installation and Configuration Guide*, or click **Help**.

☐ **Configure Stations**

> **Note:** If you plan to implement **managed IP phones**, skip the Configure Stations screen. You will create managed IP phones and associated SIP stations post-installation in Interaction Administrator with Managed IP Phone Assistant.

You can choose to launch **Add Stations Assistant** to create multiple SIP stations for non-managed IP phones and/or stand-alone fax machines.

See the appropriate sections describing these screens in "IC Setup Assistant" in *PureConnect Installation and Configuration Guide*, or click **Help**.

☐ **Create CIC User Accounts**

You can choose to launch **Add Users Assistant** to create multiple user accounts.

Users can be imported from mail server distribution lists, Windows users, or a CSV user list. The Add Users Assistant also sets extensions and passwords for CIC user accounts imported from a mail server or Windows domain accounts.

See the appropriate sections describing these screens in "IC Setup Assistant" in *PureConnect Installation and Configuration Guide*, or click **Help**.

☐ **Configure Workgroups**

Appears if you created users with a CSV user list or Add Users Assistant.

Review or modify existing workgroups or specify new workgroups.

See the appropriate section describing this screen in "IC Setup Assistant" in *PureConnect Installation and Configuration Guide*, or click **Help**.

☐ **Configure Role Memberships**

Appears if you created users with a CSV user list or Add Users Assistant.

Review or modify existing role memberships, or specify new role memberships.

See the appropriate section describing this screen in "IC Setup Assistant" in *PureConnect Installation and Configuration Guide*, or click **Help**.

☐	## Configure Auto-Attendant menu IC Setup Assistant generates a default auto-attendant menu with "out-of-the-box" features. You can choose to configure and incorporate the following in the auto-attendant menu: - **Default hours of operation** - **Group call processing for ACD workgroups** See the appropriate sections describing these screens in "IC Setup Assistant" in *PureConnect Installation and Configuration Guide*, or click **Help**.
☐	## Configure DCOM Security Limits In order for the CIC server's DCOM components to function correctly and in a secure manner, Windows' DCOM security permissions must be modified to include the domain accounts of all CIC users. Select the level of security needed for your site. The recommended level is to allow authenticated users (medium security). See the appropriate section describing this screen in "IC Setup Assistant" in *PureConnect Installation and Configuration Guide*, or click **Help**.
☐	## Commit your choices Select **Yes, I want to restart my computer now** to complete the CIC server configuration. See the appropriate section describing this screen in "IC Setup Assistant" in *PureConnect Installation and Configuration Guide*, or click **Help**.

Checklist 9: Post-Installation Configuration

After the CIC server installation (including IC Setup Assistant) is completed and you have **configured at least one Interaction Media Server**, perform basic post-installation tasks summarized in this checklist and test for basic functionality. Most of the post installation configuration is done in Interaction Administrator.

For details on each step, see "Post-Installation Configuration" in *PureConnect Installation and Configuration Guide*. Also see *Interaction Administrator help*.

☐	## Master Administrator configuration Verify Master Administrator permissions, assign full client privileges for the CIC Administrator user, and set up a Master Administrator mailbox. See "Master Administrator configuration" in "Post-Installation Configuration" in *PureConnect Installation and Configuration Guide* and *Interaction Administrator help*.
☐	## Configure SIP lines Configure the lines needed for SIP implementations in the Interaction Administrator **Lines** container: • **SIP lines for station-to-station calls and registration groups**. When you ran IC Setup Assistant, you entered information in the SIP Lines and Default Registration Group screen for the three default SIP station lines for station-to-station calls (<Stations-TCP>, <Stations-UDP>, and <Stations-TLS>), and default registration groups for managed IP phones for the <Stations-TCP> and <Stations-TLS> lines. When you open the **Lines** container, these three lines are present. You may wish to use one or more of these lines, depending on your implementation, and/or configure them further. • **SIP line(s) for outbound calls**. Create SIP line(s) for outbound calls in the **Lines** container. See "Configure SIP Lines" in "Post-Installation Configuration" in *PureConnect Installation and Configuration Guide* and *Interaction Administrator help*.
☐	## Create Line Groups Create one or more line groups for dial groups and reporting. See "Configure Line Groups" in "Post-Installation Configuration" in *PureConnect Installation and Configuration Guide* and *Interaction Administrator help*.
☐	**Create managed IP phones and associated SIP stations** Create managed IP phones and associated SIP stations for the Polycom phones, Interaction SIP Station phones, SIP Soft Phones, AudioCodes, and Genesys phones in your implementation. The *CIC Managed IP Phones Administrator's Guide* provides the complete instructions for creating managed IP phones and associated SIP stations, including: • Configure the network for managed IP phones • Create individual managed IP phones for test purposes • Create multiple managed IP phones using a CSV Managed IP Phone list • Polycom administration: Additional configuration, troubleshooting, and boot and provision sequences • Interaction SIP Station administration: Set up, additional configuration, troubleshooting, and boot and provision sequences • SIP Soft Phone: Setup and configuration, troubleshooting, and setup and provision sequences • AudioCodes and Genesys administration: Additional configuration, troubleshooting, and boot and provision sequences • How registrations work (proxy settings)

Verify or create non-managed SIP stations

Review station configuration in the Interaction Administrator **Stations** container for **non-managed SIP stations and stand-alone fax machines** created in IC Setup Assistant with Add Stations Assistant.

If you did not create stations for non-managed SIP stations when you ran IC Setup Assistant, create them now in the Interaction Administrator **Stations** container, using **Add Stations Assistant** or create them individually.

See "Verify or create non-managed SIP stations" in "Post-Installation Configuration" in *PureConnect Installation and Configuration Guide* and *Interaction Administrator help*.

Verify or create users

Review user configuration in the Interaction Administrator **Default User** and **Users containers**. Ensure each user created when you ran IC Setup Assistant is allocated a station, extension, password, and mailbox, and belongs to the appropriate workgroups and roles.

