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See Change Log for summary of changes.

Interaction Director Monitored Server

Installation and Configuration Guide

Abstract

This document describes how to configure Monitored Servers to work with Interaction Director.

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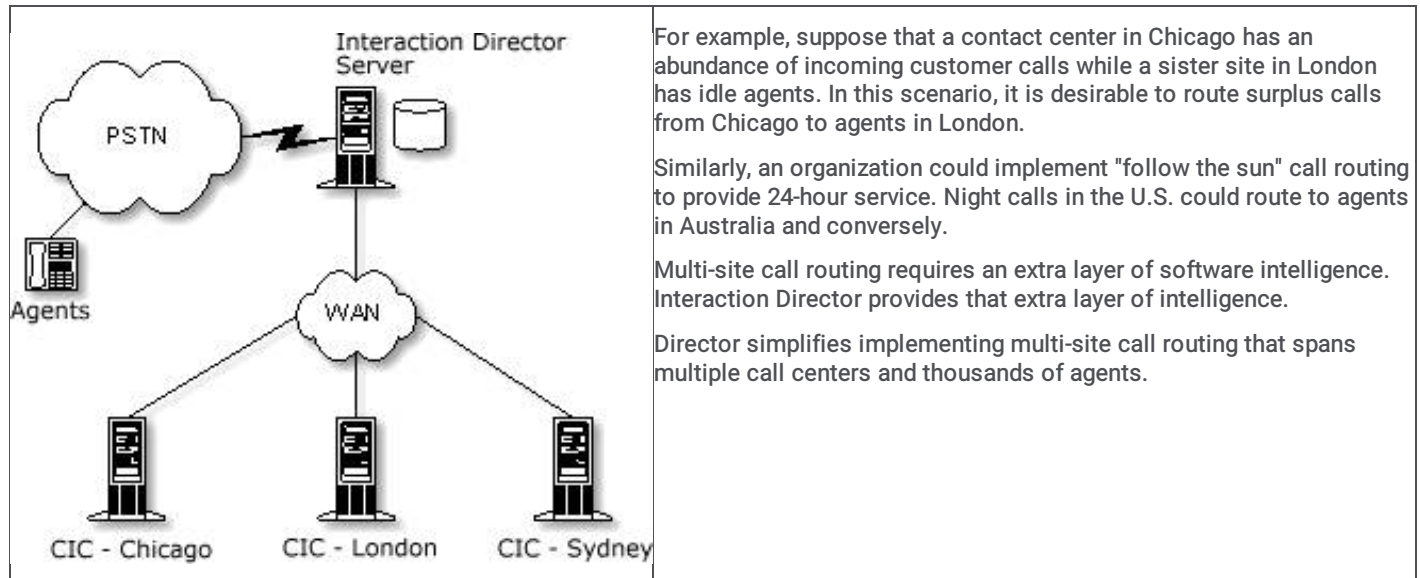
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Introduction to Director Monitored Servers

Interaction Director is a call routing solution for multi-site contact centers that provides scalable, reliable, and configurable pre- and post-call routing. Architecturally, it has two classes of components:

- **Director Server:** A stand-alone machine on which the Director Server software runs. The Director Server monitors the availability of agent resources on one or more CIC servers.
- **Monitored Server(s):** One or more CIC servers on which you activated the Director Monitored Server feature of CIC. These CIC servers are called *Monitored Servers.* Each of these servers provides information to the Director Server that allows it to route calls most efficiently.

Multi-Site Call Distribution with Interaction Director

It is common for organizations to have multiple contact centers around the world. Each site is a separate, autonomous entity that processes calls, regardless of what is happening at another contact center. But, what if distributed agents are part of a single, *global* contact center?

For example, suppose that a contact center in Chicago has an abundance of incoming customer calls while a sister site in London has idle agents. In this scenario, it is desirable to route surplus calls from Chicago to agents in London.

Similarly, an organization could implement "follow the sun" call routing to provide 24-hour service. Night calls in the U.S. could route to agents in Australia and conversely.

Multi-site call routing requires an extra layer of software intelligence. Interaction Director provides that extra layer of intelligence.

Director simplifies implementing multi-site call routing that spans multiple call centers and thousands of agents.

To implement a global contact center, you need a CIC server at each contact center and a stand-alone Interaction Director server at one of the sites. The Director server must have TCP/IP connectivity with CIC servers and it must know their IP addresses. The combination of CIC servers with a stand-alone Interaction Director server unites them into a global contact center.

Director Server runs on separate hardware from CIC servers. However, it uses existing PureConnect platform architecture to facilitate configuration and customization options. A single Director server supports up to 30 CIC sites and can process many thousands of calls per hour. Director can pool the entire collection of agents to manage customer calls and email messages efficiently. Individual contact center sites continue to function autonomously when the network or central Director server becomes unavailable.

