



# Edify Voice Interactive Platform (EVIP) 13.0 Voice Response Unit Initial Preparation and Configuration

November 24, 2015

## Before You Begin

This document contains important steps that must be followed correctly. While the technically savvy user may be able to easily complete a general installation, setting up a VRU can be tedious and time-consuming. More importantly, if a step or process is skipped or performed incorrectly, the procedure to recover may be overwhelming. **Therefore, it is imperative that you read and fully understand this document before beginning.**

If you are unfamiliar with the end-user specific Relius implementation and environment, please contact Relius Technology at (800) 326-7235, Option 3, before proceeding. Relius Technology can arrange a brief conference call to provide important details regarding each user's unique operational environment and details regarding the Relius installation and upgrade process. This will help ensure your deployment efforts are successful and efficient. We can also schedule priority telephone support during or after business hours to maximize the time you spend on any Relius project. It is important to note that failure to fully meet the prescribed hardware requirements, deployment methods, or closely follow the installation documents and upgrade steps could result in installation problems, unnecessary downtime, and possible end-user data loss.

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## Overview

This document covers only the preparation of the Relius Administration Voice Response Unit (VRU) powered by the Edify Voice Interactive Platform (EVIP). To install Relius Administration, please refer to the appropriate Relius Administration Installation and Configuration document. All references to the Relius Administration VRU will be hereinafter called VRU.

The installation of the VRU involves the following basic procedures:

- 1) Read and understand the entire document before beginning.
- 2) Ensure Relius Administration 19.1 or later is installed and fully functional at each workstation and your database server.
- 3) Install and configure Windows Server 2008r2, Service Pack 1.
- 4) Install the third-party and media software.
- 5) Install Edify.
- 6) Install Relius Administration Components.
- 7) Install Relius Administration VRU.
- 8) Configure and test the VRU.

To procure a voice card that will be compatible with your server, contact any one of the following vendors:

AD Tech Global	Andy Tourville
CCG Telecom	Jack Turner
I/C Corporation	Bob Guerra

Voice talent for professionally recorded clips can be secured by calling Bruce Hood of Advantages on Hold at 913-649-1444.

Please note: Clients may obtain voice cards and clip recordings from any third-party vendor of their choosing. The businesses listed are provided as a convenience and have no contractual relationship with SunGard Relius other than providing quality professional services to our client base for many years.

**IMPORTANT! There is a known conflict with NMS voice boards and servers running UEFI BIOS. There is no solution to this conflict at this time. As a result servers running this BIOS (such as IBMs X3650 M2 series) cannot be used.**

## Installation and Environment Considerations

### Virus Scanning

Although SunGard Relius does not endorse, support, or recommend any particular method, virus protection is encouraged on servers and workstations. The two most popular are Symantec's Norton Anti-Virus and McAfee VirusScan by Network Associates. You should update your virus definition files regularly. Clients using Norton with Script Blocking turned on should test the functionality of the VRU application to determine whether script blocking is affecting our application. Some virus scanners – if active during the installation – can interfere with a successful installation. Symptoms include an error

message stating that a file cannot be overwritten. Temporarily disable virus scanning before starting the installer.

Below is additional text from Convergys, Edify's parent company, regarding virus protection.

Convergys suggests that all users install virus protection on the Intelligent Voice Portal system. Use of virus scan software on the IVR does not void warranty or maintenance. However, it may require the customer to authorize charges if the customer requires Convergys assistance for removal and restoration service should the virus scan software affect the IVR operation.

Most customers find that their IT department already uses a leading vendors' product, such as Symantec or McAfee Virus Protection software. Both products have been safely installed on our Windows-based systems without difficulty. As with any software install, users are urged to make a complete system backup prior to installation of virus detection software.

#### Note

Be advised that the actual detection and cleaning processes used by either manufacturer's programs are highly CPU intensive. If enabled during IVR production runtime, the scanning slows system response time.

Customers are advised to configure the virus scan to run during periods when the IVR can be taken out of runtime, or when caller traffic is low.

In addition, limit the scanning to local disks only. Real time scanning should be monitored to determine the degree it is affecting system performance. If performance is an issue, most real time scanning utilities can be configured to exclude certain files types and folders.

### User Account Control

Edify's installation instructions and field notes require that a user with local Administrator rights must run the installation. If SunGard Relius staged your VRU, a user by the name of iviAdmin with the password of Relius was created. If your server has not yet been staged, instructions for staging the server are detailed in this document. Edify also requires that this password not be changed. If the password is changed, the Workforce Administrator will not operate. The "machine name" of your VRU must also remain the same.

### Backing up Your Existing Edify Configuration

You are encouraged to make note of the Dial Table settings, especially your "Transfer Feature Codes," in the EVIP Telephony configuration (*Start | Programs | Edify | Administration | Configuration Editor*). These settings are vital to ensuring the new (or newly configured) VRU will answer, transfer, and disconnect calls without any errors:

- Select the Telephony subsystem and click the Properties button. The Telephony Configuration window will appear.