If you did not create users when you ran IC Setup Assistant, create them now in the Interaction Administrator **Users** container in **Add Users Assistant** or create them individually.

See "Verify or create users" in "Post-Installation Configuration" in *PureConnect Installation and Configuration Guide* and *Interaction Administrator help*.

Allocate Access licenses

If you have not yet assigned Client Access licenses and ACD Access licenses to stations and users, do so now in the Interaction Administrator **License Allocation** container.

You can also allocate stations in the Basic Station license.

See "Licensing" in "Getting Started" and "Allocate Access licenses" in "Post-Installation Configuration" in *PureConnect Installation and Configuration Guide*.

For more detailed information, see the *PureConnect Licensing Technical Reference*.

Verify or create workgroups

Review workgroup configuration in the Interaction Administrator **Workgroups** container. Ensure that the workgroups created when you ran IC Setup Assistant are assigned extensions and alerting options and contain the appropriate members.

If you did not create workgroups when you ran IC Setup Assistant, create them now in the **Workgroups** container.

See "Verify or create workgroups" in "Post-Installation Configuration" in *PureConnect Installation and Configuration Guide* and *Interaction Administrator help*.

Verify or create roles

Review roles configuration in the Interaction Administrator **Roles containe**r. Ensure that the default roles and any new roles you created when you ran IC Setup Assistant contain the appropriate members.

If you did not create roles when you ran IC Setup Assistant, create them now in the **Roles** container.
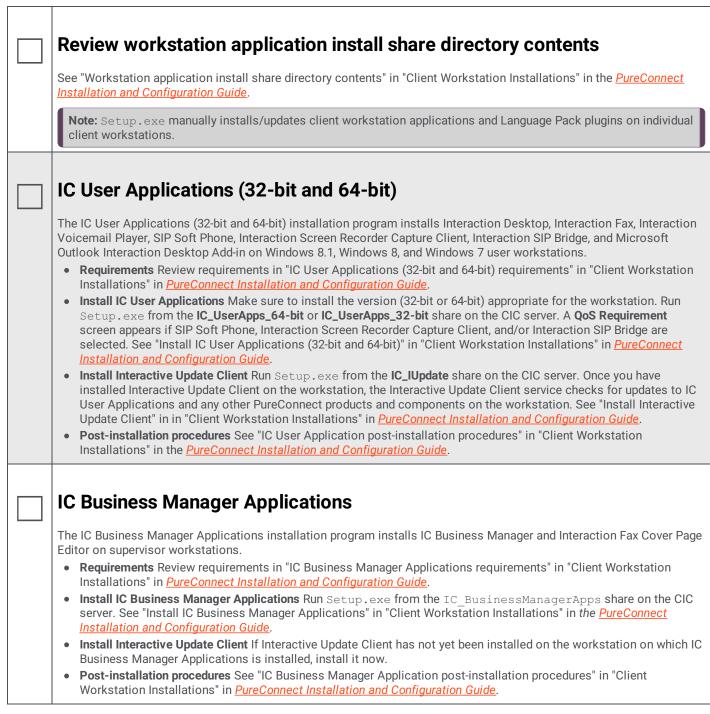
See "Verify or create roles" in "Post-Installation Configuration" in *PureConnect Installation and Configuration Guide* and *Interaction Administrator help*.

☐	Verify or create the dial plan CIC supports two dial plans: • The **regional dial plan**, enhanced for SIP. The regional dial plan has an `.i3dplan` extension. • The **old dial plan** has an `.i3pnum` extension. Verify the **dial plan** created when you ran IC Setup Assistant in the Interaction Administrator **Phone Numbers** container. The screens differ depending on whether a regional dial plan or old dial plan is active. If you skipped dial plan creation when you ran IC Setup Assistant, we recommend that you **re-run IC Setup Assistant** to create a dial plan or import an existing dial plan. You can also perform these procedures in Interaction Administrator, but they are simpler and more automated in IC Setup Assistant. See "Verify or create the dial plan" in "Post-Installation Configuration" in *PureConnect Installation and Configuration Guide* and *Interaction Administrator help*.
☐	## Enable Switchover replication for mail interactions If your implementation includes a Switchover pair, enable the replication of email interactions in the Interaction Administrator **Server Parameters** container. See "Enable Switchover replication for mail interactions" in "Post-Installation Configuration" in *PureConnect Installation and Configuration Guide*.
☐	## Complete additional mail provider configuration Complete any additional configuration required for your mail provider(s) in the Interaction Administrator **Mail** container. See "Complete additional mail provider configuration" in "Post-Installation Configuration" in *PureConnect Installation and Configuration Guide* and *Interaction Administrator help*.
☐	## Install IC User Applications on client workstations Run the IC User Applications install to install Interaction Desktop, Interaction Voicemail Player, and Interaction Fax on client workstations. This is necessary to fully test CIC functionality. See Checklist 10: "Client Workstation Installations".
☐	## Test system for basic functionality Perform the following tests for basic functionality: • Call from internal phone to another internal phone • Call from an internal phone to an external phone • Call from an external phone to an internal phone using IVR • Retrieve voicemail from email client • Test auto-attendant See "Test system for basic functionality" in "Post-Installation Configuration" in *PureConnect Installation and Configuration Guide*.

Checklist 10: Client Workstation Installations

Install the client workstation applications by running `Setup.exe` **from the appropriate workstation application share** on the CIC server. Alternatively, the administrator can use group policy deployment to install client workstation applications.

For details on each step, see "Client Workstation Installations" in the *PureConnect Installation and Configuration Guide*.

☐ Review workstation application install share directory contents

See "Workstation application install share directory contents" in "Client Workstation Installations" in the *PureConnect Installation and Configuration Guide*.

