

Oracle® IVR Integrator

Installation Guide

Release 11i for Windows NT

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1 Installation Overview

The installation of Oracle IVR Integrator requires that you follow a sequence of tasks that result in a properly installed and configured product ready for first time use.

First, you select Oracle Call Center Services from the installation CD-ROM. This selection installs Oracle IVR Integrator on the server.

Next, you install Oracle Integrated Manager on the administrator's and supervisor's workstations. Integrated Manager is the user interface that allows you to administer and monitor Oracle IVR Integrator.

To properly install Oracle IVR Integrator, you must perform the following high-level steps:

1. Install Microsoft Internet Explorer 4.01 with Active Desktop (installed before any IE upgrade) and reboot.

You may upgrade to a higher version of Internet Explorer AFTER installing version 4.01 with Active Desktop. For more information on installing Microsoft Internet Explorer, please refer to your Microsoft Internet Explorer documentation.

2. Install Oracle 8i Client with ODBC.

This requires version 8.0.6.2 or later. For more information on installing Oracle 8i Client with ODBC, please refer to the *Oracle 8i Installation Guide for Windows NT*.

3. Install PC-DCE.

For more information on installing PC-DCE, please refer to the Entegrity Solutions (Gradient) documentation.

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Please note that the DCE Cell must be installed on the Call Center Connectors server. If the DCE cell is installed on a different machine than IVR Integrator, then you must install DCE Client 4.0 on the same machine as IVR Integrator.

4. Configure PC-DCE version 4.0.
5. Configure ODBC driver.
6. Install CT-Connect client.

This is only required with IVR Monitor service. For more information on installing Dialogic CT-Connect 5.0, please refer to the Dialogic documentation.

7. Install IVR Integrator Server.
8. Run DCE scripts (against the cell only) and reboot.
9. Install Integrated Manager.

Integrated Manager is the user interface that allows you to administer and monitor IVR Integrator. For more information on installing Integrated Manager, please refer to *Installing Oracle Campaign Plus*.

Once installation is complete, refer to the *Oracle IVR Integrator Implementation Guide*.

2 Hardware Requirements

The following hardware requirements apply to Oracle IVR Integrator.

2.1 Server

Install Oracle IVR Integrator on a network-connected, server-class machine. The server hardware requirements for Oracle IVR Integrator are as follows:

Hardware	Requirement
Computer	Pentium II 450 MHz or better
Operating System	Microsoft Windows NT 4.0 (Service Pack 5)
Hard Drive	5 GB free space
Other Drives	CD-ROM drive to install Oracle IVR Integrator, or the ability to access a CD-ROM drive over the network
Monitor	256 color display

Hardware	Requirement
RAM	128 MB Note: If you install more than one Oracle CRM application extension to a single server, the installation may require more RAM. For more information, contact your Oracle consultant.
Miscellaneous	Mouse or other pointing device

The installation and maintenance of Oracle CRM application extensions requires setting up Windows NT user accounts that have administrator-level user rights to each server that runs an Oracle CRM application extension, or a third party product for the Oracle CRM application, which Oracle is responsible for installing or configuring. The customer is responsible for creating user accounts for the administration of Oracle CRM servers.

User accounts that belong to the built-in Administrator group and that have the correct CRM user accounts are usually local to an Oracle CRM application server. In this case, you need to create a user account for each Oracle CRM server. When you perform maintenance on Oracle CRM servers, always use the Oracle CRM user account that has been set aside for that purpose.

2.2 Interactive Voice Response (IVR) Systems

Oracle IVR Integrator supports any IVR system that is capable of sending ASCII call transaction data through a TCP/IP socket connection and that supports a CTI interface layer. For non-CTI capable IVRs Oracle IVR Integrator provides support through CT-Connect for Lucent & Nortel switches with most IVR systems. Oracle IVR Integrator supports the majority of industry standard IVRs available today.

3 Software Requirements

The following software requirements apply to databases and ODBC.

3.1 Databases

The Oracle CRM system database must be installed and configured prior to installation of Oracle IVR Integrator. You will be required to enter database information during the installation and configuration of Oracle IVR Integrator.

Oracle IVR Integrator supports the following databases:

Database	Remote Communications with the Database Server
Oracle <i>8i</i>	Oracle 8.1.6

3.2 Open Database Connectivity (ODBC)

ODBC drivers are required on each workstation running certain Oracle CRM applications (including Oracle IVR Integrator Administrator).

Oracle supports the following ODBC driver:

Database	ODBC Driver
Oracle <i>8i</i>	Oracle 8.00.05

3.3 Computer-Telephony Integration (CTI) Middleware

Oracle IVR Integrator supports the latest version of CT Connect CTI middleware. A PBX/ACD switch must be configured with its own proprietary CTI interface, typically via a TCP/IP interface, which is then converted to a higher-level CTI protocol/API via a third-party CTI vendor, that is, Dialogic CT Connect.