- Click the Line Types button in Telephony Configuration. It is in these settings where the Transfer Feature Codes (in the “Transfers” tab) will need to be written down or saved to a text file to match configurations in the new server.
- Click the Dial Tables button in the Telephony Configuration screen. Make a note of your Dial Tables.
- Note: if you are migrating to EVIP 13.0 on the same physical server as your existing VRU, any files created for saving configuration information will have to be copied off the server or they will get lost when the system’s drives are formatted.

Below is text taken directly from the Edify Installation Guide (with added emphasis):

The EVIP Configuration Editor has a feature that allows settings from one EVIP system to be quickly migrated to another computer, speeding up the time necessary to configure multiple systems. Though it is possible to migrate your configuration settings between computers containing the same version of EVIP, **be aware that EVIP does not support migrating configuration settings between systems with different versions of EVIP.**

Because of this, it will be necessary to take note of all your EVIP configuration settings, and manually apply them to your new EVIP 13.0 system. However, though it will be necessary to manually configure the first EVIP 13.0 system, you can subsequently use the Configuration Editor import/export feature to migrate those settings to your other EVIP 13.0 computers.

### Backups of voice files

If you already have an existing Relius Administration VRU on Windows 2003, you need to back up your voice files (normally located in C:\Qtech) before formatting your server and installing Windows Server 2008r2. Backing these files up can include copying to another server, burning to CD or DVD, copying to an external USB drive, or using a backup tape. Once you have finished the installations, restore those voice files to C:\Qtech. There will be a utility provided to convert the voice files to an updated format.

### Virtual Environments

SunGard Relius has begun testing and developing on virtual environments. Because virtual environments entail sharing of hardware resources, it is not possible to use a physical NMS Voice Card on a virtual system. If you wish to use a virtual system, you **must** switch your telephony infrastructure to Voice Over IP. Plan accordingly.

**Note: At this time, only VMWare ESXi 5.1.0 and VMWare ESX 515 (using vSphere Client and vCenter 5.1.0) are supported by Edify.**

### Obtain Edify software (and if necessary VOIP licenses)

Edify software is obtained from Relius Technology Support. Please contact Relius Technology Support or your sales representative. You will receive (or download) approximately four CDs, depending on your configuration. Keep these CDs in a safe location, as there may be a fee to acquire replacements.

There is no additional cost to upgrade to the current version of Edify. The upgrade is part of your regular license fees paid through SunGard Relius. However, if you plan to switch from the traditional analog voice lines to Voice Over IP/Host Media Processing (VOIP/HMP), there will be an extra cost for

the licenses and maintenance fees associated with this new technology. Contact your sales representative for further details.

## Ensure correct hardware and telephony are in place

### Appropriate server

Below are the minimum requirements for the server that you will need:

- Server class hardware fully supporting x64 architecture
- Intel dual core or higher processor at 2.0 GHz
- 4 GB RAM
- 300 GB Hard Drive
- Windows Server 2008r2 Standard Edition with Service Pack 1
- PCI slot supporting the type of voice card you plan to use

**NOTE: Only Windows 2008r2 is supported**, Windows 2012 or any other OS may not be used.

If you are going to use your existing server and convert it to Windows Server 2008r2, make a safe copy of C:\Qttech (the location of your voice files. These will be needed in the new system. It is imperative that these files be copied to a safe location. Failure to do so will result in the need to re-record all of your voice clips since your first installation.

Also bear in mind that neither Edify nor SunGard Relius support upgrading an operating system. You **must** install the OS to a freshly formatted hard drive.

### Analog lines

Your existing AG-2000 voice card is fully supported as long as your new x64 hardware can fit the voice card. Because of the size and type (traditional PCI) of this card, you may have trouble finding a new server that will accommodate the necessary space and slot. There are multiple revisions of this card with different varieties of the PCI bus but all of them are traditional PCI cards (either 5 volt or 3 volt) rather than the more current PCIe commonly found in new servers. High-end developer workstations may be used for the VRU but the physical size of the AG2000 card will need to be considered.

If you remove your current voice card to look at the slot configuration remember to mark the phone lines connected before doing so and plug each line into the same port it was removed from when replacing the card.

Note: Digital cards that may be supported by Edify have not been tested by SunGard Relius and are therefore not supported.

### VOIP/HMP system

Edify and Dialogic require additional licensing fees for this technology, however this option is less expensive than a new voice card (provided your telephone system can be easily configured to call into the server). **Check with your telephone vender to determine the costs and adjustments necessary before committing to this particular method.** VoIP also requires a strong understanding of the technology by its users. It will be quite common for customers to need to bring consultants in to make system adjustments to allow the VRU system to interact with the VOIP system. Technical support from

Relius Administration will be extremely limited due to the complexities and varying types and brands of phone systems in use.