> **Note:** `Setup.exe` manually installs/updates client workstation applications and Language Pack plugins on individual client workstations.

☐ IC User Applications (32-bit and 64-bit)

The IC User Applications (32-bit and 64-bit) installation program installs Interaction Desktop, Interaction Fax, Interaction Voicemail Player, SIP Soft Phone, Interaction Screen Recorder Capture Client, Interaction SIP Bridge, and Microsoft Outlook Interaction Desktop Add-in on Windows 8.1, Windows 8, and Windows 7 user workstations.

- **Requirements** Review requirements in "IC User Applications (32-bit and 64-bit) requirements" in "Client Workstation Installations" in *PureConnect Installation and Configuration Guide*.
- **Install IC User Applications** Make sure to install the version (32-bit or 64-bit) appropriate for the workstation. Run `Setup.exe` from the **IC_UserApps_64-bit** or **IC_UserApps_32-bit** share on the CIC server. A **QoS Requirement** screen appears if SIP Soft Phone, Interaction Screen Recorder Capture Client, and/or Interaction SIP Bridge are selected. See "Install IC User Applications (32-bit and 64-bit)" in "Client Workstation Installations" in *PureConnect Installation and Configuration Guide*.
- **Install Interactive Update Client** Run `Setup.exe` from the **IC_IUpdate** share on the CIC server. Once you have installed Interactive Update Client on the workstation, the Interactive Update Client service checks for updates to IC User Applications and any other PureConnect products and components on the workstation. See "Install Interactive Update Client" in in "Client Workstation Installations" in *PureConnect Installation and Configuration Guide*.
- **Post-installation procedures** See "IC User Application post-installation procedures" in "Client Workstation Installations" in the *PureConnect Installation and Configuration Guide*.

☐ IC Business Manager Applications

The IC Business Manager Applications installation program installs IC Business Manager and Interaction Fax Cover Page Editor on supervisor workstations.

- **Requirements** Review requirements in "IC Business Manager Applications requirements" in "Client Workstation Installations" in *PureConnect Installation and Configuration Guide*.
- **Install IC Business Manager Applications** Run `Setup.exe` from the `IC_BusinessManagerApps` share on the CIC server. See "Install IC Business Manager Applications" in "Client Workstation Installations" in *the PureConnect Installation and Configuration Guide*.
- **Install Interactive Update Client** If Interactive Update Client has not yet been installed on the workstation on which IC Business Manager Applications is installed, install it now.
- **Post-installation procedures** See "IC Business Manager Application post-installation procedures" in "Client Workstation Installations" in *PureConnect Installation and Configuration Guide*.

☐ IC Server Manager Applications

The IC Server Manager Applications installation program installs IC Server Manager Applications, Interaction Administrator, Interaction Attendant, Interaction Designer, IC System Manager, Interaction Host Recorder Client, and Interaction SOAP Tracer administrator applications on administrator workstations.

- **Requirements** Review requirements in "IC Server Manager Applications requirements" in "Client Workstation Installations" in *PureConnect Installation and Configuration Guide*.
- **Install IC Server Manager Applications** - Run `Setup.exe` from the **IC_ServerManagerApps** share on the CIC server. See "Install IC Server Manager Applications" in "Client Workstation Installations" in *PureConnect Installation and Configuration Guide*.
- **Install Interactive Update Client** If Interactive Update Client has not yet been installed on the workstation on which IC Server Manager Applications is installed, install it now.
- **Post-installation procedures** See "IC Server Manager Application post-installation procedures" in "Client Workstation Installations" in *PureConnect Installation and Configuration Guide*

☐ Group Policy Deployment

CIC administrators may prefer to silently install client workstation applications using Group Policy deployment, instead of performing individual installations on hundreds of workstations. In a Group Policy deployment, users do not see any windows or enter any input during the installation. Genesys recommends group policy deployment of client workstation applications using Window startup scripts.

For more information, see the *Group Policy Deployment for CIC Applications Technical Reference*.

Checklist 11: Optional Installations and Additional Functionality

Your CIC implementation may also include one or more optional servers/services. Most require additional licenses and customization.

For details, see "Optional Installations and Additional Functionality" in *PureConnect Installation and Configuration Guide* and the appropriate reference document(s) as noted.

☐	**Review optional installations and additional files on the CIC 2015 R1 or later `.iso` file** • Off-Server Components • Integrations • Additional Files See "Optional Installations and Additional Functionality" in *PureConnect Installation and Configuration Guide*.
☐	**Trust off-host certificates following off-server installations** After installing off-server components such as Interaction Media Server and ASR servers, remember to trust off-host certifications in Interaction Administrator. See "Optional Installations and Additional Functionality" in *PureConnect Installation and Configuration Guide*.
☐	**ASR Servers** PureConnect offers trusted speech recognition solutions using vendor ASR software. Make sure you have installed the ASR servers before installing running the appropriate ASR Server installs for CIC. The Loquendo ASR, Nuance Recognizer, and/or MRCP ASR installs are available on the CIC 2015 R1 or later `.iso` file. Run `Install.exe` from the `\Installs` directory, select the **Off-Server Components** tab, and check the appropriate checkbox. See the *ASR Technical Reference*.
☐	**Interaction Recorder and Interaction Screen Recorder** **Interaction Recorder** is an application for managing phone calls, emails, faxes, screen recordings, and Web chats recorded within CIC. **Interaction Screen Recorder** is an Interaction Recorder feature that adds screen recording capability, assistant contact center managers and supervisors in improving the contact center's productivity and assessing agents' skills. The supporting files for the Interaction Recorder and Interaction Screen Recorder components are automatically installed with the CIC server, IC Business Manager Applications, and IC User Applications installs. See the *Interaction Recorder and Quality Manager Technical Reference*.
☐	**Interaction Recorder Remote Content Service** Interaction Recorder Remote Content Service facilitates the retrieval and storage of both audio and screen recordings in your Customer Interaction Center environment. The Interaction Recorder Remote Content Service install is available on the CIC 2015 R1 or later `.iso` file Run `Install.exe` from the `\Installs` directory, select the **Off-Server Components** tab, and check the appropriate checkbox. Run the install on a non-CIC server on the CIC network. See the *Interaction Recorder Remote Content Service Installation and Configuration Guide*