3.4 Oracle Integrated Manager

Oracle Integrated Manager is the required software tool for configuring and managing Oracle Call Center telephony application extensions, including Oracle IVR Integrator and Oracle IVR Monitor.

4 Installation Procedures

The installation of Oracle IVR Integrator requires that you follow a sequence of tasks that result in a properly installed and configured product ready for first time use.

The Oracle IVR Integrator installation and configuration procedures are described in the following sections:

- Installing Microsoft Internet Explorer 4.01 with Active Desktop
- Installing Oracle 8.06 Client
- Installing Gradient PC-DCE
- Configuring the PC-DCE Cell
- Configuring the PC-DCE Client
- Installing Dialogic CT Connect Client

- Installing Oracle Call Center Services
- Running Oracle Scripts Against the PC-DCE Cell
- Installing Oracle Integrated Manager

4.1 Installing Microsoft Internet Explorer 4.01 with Active Desktop

Microsoft Internet Explorer with Active Desktop must be installed on the same machine as Oracle Integrated Manager so that Windows has Web integration. The installation of Active Desktop adds Web-enhanced features to the Windows Desktop, Taskbar, Start menu, and folders.

If a version of Internet Explorer with Active Desktop is already installed, proceed to Installing Oracle 8.06 Client. If Active Desktop is not installed, you need to install Microsoft Internet Explorer 4.01 before installing Oracle IVR Integrator or any higher version of Internet Explorer.

If a version of Internet Explorer higher than 4.01 without Active Desktop is already installed, you need to reinstall Windows NT 4.0, Service Pack 5, and then install Microsoft Internet Explorer version 4.01 with Active Desktop. If you want to upgrade Internet Explorer, install the upgrade only after you have installed Internet Explorer version 4.01 with Active Desktop.

Guidelines

- When installing Microsoft Internet Explorer 4.01 with Active Desktop, choose **Standard Installation**.
- At the Windows Desktop Update prompt to install the Active Desktop option, "Would you like to install it?", choose **Yes** and proceed with the rest of the installation according to the onscreen instructions.
- After Active Desktop is installed, it does not have to be turned on. See the Microsoft Internet Explorer instructions for directions.

4.2 Installing Oracle 8.06 Client

During the installation, observe the following guidelines.

Prerequisites

None

Guidelines

- From the CD-ROM, install Oracle 8.06 client to the default drive C:\ and follow the onscreen instructions.

- In the Select Installation Options box, choose Oracle8 Client.
- In the Select Oracle8 Client Configuration box, choose Database Administrator.
- Reboot the system when the installation of Oracle 8.06 client is complete.

4.3 Installing Gradient PC-DCE

Oracle IVR Integrator requires Gradient PC-DCE. Oracle IVR Integrator communicates with Oracle CRM vertical applications over a local area network (LAN) and with your IVR system via TCP/IP. To facilitate communication between machines, Oracle software operates within a Distributed Computing Environment (DCE).

The DCE consists of a group of machines called hosts that are joined together in a DCE unit called a cell. The cell defines the collection of services, applications and hosts that are available to the cell's members. Cells are similar to domains in the Microsoft network architecture.

Within the DCE, the DCE cell keeps track of DCE clients. When a DCE client boots, it reports itself to the DCE cell. Within the client/server architecture, when a client needs the services of a server, the DCE client informs the DCE cell and the cell connects the client to the server.

The DCE cell must be located on a server. It may reside on the same machine as another Oracle service that has sufficient resources. Oracle DCE configuration scripts install the DCE directories that are required by the Oracle services. These scripts only need to be run against the cell, and not the clients.

The PC-DCE components include a cell directory server and a client.

During the installation, observe the following guidelines.

Prerequisites

None

Guidelines

- From the Gradient PC-DCE CD-ROM, install PC-DCE to the default drive C:\ and follow the onscreen instructions.
- Either the cell or the client must be installed on the IVR server and the Oracle Call Center Connectors server.

- Only one PC-DCE cell is required, and you may install it on either machine, but you must install and configure the PC-DCE cell before the client.
- You may install the PC-DCE client on any machine that does not have PC-DCE. You do not need to install the PC-DCE client on any machine that has a PC-DCE cell.
- In the Select Components screen, the required components are:
 - Client Runtime Kit
 - Cell Directory Server
 - Security Server
- Reboot the system after the installation of PC-DCE is complete.

4.4 Configuring the PC-DCE Cell

Configure the PC-DCE cell according to the following procedure.