**Important Note: The license file provided by Dialogic and Edify is tied to the MAC address of the network card you will be using on your system. Users who opt for a VOIP environment need to specify that the MAC ID must remain static. Ideally, if using a virtual server host, the administrator will dedicate a NIC to that particular virtual machine and leave it in place. If the VM is moved or a new physical network card is used, causing the environment to use a new MAC ID, the user will have to obtain a new license file from Edify.**

## Preliminary setup

### Install Win2008r2

Windows Server 2008r2 (Standard or Enterprise) must be installed to the local C: drive of your server. Your system drive should be a minimum of 300 GB. The system drive must be formatted as NTFS. A local administrator by the name of iviAdmin must be created. This user must be used for all Edify installation and configuration tasks. Additionally, create a local user group on the server called IviGrp and add the iviAdmin user to the group.

Do not configure the VRU as a domain controller, database server, or web server. These resource-intensive roles will diminish the abilities of your VRU. SunGard Relius and Edify strongly encourage you to make certain that this system is a dedicated VRU serving no other task.

Most tasks require administrative privileges. SunGard Relius **does not** encourage disabling User Account Control. Once everything is configured, you may set up shortcuts to run tasks as administrator.

### Install Windows SP1

When the server has been configured, install the Windows Service Pack 1 to the environment. This installation may take several hours and require that the server be restarted several times.

### Install Internet Explorer 9 (or higher)

Edify requires Internet Explorer to be at a minimum level of version 9. Testing in the labs of SunGard Relius have been primarily on version 11 due to corporate security requirements.

### Install all necessary patches

Using Windows Update, install all security updates and system patches. Your server should always be kept up-to-date to avoid vulnerabilities and programming flaws.

## Edify setup

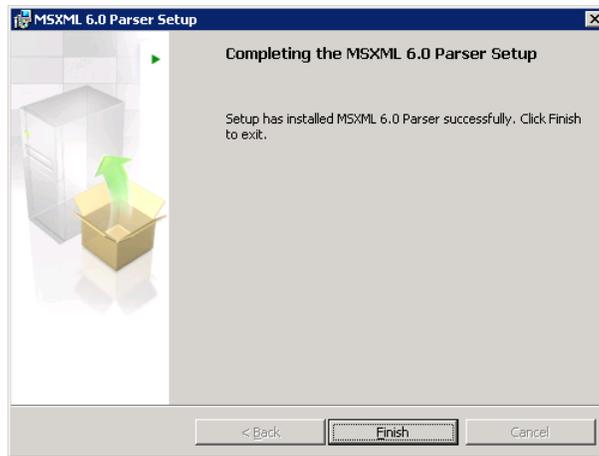
### Install third party software from Edify

The first Edify CD to use is the "Third Party" CD. Not every component on the CD is necessary for a SunGard Relius VRU. At a minimum, please install the following software packages:

- MSXML 6.0 SP3 (msxml6.msi on the CD)
- Microsoft SOAP Toolkit 3.0 (soapsdk.exe on the CD)
- Java Runtime Engine 1.7 update 7 (jdk-7u7-windows-i586.exe on the CD)
- Microsoft Visual C++ 2010 x86 Redistributable (vcredist\_x86.exe on the CD)

## Install MSXML 6.0

From the Edify “Third Party” CD, double-click **msxml6.msi**. It is a very quick unattended installation. The only screen that will require your attention is the completion screen. Click **Finish**.

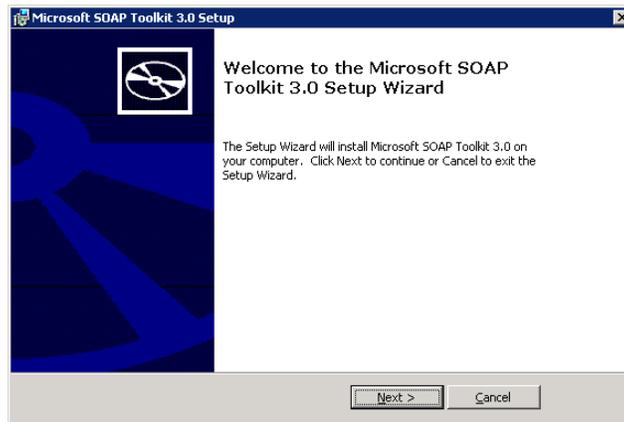


## Install Microsoft SOAP Toolkit 3.0

From the Edify “Third Party” CD, double-click **soapsdk.exe**. You’ll be prompted to begin the installation. Click **Yes**.