☐	## Interaction Recorder Extreme Query

Interaction Recorder Extreme Query is an ultra-fast solution for running searches and retrieving stored call recordings for playback.
- The Interaction Recorder Extreme Query Server install is available on the CIC 2015 R1 or later `.iso` file Run `Install.exe` from the `\Installs` directory, select the **Off-Server Components** tab, and check the appropriate checkbox. Run the install on a non-IC Server on the CIC network.
- The Interaction Recorder Extreme Query Client is automatically installed with IC Business Manager Applications install.

See the *Interaction Recorder Extreme Query Installation and Configuration Guide*. |
| ☐ | ## Interaction Administrator Web Edition

Interaction Administrator is a .NET browser-based, limited feature version of Interaction Administrator.

The Interaction Administrator Web Edition install is available on the CIC 2015 R1 or later `.iso` file Run `Install.exe` from the `\Installs` directory, select the **Off-Server Components** tab, and check the appropriate checkbox. Run the install on a Web server.

See *Interaction Administrator Web Edition Installation and Configuration Guide*. |
| ☐ | ## Interaction Center Extension Library (IceLib) SDK

The Interaction Center Extension Library (IceLib) SDK is a programming API that allows developers to create custom applications that leverage the Interaction Center to solve business problems. IceLib is for developers who use modern .Net languages, such as C# or VB.Net.

The IceLib SDK (32-bit) and (64-bit) installs are available on the CIC 2015 R1 or later `.iso` file Run `Install.exe` from the `\Installs` directory, select the **Off-Server Components** tab, and check the appropriate checkbox. The installs can be run a non-IC Server machine.

See the *Introduction to IceLib Technical Reference*. |
| ☐ | ## CIC VoiceXML Interpreter Server

CIC VoiceXML enables you to use existing applications written in the industry standard VoiceXML and take advantage of speech recognition technology without application development costs.

CIC VoiceXML requires two components:
- The VoiceXML Host Server is installed on a CIC server with Automatic Speech Recognition (ASR), as part of the CIC server installation.
- The VoiceXML Interpreter server is available on the CIC 2015 R1 or later `.iso` file Run `Install.exe` from the `\Installs` directory, select the **Off-Server Components** tab, and check the appropriate checkbox. We recommend installing it on a separate server on the CIC server network.

See the *VoiceXML Installation and Configuration Guide* in the PureConnect Documentation Library. |
| ☐ | ## Interaction Multi-Site

Interaction Multi-Site is optional CIC software that links two or more CIC contact centers to route interactions from one location to another.

Multi-Site requires two components:
- Multi-Site RTM Client is always installed and configured on a CIC server, as part of the CIC server installation.
- Multi-Site RTM Server can be installed and configured on a CIC server (along with a Multi-Site Client) as part of the CIC server installation or it can be installed on a separate server on the CIC server network. Large organizations with many remote locations should install the Multi-Site Server on a separate server. The Multi-Site RTM Server install is available on the CIC 2015 R1 or later `.iso` file Run `Install.exe` from the `\Installs` directory, select the **Off-Server Components** tab, and check the appropriate checkbox.

See *CIC Multi-Site Technical Reference*. |

☐	## Status Aggregator

Status Aggregator consolidates CIC user status information from CIC servers in multiple offices and is scalable for large numbers of users. It makes that consolidated status information available through the CIC client. Status Aggregator is intended for large organizations that have too many users to host on a single CIC server.

The Status Aggregator install is available on the CIC 2015 R1 or later `.iso` file Run `Install.exe` from the `\Installs` directory, select the **Off-Server Components** tab, and check the appropriate checkbox. Run the Status Aggregator install on a separate server on the CIC network.

See *Status Aggregator Technical Reference*. |
| ☐ | ## Interaction Analyzer

Interaction Analyzer determines, in real time, when defined words (keywords) are spoken in a telephone conversation that is associated with a workgroup queue. If a keyword is detected, Interaction Analyzer identifies the location in the recording where the word was spoken. Interaction Recorder can provide access to recorded conversations that indicate where keywords were spoken. IC Business Manager can use Interaction Analyzer and Interaction Supervisor to alert contact center supervisors in real-time and provide statistics on current calls.

The supporting files for Interaction Analyzer components are automatically installed with the CIC server and workstation application installs.

See *Interaction Analyzer Technical Reference*. |
| ☐ | ## Interaction Process Automation

Interaction Process Automation (IPA) takes the advanced communications technologies available in CIC and applies them to process automation, giving organizations a cost-effective way to automate business processes end-to-end. The supporting files for the IPA components are automatically installed with CIC server and workstation application installs.

Starting with CIC 2017 R1, the more scalable Process Automation Server Version 2 (PASv2) is the only version of the Process Automation Server that is installed on the CIC server. Starting with CIC 2016 R2, a PASv2 off-server install is available on the CIC `.iso` to install PASv2 on a non-CIC Server.

See *Interaction Process Automation Technical Reference*. |
| ☐ | ## Interaction Feedback

Interaction Feedback is an IC Business Manager add-on module that supports automated post-call customer satisfaction surveys. Interaction Feedback gives business users the ability to easily create surveys using the Create Survey Wizard. Surveys can be quickly created with pre-defined industry standard templates. Customized questions can be simply created using Interaction Feedback Tools, for creating prompts and managing questions.

The supporting files for the Interaction Feedback components are automatically installed with the CIC server and IC Business Manager installs.