Install and Update a CIC Server as a Monitored Server

Starting with CIC 4.0 Service Update (SU) 3, all subsequent CIC releases include the supporting files required to allow an Interaction Director server to monitor a CIC server. When you apply the latest CIC release to a CIC server, the Director-monitored Server components install automatically. To activate the Director-monitoring feature, rerun Setup Assistant on the monitored server.
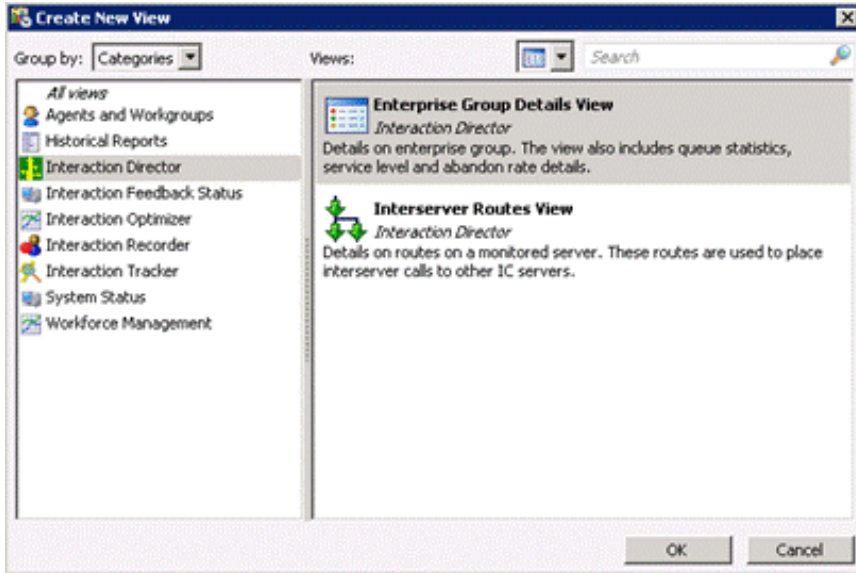
Note:

Rerunning Setup Assistant to add new options requires a restart of the CIC subsystems and possibly a restart of the CIC Server itself, so plan this update when it won't disrupt important business operations.

Views Added to Interaction Supervisor

Interaction Director includes views that are available in Interaction Supervisor. These views include Enterprise Group Details and Interserver Routes statistics.

Interaction Supervisor presents data values dynamically in real time. Displayed information is always up-to-date, since statistics update in response to notification events. You can create custom alerts to notify of important events. You can set alerts on any statistic displayed in a view.

For more information about Interaction Director views and statistics, see the Interaction Supervisor Help.

Configure a CIC Server as a Monitored Server

Interaction Director can monitor any CIC 4.0 or 20## R# servers once you activate the Director Monitored Server feature and create a CIC user account for Interaction Director to use. To do these steps, rerun Setup Assistant on each CIC server that you want to use with Interaction Director. The *Interaction Director Monitored Server Installation and Configuration Guide* covers CIC 4.0 or later servers only.
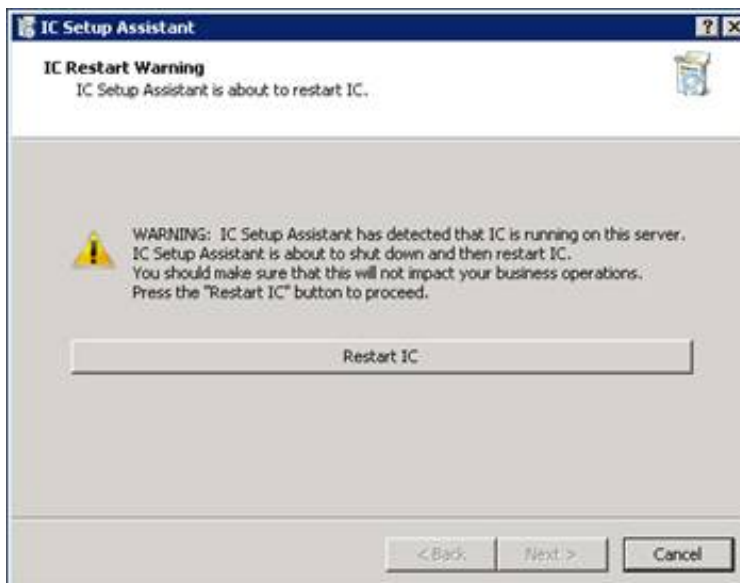
Note:

Rerunning Setup Assistant to add options requires a restart of the CIC subsystems and possibly a restart of the CIC Server itself. So, be plan this update when it won't disrupt important business operations.