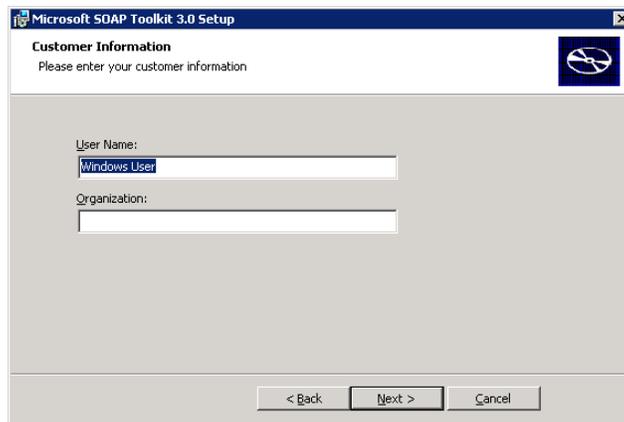
Click **Next** at the welcome screen.



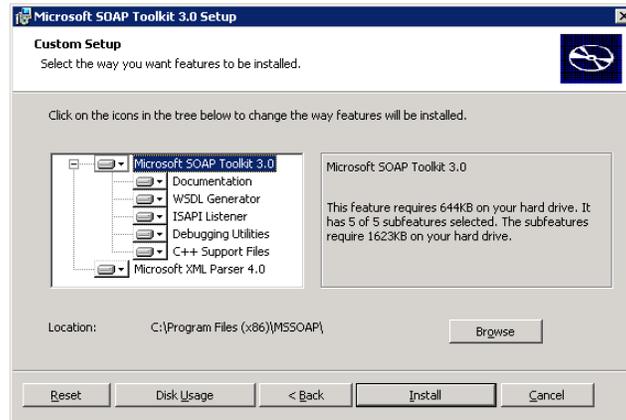
Click *"I accept the terms in the License Agreement"* and click **Next**.



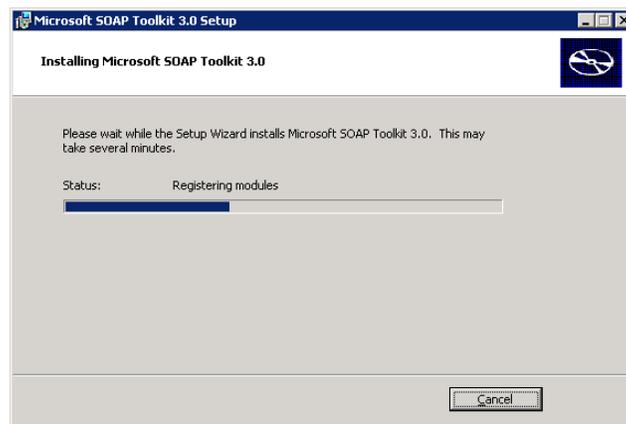
Enter your relevant customer information and click **Next**.



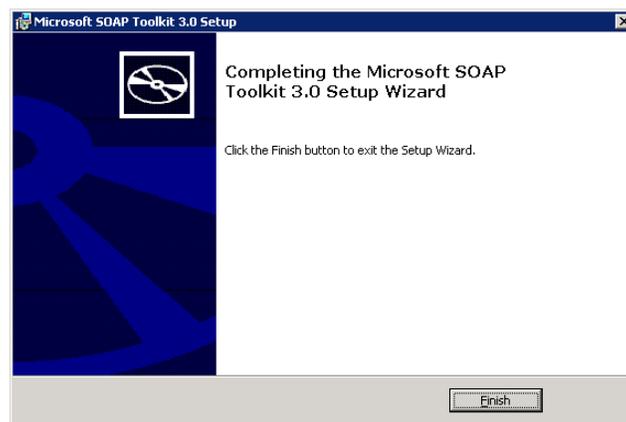
At the Custom Setup screen, leave all the options as they are (full install) and click **Next**. If prompted for elevation, choose **Yes**.



The installation will then proceed.



Click **Finish** when the installation has ended.