See *Interaction Feedback Technical Reference*. |
| ☐ | ## Interaction Tracker

Interaction Tracker enables CIC users to view the interaction histories between CIC users and outside people, or between CIC users, by m aintaining a database of CIC users and their associated interactions.

The supporting files for the Interaction Tracker components are automatically installed with the CIC server, IC User Applications, and IC Business Manager installs.

See *Interaction Tracker Filtered Directories Technical Reference*. |

☐	## Interaction Optimizer
	Interaction Optimizer is a complete workforce management (WFM) application for CIC that optimizes agent effectiveness in contact centers of all sizes. It combines CIC's historical ACD data with projected market expectations for demand forecasts that more accurately determine required scheduling targets. Interaction Optimizer also manages agents' time-off requests and last-minute changes for schedules that balance anticipated interaction demands with agent availability and skills.
	The supporting files for the Interaction Optimizer components are automatically installed with the CIC server and IC Business Manager installs.
	For licensing, requirements, and configuration instructions, see *Interaction Optimizer Technical Reference*.
☐	## Interaction Web Tools
	Interaction Web Tools enable Customer Interaction Center (CIC) agents to interact with visitors to your company's website or use chat functionality to communicate with other CIC agents. These tools enable handlers to send and receive information from Web pages and make it possible to register and authenticate customers against the Interaction Tracker database.
	The Interaction Web Tools are available in the `IC_WebServicesChat` share on the CIC server following the CIC server installation.
	See *Interaction Web Tools Technical Reference*.
☐	## Session Manager ("Off-Server")
	Large organizations can deploy the off-server Session Manager on file servers separate from the CIC server to support N+1 scalability and disaster recovery. Off-server Session Manager implementations are recommended for CIC installations with greater than 1,000 clients. Plan to deploy at least two separate off-server Session Manager servers in case of fail-over.
	The Session Manager ("Off-Server") install is available on the CIC 2015 R1 or later `.iso` file Run `Install.exe` from the `\Installs` directory, select the **Off-Server Components** tab, and check the appropriate checkbox. Run the IC Session Manager ("Off-Server") install on a separate server on the CIC network.
	See the *Session Manager Developer Application Note*.
☐	## CIC Render Server
	The CIC Render Server is an application that allows handlers to convert `.pdf` files to Interaction Fax file (`.i3f`) format. Use this application if you want to create a set of fax back handlers based on a library of `.pdf` files.
	The CIC Render Server install is available on the CIC 2015 R1 or later `.iso` file Run `Install.exe` from the `\Installs` directory, select the **Off-Server Components** tab, and check the appropriate checkbox. Run the CIC Render Server install on any computer on the CIC server network. We recommend that you do not install it on the CIC server.
	See *CIC Render Server Technical Reference*.
☐	## SOAP Listener
	The SOAP Listener is a component of a SOAP programming API implementation in an Customer Interaction Center environment. The SOAP ISAPI ListenerTask is responsible for parsing incoming SOAP requests, dispatching requests to the appropriate method, and packaging return values into outgoing SOAP responses.
	The SOAP Listener install registers the SOAP Listener ISAPI DLL on a Microsoft IIS server. The SOAP Listener install is available on the CIC 2015 R1 or later `.iso` file Run `Install.exe` from the `\Installs` directory, select the **Off-Server Components** tab, and check the appropriate checkbox. The SOAP Listener can be installed on a computer with Microsoft IIS installed.
	See the *CIC and SOAP API Developer's Guide*.

☐	## SOAP Notifier COM Components

The SOAP Notifier COM objects are a component of a SOAP programming API implementation in an Customer Interaction Center environment. SOAP NotifierCOM objects issue SOAP notifications from automation compatible applications and add support for the Microsoft SOAP Toolkit.

The SOAP Notifier COM install registers components needed to develop or run third-party Notifier COM applications. The SOAP Notifier COM Components install is install is available on the CIC 2015 R1 or later `.iso` file Run `Install.exe` from the `\Installs` directory, select the **Off-Server Components** tab, and check the appropriate checkbox. Run it on any computer on the CIC server network.

See *SOAP Notifier COM API Developer's Guide*.

☐	## CSV lists

The CSV Lists in the `\Installs\Additional Files\CSV Lists` directory on the CIC 2015 R1 or later `.iso` file contains the template files for creating CSV lists. A reseller or system administrator can define and create one or more managed IP phones, user, or SIP station lists CSV list prior to the CIC installation, to be used by IC Setup Assistant or Interaction Administrator to import to CIC.

See "Optional Installations and Additional Functionality" in *PureConnect Installation and Configuration Guide*.

See "CSV Lists" in *CSV Lists Technical Reference*.

☐	## G-729 Hold Audio files

CIC sites can replace default on-hold music `.wav` files with G.729 compression-compatible `.wav` files in the `\Installs\Additional Files\GetHostID` directory on the CIC 2015 R1 or later `.iso` file

See "Optional Installations and Additional Functionality" in *PureConnect Installation and Configuration Guide*.

☐	## Get Host ID

You can use the GetHostID utility In the `\Installs\Additional Files\GetHostID` directory on the CIC 2015 R1 or later `.iso` file to obtain the CIC server Host ID prior to a new CIC installation.

The CIC server Host ID name is needed to generate the CIC license.

For more information, see "Optional Installations and Additional Functionality" in *PureConnect Installation and Configuration Guide*.

☐	## CIC Database files

The CIC Database Files directory in the `\Installs\Additional Files\SQL` directory on the CIC 2015 R1 or later release and patch `.iso` file contains:
- A `.zip` file containing the scripts for manually creating SQL and Oracle databases, plus a stored procedure for purging Reporting data, a sample Oracle tablespace create script, and an index rebuilding script. For more information, see "Database Server" in *PureConnect Installation and Configuration Guide* .
- The CIC Database Space Planning spreadsheet. Use the CIC Database Space Planning spreadsheet to plan how much space will be needed for the target size (initial data file size) of the CIC database for SQL Server and the CIC data and index tablespaces for Oracle. For instructions, see "Database Server" in *PureConnect Installation and Configuration Guide*.