Prerequisites

You must have already installed Gradient PC-DCE. See “Installation Procedures.”

Steps

1. Choose the DCE Cell tab.
2. In the **Cell Name** field, enter an arbitrary name for the cell.
3. In the Principal field, accept the default `cell_admin`.
4. Enter a password. Make a note of this password. You will need it when you configure Oracle Integrated Manager.
5. Verify that the Distributed Time Service box is not checked.
6. Choose **OK**.
The Configuration Successful message opens.
7. Choose **OK**.
The PC-DCE Service Panel opens. The Status column should list the following services as Running:
 - DCE Daemon
 - DCE Security Service
 - DCE CDS Advertiser

- DCE Cell Directory Service

Oracle DCE configuration scripts install the DCE directors required by the services. The configuration scripts are located in X:\ <destination folder>\DCEConfiguration\scripts\DCE_2.0, where X:\ is the install drive.

4.5 Configuring the PC-DCE Client

Configure the Gradient PC-DCE client immediately after completing the PC-DCE client installation.

Prerequisites

- You must have already installed Gradient PC-DCE and configured the PC-DCE cell. See “Installation Procedures.”
- The PC-DCE cell must be running.

Steps

1. Open the Control Panel and click the PC-DCE icon.
2. In the PC-DCE window, click **Configure**.
3. Choose the Options tab and ensure that the only check box selected is the **Start Daemons During System Boot** check box.
4. Choose the DCE client tab. In the **CDS Server Host Name** field, enter the machine name where the DCE cell is located.
5. Check the **Configure Client Daemon** check box.
6. In the **Administer Password** field, enter the password for the Cell Principal Name.
7. Click **OK**.

After the configuration process starts, it runs automatically and completes in two or three minutes. When the configuration ends, a message opens stating that the configuration was successful.

After configuration successfully ends, the status of entries that appear in the configure window must be “Running.” No other status is acceptable.

4.6 Installing Dialogic CT Connect Client

Dialogic CT Connect is only required with the IVR Monitor service. During the installation of Dialogic CT Connect, observe the following guidelines.

Prerequisites

None

Guidelines

- From the Dialogic CT Connect CD-ROM, install CT Connect to the default drive C:\ and follow the onscreen instructions.
- Install the CT Connect client on the IVR Integrator machine.
- In the CT Connect Components screen, the required component is the most recently supported version of CT Connect client, currently version 4.0.

4.7 Installing Oracle Call Center Services

From the Oracle CD-ROM, install Oracle Call Center Services to the default drive C:\ according to the following procedures. If the setup program does not start automatically, go to the root directory on the installation CD and run setup.exe. You have the option of installing Oracle Call Center Services (that is, Oracle Call Center vertical application extensions), and Oracle Integrated Manager. When manually starting the setup program, be sure to select the main setup.exe so that all of the installation product options are presented.

Prerequisites

None

Steps

1. Place the installation CD-ROM in the CD-ROM drive of the PC.
The main setup program window opens.
2. Click **Oracle Call Center Services**.
The setup program is initialized and the Welcome dialog box opens.
3. Click **Next**. The Software License Agreement dialog box opens.
4. Click **Yes** to accept the terms of the license agreement and then click **Next**.
The User Information dialog box opens.
5. Type a name and company and then click **Next**.

The Choose Destination Location dialog box opens. The Destination Folder area displays the default destination folder for the files. If this location does not exist, the setup program will create it for you.

6. Click **Next** to accept the default destination folder.

OR

Click **Browse** to choose another destination folder or create a new destination folder. When you return to the Choose Destination Location dialog box click **Next**.

The Setup Type dialog box opens.

7. Select **Custom** and then click **Next**.

The Select Components dialog box opens.

8. From the Select Components dialog box, first clear all check boxes and then select only the following:
 - Oracle IVR Integrator Server
 - Oracle Directory Maintenance
 - Oracle Service Monitor

9. Click **Next**.

The Select Program Folder dialog box opens.

If you previously installed Oracle Campaign Plus or Oracle Predictive, the dialog box lists the previously installed components and asks if you want to overwrite them. If you want to use the same components in the same directory locations as the previous installation, leave the check boxes unchecked and click **Next**.

10. The Select Program Folder box opens, displaying the default program folder. If the program folder does not exist, the setup program creates it for you.

You have the following options:

- Click **Next** to accept the default program folder.

OR

- Choose another program folder in the Existing Folders box and then click **Next**.

OR

- Type a new program folder in the Program Folders box and then click **Next**.

The Directory Share User Name dialog box opens.