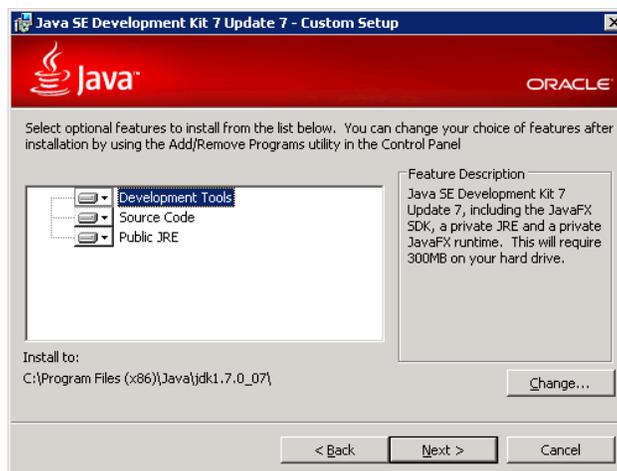


## Install Java Runtime Engine

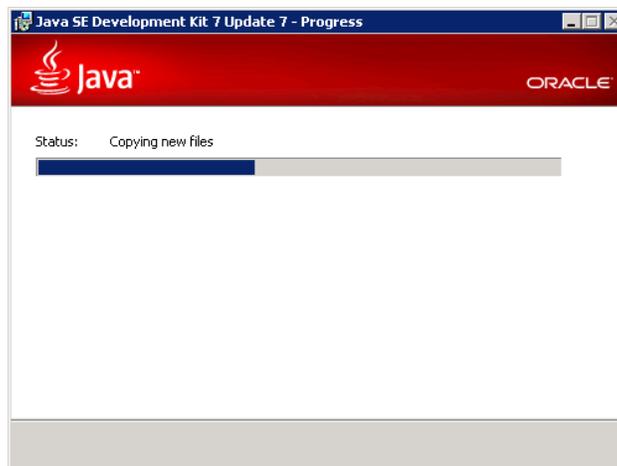
From the Edify “Third Party” CD, double-click **jdk-7u7-windows-i586.exe**. Click **Next** at the welcome screen.



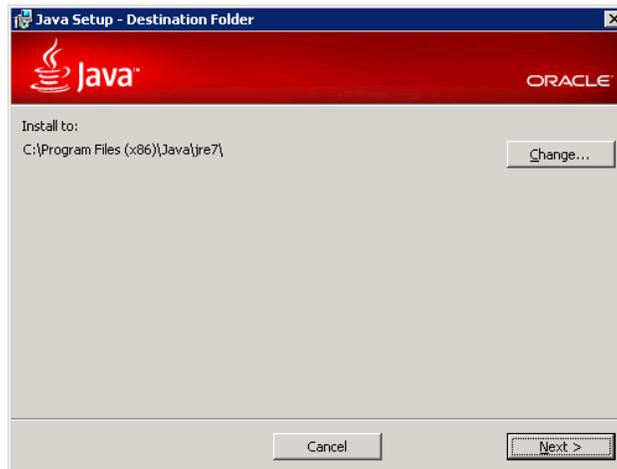
At the Custom Setup screen, leave the options as they are (full install) and click **Next**.



The installation will extract.



Leave the destination folder at the default and click **Next**.



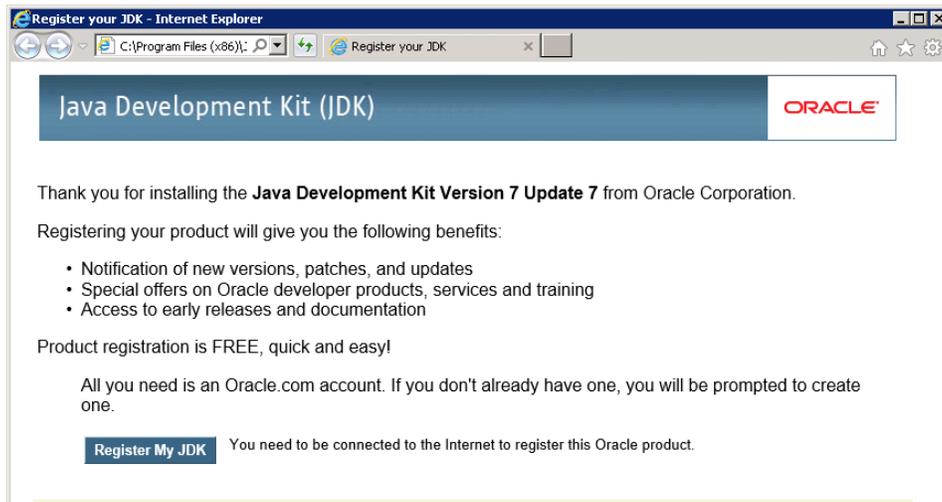
Java will install.