To activate Director Monitored Server features on a CIC server

1. On the CIC Server, click **Start** > **Programs** > **Interactive Intelligence** > **Setup Assistant**. The **IC Setup Assistant** wizard appears.

2. Click **Options** and then click **Proceed**.

3. Click **Restart IC** to restart CIC and wait until the **Select IC Optional Components** page appears.
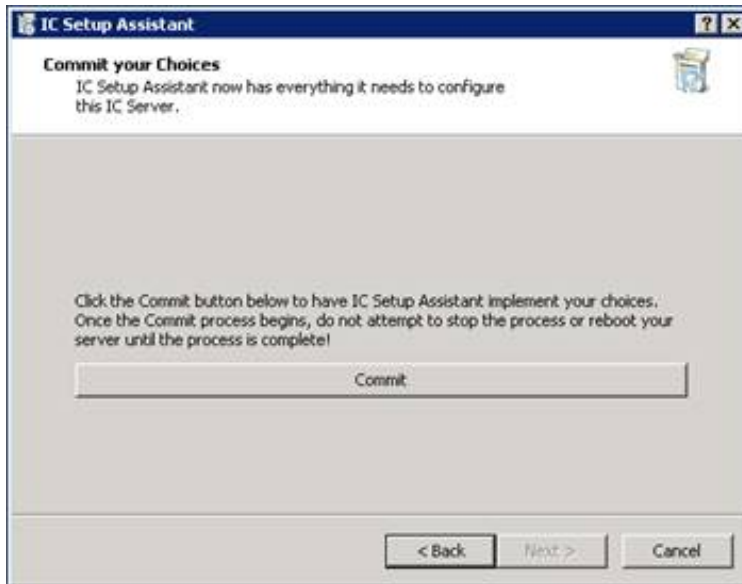
4. Select the **Director Monitored Server** check box and then click **Next**.
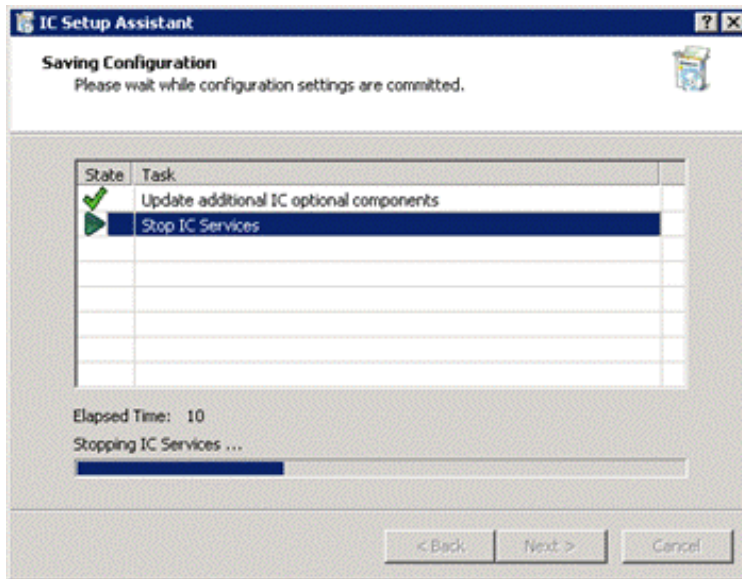

Interaction Director uses a CIC user account to monitor CIC servers.

5. Do one of the following:
   - To use an existing CIC user account, click **I have already set up a Use**.
   - To create a CIC user account, click **Create a new User with these credentials**.

6. Specify the user name and password. If you are creating a CIC user account, retype the password in the **Confirm password** box. Retain this CIC user name and password for later configuration on the Interaction Director server.

7. Click **Next**.

8. Click **Commit**. IC Setup Assistant applies the changes and restarts the related services, as shown.

9. Click **Finish**. IC Setup Assistant restarts the CIC Server and completes the configuration for this Director Monitored server.

Connect to an Interaction Director Server

The final configuration to activate the data flow between a Director server and a monitored server occurs in the Interaction Administrator interface on the Interaction Director server. For more information, see the Interaction Director Installation and Configuration Guide and the online help on a Director server for information about activating monitored CIC servers.

Change Log

The following table lists the changes to the *Interaction Director Monitored Server Installation and Configuration Guide* since its initial release.

Date	Change
26-January-2013	Initial release of the 4.0 version of this document.
22-November-2016	Updated for incorporation in CIC 2017 R2
02-October-2017	Rebranded to Genesys.
21-March-2018	Updated document format.
04-June-2019	Reorganized the content only, which included combining some topics and deleting others that just had an introductory sentence such as, "In this section...".
15-January-2020	Removed reference to CIC 3.0 in Configure a CIC Server as a Monitored Server because it reached End of Support on July 1, 2018.
29-April-2020	Update or remove links to "my.inin.com" as appropriate.