11. In the Account box, type the login for the Windows NT administrator-level user or group account that will be used to administer Oracle IVR Integrator. Oracle strongly recommends that you use a group account rather than a user account.
12. Click **Next**.
A summary of the setup parameters appears.
13. Click **Next**.
The setup program prompts you to create ODBC system data sources.
14. Click **OK**.
The ODBC Data Source Administrator opens.
15. If you have already created ODBC system data, click **Close** and go to step 16.
If you have not already done so, in the ODBC Data Source Administrator dialog box, click **OK** to save your data sources and close the ODBC Data Source Administrator dialog box and return to the setup program.
16. Choose **Yes, I want to restart my computer now**, and then click **Finish**.

4.8 Running Oracle Scripts Against the PC-DCE Cell

Use the following procedure to run Oracle scripts against the Gradient PC-DCE cell.

Note: The cell scripts need to run only once against the cell for all services. If you also install CP PPlus and Predictive, you do not need to run the scripts again.

Prerequisites

You must have installed Gradient PC-DCE, and configured the PC-DCE cell and the PC-DCE client.

Steps

1. **Start > Run > type cmd.**
2. **Start > Programs > Oracle > DCE Configuration > Scripts > DCE_2.0.**
3. Type **Run ConfigureDCECELL <password>**.

4.9 Installing Oracle Integrated Manager

Oracle Integrated Manager is the application that you use to create and configure Oracle IVR Integrator services. You may install Oracle Integrated Manager on either the Windows NT server that runs services, or on a separate call center administrator work station.

From the Oracle CD-ROM, install Oracle Integrated Manager according to the following procedure.

Prerequisites

None

Steps

1. Insert the Oracle Call Center Applications CD-ROM in the CD-ROM drive.
The setup starts automatically.
2. In the Oracle Call Center Applications 11i screen, choose **Oracle Integrated Manager**.
3. In the Select Install Options screen, accept the default **Both**, then choose **Next**.
4. In the Setup Type screen, choose **Custom**, then click **Next**.
5. In the Select Components screen, remove the check marks from each of the listed components and then re-check each component. Re-checking the components makes sure that all the sub-components are selected. Then click **Next**.
6. When the installation feedback messages appear, click **Next** or **OK** at each message.
7. When the Setup Complete message appears, choose **Finish**.
8. Reboot.
You have completed all installation procedures for Oracle IVR Integrator.

5 Installation Worksheets

Installation worksheets are designed to help you gather the information required to install Oracle IVR Integrator. To successfully install Oracle IVR Integrator, enter the information requested on the following worksheets during the installation process. For more information on Oracle IVR Integrator installation, see "Installation Procedures."

The following worksheets are available for this installation.

- Oracle IVR Integrator Installation Worksheet
- Oracle Integrated Manager Installation Worksheet

5.1 Oracle IVR Integrator Installation Worksheet

Please complete the following:

- Select the Oracle IVR Integrator components to be installed.
 - Identify the name of the DCE cell principal and the password for the DCE cell principal.
 - DCE cell principal name: _____
 - DCE cell principal password: _____
 - Identify the destination directory for the Oracle IVR Integrator files. Choose one.
 - Accept the default.
 - Choose a different destination directory: _____
 - Identify which database driver being used to access the Oracle CRM system database.
 - ____ Oracle
 - Specify the database parameters for the system database.
 - Oracle
 - System database name in TNSNAMES.ORA: _____
 - ODBC Server
 - System data source name: _____
 - System database name: _____
 - Identify the Windows NT administrator-level user account set up on the server that will be used to administer Oracle IVR Integrator.
-

5.2 Oracle Integrated Manager Installation Worksheet

Please complete the following:

- Identify the destination directory for the Oracle Integrated Manager files. Choose one.
 - Accept the default.

- Choose a different destination directory: _____
- Select an install option for Oracle Integrated Manager. Choose one.
 - _____ **Both:** Installs both Oracle Integrated Manager components and Oracle Integrated Manger service controls.
 - _____ **Integrated Manager Components:** Installs only Oracle Integrated Manager components.
 - _____ **Service Controls:** Installs only Oracle Integrated Manager service controls.
- Select a setup type for Oracle Integrated Manager. Choose one.
 - _____ **Administrator.** Installs the necessary files to allow administrative operations within Integrated Manager.
 - _____ **Custom.** Allows you to choose specific snap-ins, sample consoles, and utilities to run with Integrated Manager.
 - _____ **Minimal.** Installs the minimum required files to run Integrated Manager.
 - _____ **Supervisor.** Installs the necessary files to allow supervisory operations within Integrated Manager.
- Identify the program folder for Oracle Integrated Manager. Choose one:
 - Accept the default.
 - Choose a different program folder: _____

6 Documentation Accessibility

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