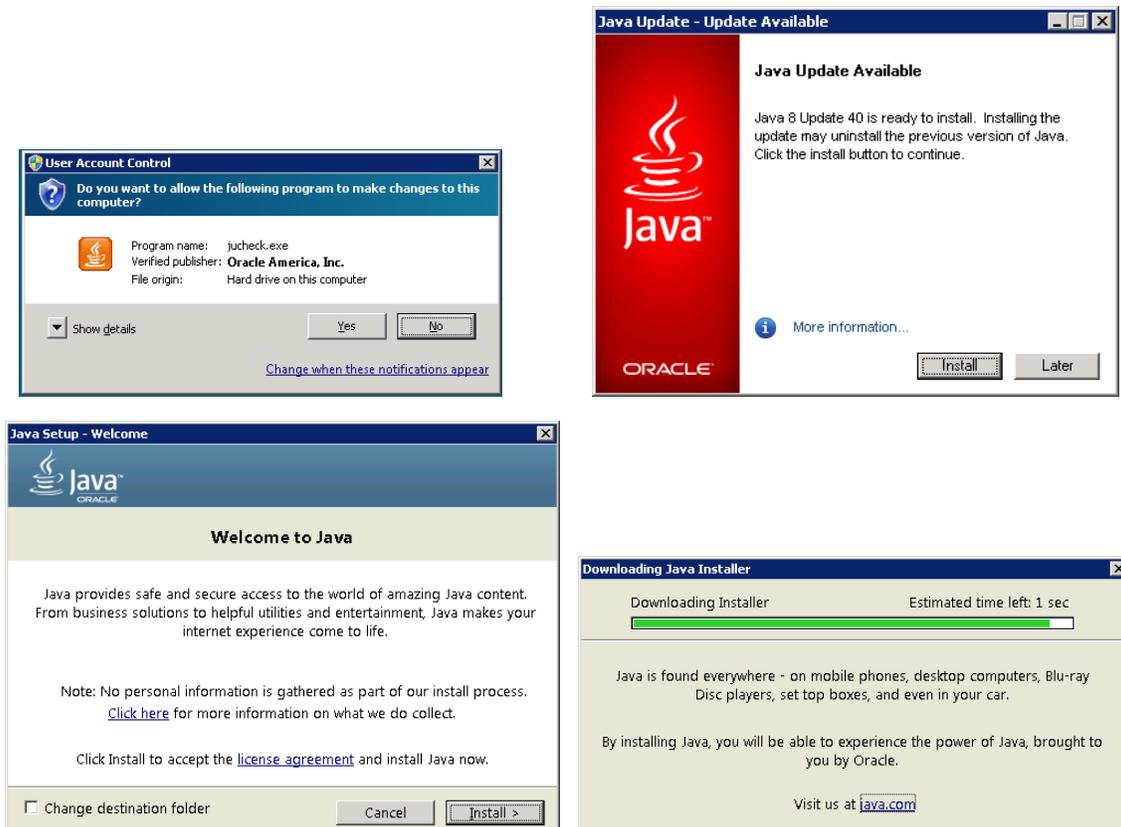
At the final screen click **Close**.



A browser window may open to prompt you for registering Java. This is optional.



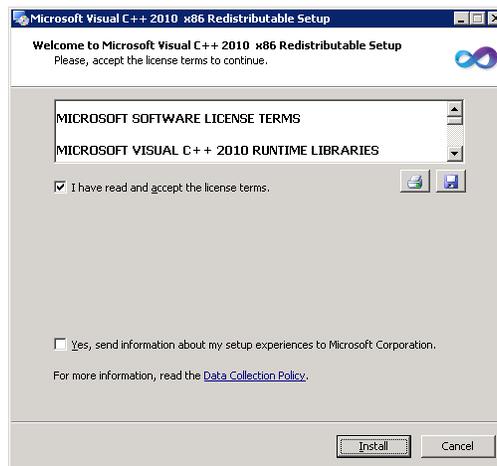
Java will occasionally require updates. When prompted for these updates, you should run them, as the updates are usually distributed to patch security vulnerabilities.



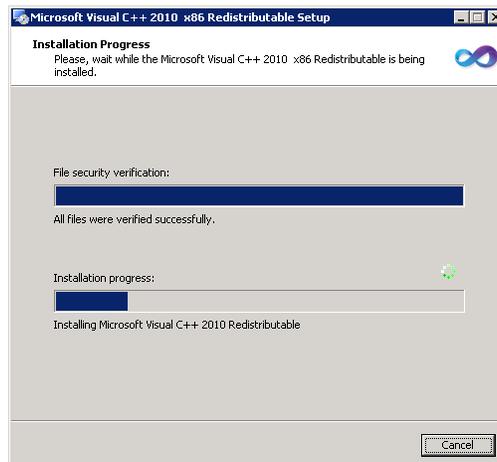


### Installing Microsoft Visual C++ 2010

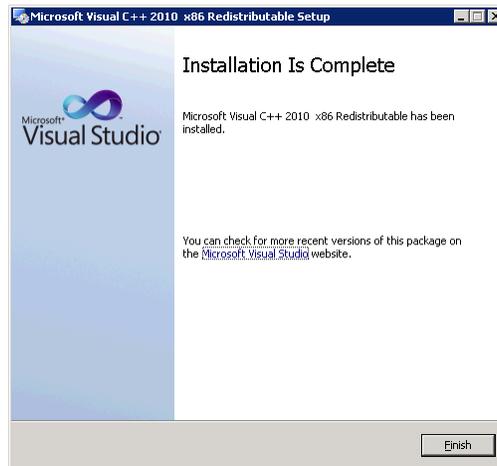
From the Edify “Third Party” CD, double-click **vcredist\_x86.exe**. After the files are extracted, click “*I have read and accept the license terms*” and click **Install**.