☐	## PureConnect Documentation Library The PureConnect Documentation Library contains all CIC help systems and documentation in a single searchable unit. You can view the PureConnect Documentation Library from: - http://help.genesys.com/cic/ - The CIC server from **Start...Programs->PureConnect->Online Documentation->PureConnect Documentation Library,** after completing the CIC server installation.
☐	## IC Survey System Genesys recommends that you complete a Pre-Install survey prior to a new installation to compile all the installation and configuration information needed for the customer site. The IC Survey System is available in the `\Installs\Additional Files\IC_Survey_System` directory on the CIC 2015 R1 or later `.iso` file. Double-click `ICSurveyMenu.html` and click **New**. See "IC Survey System" in "CIC server" in *PureConnect Installation and Configuration Guide*.
☐	## IC System Handlers IC System Handlers is utility that contains the CIC handlers. You may find the IC System Handlers utility useful for migrating any handler changes prior to applying CIC 2015 R1 or later releases. The IC System Handlers install is available on the CIC 2015 R1 or later `.iso` file. Run `Install.exe` from the `\Installs` directory, select the **Off-Server Components** tab, and check the appropriate checkbox. Run the IC System Handlers install on any computer other than the CIC server. See "Optional Installations and Additional Functionality" in *PureConnect Installation and Configuration Guide*.
☐	## SNMP The SNMP service enables Network Management Systems (NMS) to monitor CIC and its subsystems for SNMP traps. A CIC subsystem also monitors itself and other CIC subsystems for SNMP requests and traps. CIC's Management Information Base (`i3ic.mib`), which contains IC-specific objects is available in the `\Installs\Additional Files\SNMP` directory on the CIC 2015 R1 or later `.iso` file See "CIC server" in *PureConnect Installation and Configuration Guide* and *CIC and SNMP Technical Reference*.
☐	## CIC Language Packs and Prompt Packs For information on supported languages in CIC and scope of localization for each language, see the *CIC Language Pack Technical Reference* at https://help.genesys.com/cic/mergedProjects/wh_tr/mergedProjects/wh_tr_language_pack/desktop/cic_language_packs.htm. The CIC Language Packs and Prompt Packs are available on the on the CIC Language Packs `.iso` file. Run `Install.exe` from the `\Installs` directory on the Language Pakcs .iso share, select the **Language Packs** tab, and check the appropriate checkbox(s). For requirements, and installation and configuration instructions, see *CIC Language Pack Technical Reference* and *CIC Prompt Pack Technical Reference* in the PureConnect Documentation Library.
☐	## IPA Integration with SharePoint Starting with CIC 2015 R3, IPA Integration with SharePoint is end-of-life and removed from CIC.

☐	**CIC Integration with LiveLOOK** Starting with CIC 2016 R1, CIC Integration with LiveLOOK is end-of-life and removed from CIC.
☐	**CIC Integration with HEAT** Starting with CIC 2016 R3, CIC Integration with HEAT is end-of-life and removed from CIC.
☐	**CIC Integration with IBM Sametime** Starting with CIC 2016 R1, CIC Integration with IBM Sametime is end-of-life and removed from CIC.
☐	**CIC Integration with Microsoft Lync** Starting with CIC 4.0 SU 2, the **CIC Integration with Microsoft Lync (Telephony and Embedded Client Plugin)** is available. This component is installed automatically when you apply the CIC 4.0 SU 2 or later updates for the CIC server and IC User Applications. Starting with CIC 4.0 SU 3, the following CIC Integration with Microsoft Lync components are available: • **Lync Presence Integration Service**. • **Lync Company Directory/Directory Merging**. This component is installed automatically when install the CIC server and IC User Applications. See "Optional Installations and Additional Functionality" in *PureConnect Installation and Configuration Guide*. For more information, see Lync (Skype) Integration page at https://help.genesys.com/cic/desktop/lync_integration_landing.htm.
☐	**CIC Integration with Remedy and Remedy IVR** Starting with CIC 2016 R2, **CIC Integration with Remedy** end-of-life and removed from CIC. Starting with CIC 2015 R3, **CIC Integration with Remedy IVR** is end-of-life and removed from CIC.
☐	**CIC Integration with Workforce Management** Starting with CIC 4.0 SU 2, CIC Integration with Workforce Management is available. The CIC Integration with Workforce Management Integration install and related files are available on the CIC 2015 R1 or later `.iso` file. Run `Install.exe` from the `\Installs` directory, select the **Integrations** tab, and check the appropriate checkbox. See "Optional Installations and Additional Functionality" in *PureConnect Installation and Configuration Guide*.
☐	**CIC Scheduled Reports** Starting with CIC 4.0 SU 2, CIC Scheduled Reports is available. The CIC Scheduled Reports installs and related files are available on the CIC 2015 R2 or later `.iso` file. Run `Install.exe` from the `\Installs` directory, select the **Off-Server Components** tab, and check the appropriate checkbox. See "Optional Installations and Additional Functionality" in *PureConnect Installation and Configuration Guide*.