The installation will proceed.



When the installation has completed, click **Finish**.



### Install Edify Media Software

Depending on the type of telephony system you will be using, you will receive one Media Server CD. If you are going to use your AG-2000 analog voice card, you will receive the Media Server 6.0 (NMS PSTN) Installation CD. If you choose to convert to VOIP, you will receive the Media Server 6.0 (VOIP) Installation CD. Choose only one method and skip the other.

Log on as the *iviAdmin* user to run these installations. Each is designed to run several installations consecutively, with frequent system restarts. After your server has restarted, you must log on as the *iviAdmin* user. After logging back on, you will be prompted to continue the installation. Do not cancel it. Allow the installation and system restarts to continue until you are informed that the installations are complete.

### Installing Media Server for NMS PSTN

***If using Voice Over IP, this section must be skipped. The following text is taken directly from the Edify Installation Guide. Screen shots are added for ease of reference. Some items are adjusted to meet the specific needs of Relius users.***

The install procedure allows you to install Media Server for NMS PSTN (with NMS telephony hardware).

1. Log into the **iviadmin** account with the appropriate password.
2. Open Windows Explorer and navigate to the DVD.
3. Right-click **intv.exe** and select **Run as Administrator** to begin the installation.

4. In the User Account Control window, click **Yes** to continue.



5. In the installation program, click **Preinstall Check**. The installation wizard generates and opens a preinstallation report that lists any compliance issues. The report may take a few moments to display.
6. Check the report for issues that need corrective user action. In particular, evaluate anything in the report labeled as a WARNING, and correct anything listed as FAIL.
7. Close the preinstallation report.
8. Click **Full Product Installation**. The Computer Management window opens.
9. Close the Computer Management window.
10. On the Media Server installation wizard, click **Next**.

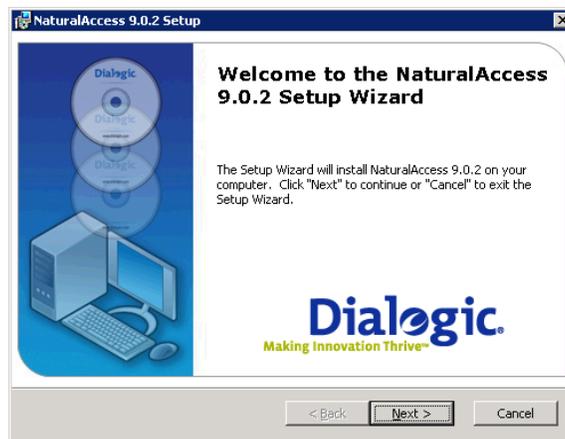


11. Select the drive location from the list.

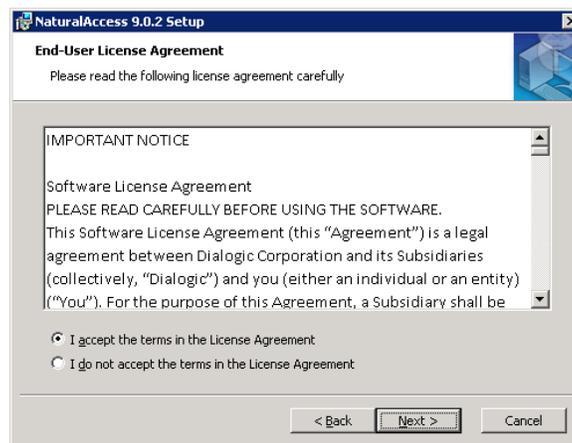


12. Click **Start Install**. Installation begins and a confirmation message opens.

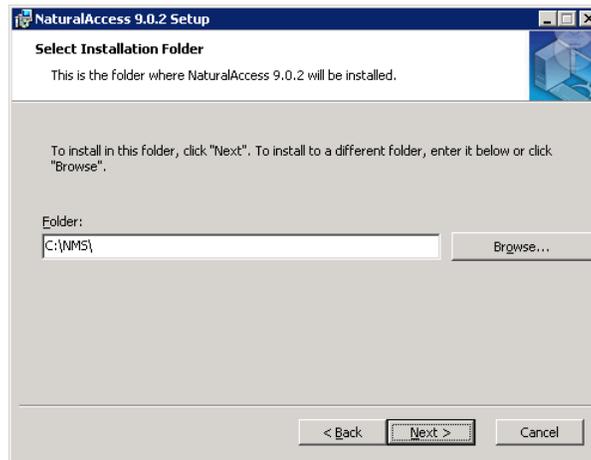
13. On the Natural Access Welcome screen, click **Next**.