☐	## Interaction SIP Bridge Starting with CIC 4.0 SU 2, Interaction SIP Bridge is available. Starting with CIC 2015 R1, Interaction SIP Bridge is installed during the IC User Applications (32-bit or 64-bit) installation on remote workstations. See "Optional Installations and Additional Functionality" in *PureConnect Installation and Configuration Guide*.
☐	## Microsoft Outlook Interaction Desktop Add-in Starting with CIC 4.0 SU 3, Microsoft Outlook Interaction Client Add-in is available. The Microsoft Outlook Interaction Client Add-in supports 32-bit Microsoft Outlook 2010 SP1 only. Starting with CIC 2016 R1, Microsoft Outlook Interaction Client Add-in was renamed Microsoft Outlook Interaction Desktop Add-in. When you install the CIC server, a Microsoft Outlook Interaction Desktop Add-in plugin install is added to the IC User Applications (32-bit and 64-bit) shares on the CIC server. To install the Microsoft Outlook Interaction Desktop Add-in on client workstations running Microsoft Outlook, from the IC User Applications (32-bit or 64-bit) share, run `Setup.exe` to install IC User Applications and select the Outlook Plugin for IC User Applications. See "Optional Installations and Additional Functionality" in *PureConnect Installation and Configuration Guide*.
☐	## Interaction Media Streaming Server Starting with CIC 4.0 SU 3, Interaction Media Streaming Server is available. The Interaction Media Streaming Server install is available on the CIC 2015 R1 or later `.iso` file. Run `Install.exe` from the `\Installs` directory, select the **Off-Server Components** tab, and check the appropriate checkbox. See "Optional Installations and Additional Functionality" in *PureConnect Installation and Configuration Guide*.
☐	## Interaction Web Portal Starting with CIC 4.0 SU 3, Interaction Web Portal is available. The Interaction Media Streaming Server install is available on the CIC 2015 R1 or later `.iso` file. Run `Install.exe` from the `\Installs` directory, select the **Off-Server Components** tab, and check the appropriate checkbox. See "Optional Installations and Additional Functionality" in *PureConnect Installation and Configuration Guide*.
☐	## Interaction Marquee Starting with CIC 4.0 SU 3, Interaction Marquee is available as a revised product in the PureConnect product line. Interaction Marquee is available inside the Interaction Web Portal framework. Interaction Marquee is automatically installed with Interaction Web Portal. See "Optional Installations and Additional Functionality" in *PureConnect Installation and Configuration Guide*.
☐	## CIC Integration with Oracle Siebel Starting with CIC 4.0 SU 3, CIC Integration with Oracle Siebel is available. The CIC Integration with Oracle Siebel install is available on the CIC 2015 R1 or later `.iso` file. Run Install.exe from the `\Installs` directory, select the Integrations tab, and check the appropriate checkbox. See "Optional Installations and Additional Functionality" in *PureConnect Installation and Configuration Guide*.

☐	**PureConnect Integration to Oracle Service Cloud** Starting with CIC 4.0 SU 3, PureConnect Integration to Oracle Service Cloud (formerly Oracle RightNow) is available. Starting with the 2015 R2 release, the PureConnect Integration to Oracle Service Cloud installs and related files are available on the Integrations 2015 R2 or later `.iso` file, available on the Product Downloads page. Run `Install.exe` from the `\Installs` directory and check the appropriate checkboxes. See "Optional Installations and Additional Functionality" in *PureConnect Installation and Configuration Guide*.
☐	**Interaction Center Web Services (ICWS) SDK** Starting with CIC 4.0 SU 6, Interaction Center Web Services (ICWS) SDK is available. The ICWS SDK is a REST API for web, mobile, and desktop clients. The ICWS SDK includes: • ICWS API documentation • Example applications • Language-specific libraries The ICWS install for Windows and `.zip` file for platforms other than Windows are available on the CIC 2015 R1 or later `.iso` file. See *IC Web Services SDK Installation and Configuration Guide*.
☐	**IPA Stand-Alone Web Client** Starting with CIC 2015 R2, the IPA Stand-Alone Web Client is available. The IPA Stand-Alone Web Client consists of the IPA Work Item Client and the IPA Work Item Viewer. The IPA Stand-Alone Web Client files are in the CIC Web Applications download `.zip` file on the Product Downloads page. See "Optional Installations and Additional Functionality" in *PureConnect Installation and Configuration Guide*.
☐	**Interaction Connect** Starting with CIC 2015 R2, Interaction Connect is available. Interaction Connect is a browser-based interaction management client application offering call control functionality, chat features, and status management. The Interaction Connect files are in the CIC Web Applications download `.zip` file on the Product Downloads page. See "Optional Installations and Additional Functionality" in *PureConnect Installation and Configuration Guide*.
☐	**CIC Appliance `.iso` (Interaction Edge)** Starting with CIC 2015 R2, a CIC Appliance `.iso` containing the following CIC Appliance-related update components was created for customers who need to updated these components on appliances in a CIC 3.0 environment: • Interaction Media Server • Interaction SIP Proxy • Interaction Media Server EDGE • Interaction SIP Proxy EDGE The CIC Appliance 2015 R2 or later `.iso` is available to download from the Product Downloads page. See "Optional Installations and Additional Functionality" in *PureConnect Installation and Configuration Guide*.

☐	**ININProductInfo utility** Starting with CIC 2015 R3, the ININProductInfo utility is available. The ININProductInfo utility gathers information about installed PureConnect products and system information, logs, and (optionally) applied operating Knowledge Base updates and Windows Installer logs, to help PureConnect Customer Care and Testing teams diagnose installation issues. Following the 2015 R3 CIC server installation, the ININProductInfo utility is available in the `\Utilities` share on the CIC server.
☐	**Crystal Report Import Utility** The Crystal Report Import Utility is available to download from the Utilities and Downloads page. It is a an easy-to-use wizard for importing a new crystal report into the system using an `.rpt` file and user-friendly forms, run from IC Business Manager. See "Optional Installations and Additional Functionality" in *PureConnect Installation and Configuration Guide*.
☐	**Database Schema Change Library** To help with upgrading database customizations, see Database Schema Change Library in the *PureConnect Installation and Configuration Guide*.
☐	**PureCloud for CIC Integration** Starting with CIC 2016 R3, the PureCloud for CIC Integration is available. The PureCloud for CIC Integration enriches the CIC user experience by leveraging the power and data of CIC and the collaborative features of PureCloud.

See "Optional Installations and Additional Functionality" in *PureConnect Installation and Configuration Guide*.

Change Log

The following changes have been made to this document since the CIC 4.0 GA release.

Date	Change
22-March-2012	In Checklist 10: Client Workstation Installations, added information about localized client workstations applications, Client Language Plugin installs, and new Setup.exe in IC 4.0 SU 1.
22-March-2012	In Checklist 11: Optional Installations and Additional Functionality, added a new item for IC Language Packs and Prompt Packs.
21-August-2013	Made updates through the document to bring it up to date with the IC Installation and Configuration Guide for IC 4.0 SU 4.
03-October-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 Interactive Intelligence Product Information site URLs, and copyright and trademark information.
15-January-2015	Updated Copyright page for 2015.
15-January-2015	Updated Checklist 7: IC Server Installation for changed order of installation due to Install.exe prompt for license file in CIC 2015 R2 or later.
15-January-2015	Updated Checklist 11: Optional Installations and Additional Functionality for the following changes: -"IC Integration with Oracle RightNow" to "IC Integration with Oracle Service Cloud." -New sections IPA Web Client, Interaction Connect, and CIC Appliance .iso, for the CIC 2015 R2 release.
02-April-2015	Updated document to reflect changes required in the transition from Interaction Client .NET Edition to Interaction Desktop in CIC 2015 R3 and later.
02-April-2015	Updated Checklist 11: Optional Installations and Additional Functionality for the following changes: - "IPA Integration with SharePoint" for end-of-life starting with CIC 2015 R3. - "IC Integration with Remedy and Remedy IVR" for Remedy IVR end-of-life starting with CIC 2015 R3. -New section "ININProductInfo utility," for the CIC 2015 R3 release.
02-April-2015	Updated Copyright page.
15-June-2015	Updated Cover page for CIC rebranding.
01-July-2015	Updated Checklist 3: Client Workstation Requirements in "Fulfill client workstation software requirements" to include support for 32-bit as well as 64-bit for Windows 8 and Windows 8.1.
24-July-2015	Updated references to "Lotus Domino/Notes" to "IBM Domino/Notes" in this document. Updated Checklist 5: Mail System Requirements for support for IBM Domino/Notes 9, available in CIC 2015 R4 and later.
04-October-2015	Updated the document for rebranding in CIC 2016 R1 and later.
04-October-2015	Updated the document for removal of Interaction Client .NET Edition and renaming of Microsoft Outlook Interaction Client Plugin to Microsoft Outlook Interaction Desktop Plugin in CIC 2016 R1 and later.

04-October-2015	Updated Checklist 11: Optional Installations and Additional Functionality for the following changes: -Add new section "Trust off-host certificates following off-server installations." -"IC Integration with LiveLOOK for end-of-life starting with CIC 2016 R1. -"IC Integration with IBM Sametime" for end-of-life starting with CIC 2016 R1. -"IC Database files" for zip file containing SQL and Oracle DB scripts for each release and patch on the CIC .iso, starting with CIC 2016 R1. The zip file is also posted on the Downloads page on the Product Information site.
06-October-2015	Updated document to refer specific .NET Framework requirements to the IC Installation and Configuration Guide.
06-January-2016	Updated Checklist 5: Mail System Requirements for Exchange Web Services requirements. Starting with CIC 2016 R2, the minimum supported Exchange version for Exchange Web Services is Exchange 2010 SP2.
06-January-2016	Updated Checklist 11: Optional Installations and Additional Functionality for the following changes: - "IC Integration with Remedy" for end-of-life starting with CIC 2016 R2. - "Interaction Process Automation" for PASv2 off-server install available in CIC 2016 R2 or later. - Added new sections "Crystal Report Import Utility" and "Database Schema Change Library."
07-April-2016	Updated Checklist 5: Mail System Requirements for Exchange Web Services requirements for Exchange 2016 support in CIC 2016 R1 and later.
07-April-2016	Updated Checklist 11: Optional Installations and Additional Functionality for the following changes: - "PureCloud for CIC Integration Phase 1" available in CIC 2016 R3 and later. - "IC Integration with HEAT" for end-of-life starting with CIC 2016 R3.
13-September-2016	Updated Checklist 11: Optional Installations and Additional Functionality in "Interaction Process Automation" for PASv2 is only version of Process Automation Server installed on ICC server starting with CIC 2017 R1.
07-December-2016	Updated Checklist 6; Database Server Requirements to include SQL Server 2016.
28-April-2017	Starting with CIC 2017 R4, Salesforce Web integration, Interaction Client Web Edition, and Interaction Mobile Web Client were removed from existing CIC installations and are no longer installed with new CIC installations.
08-Aguust-2017	Updated Checklist 8: IC Setup Assistant to replace "Server Group Certificate and Private Key" and "Server Group Certificate and Private Key Locations" with "Certificate Signing Option".
26-September-2017	Rebranding
28-November-2017	Updated requirements to include Windows Server 2016.
23-January-2018	Updated requirements to remove Windows Server 2008.
19-April-2018	Conversion to HTML.
25-July-2018	Remove specific references to software versions.
15-October-2018	Updated tech ref links from landing pages to PDF. Updated Licensing Management site link to Activation File Management Tool.

19-December-2018	Updated for the addition of Genesys phones.
10-February-2019	Updated for separate Language Packs .iso files.
22-May-2019	Removed section for "New CIC distribution model".
21-January-2020	Updated links to Installation and Configuration Guide to display .htm in a new page. Updated links to all TRs to display .htm in a new page.
19-February-2020	Replaced links to my.inin.com localization page with link to Language Pack TR.
2-March-2020	Updated requirements to include Windows Server 2019.
30-April-2020	Updated links from my.inin.com to new locations.
10-July-2020	Updated link to Database Schema Change Library.