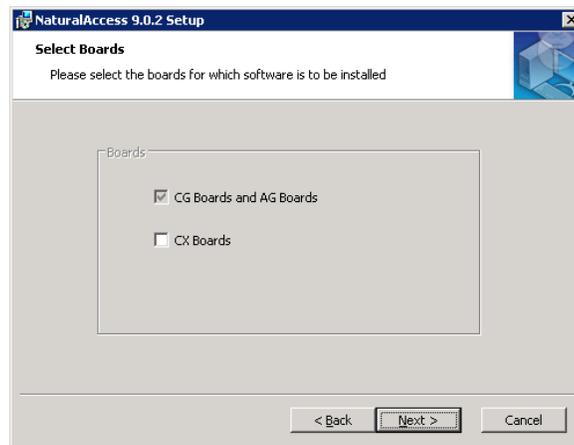
14. Read the Software License Agreement. If you accept the terms, click **I accept the terms...**, and click **Next**.



15. In the **Folder** field, enter **C:\NMS\** (or the drive you have chosen), and click **Next**.



16. On the Selects Boards screen, ensure the CG Boards and AG Baords checkbox is selected, and click **Next**.

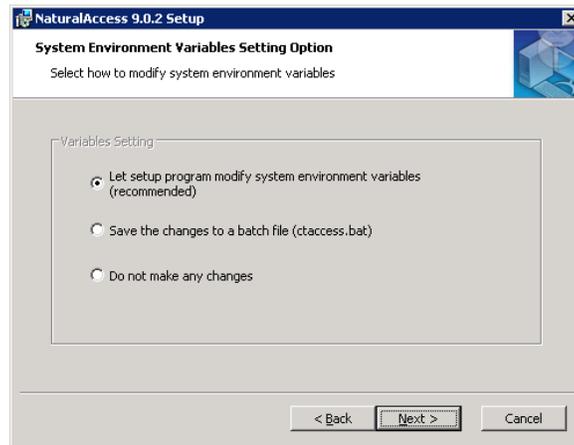


17. On the next screen, select your country [for example, usa (United States)] and click **Next**.

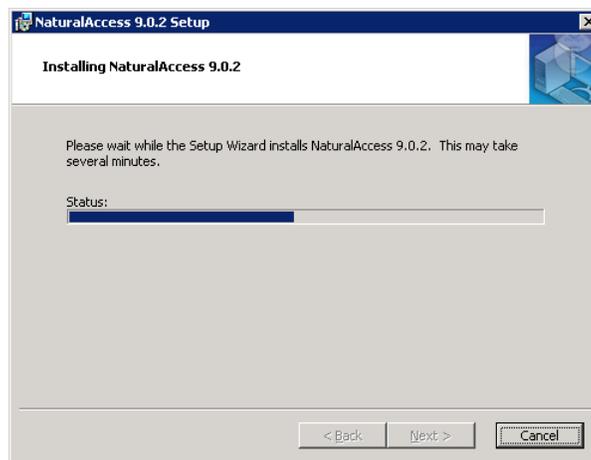
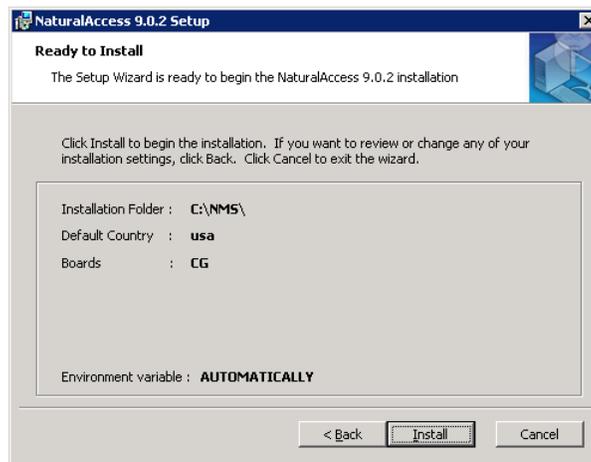
Note: If more than one Country is checked, you are prompted to select a default Country on a subsequent screen.



18. Accept the default environment variables setting by clicking **Next**.



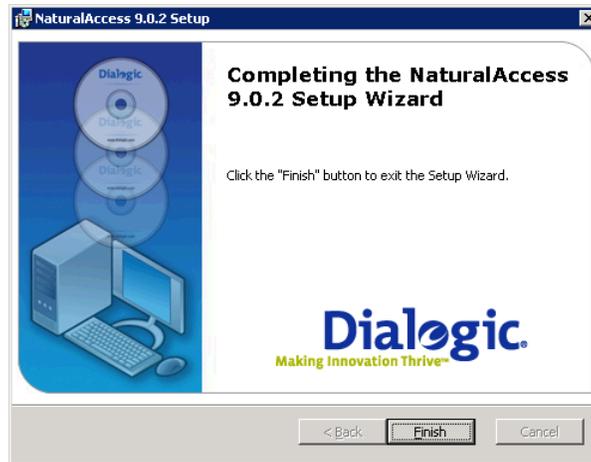
19. Click **Install**.



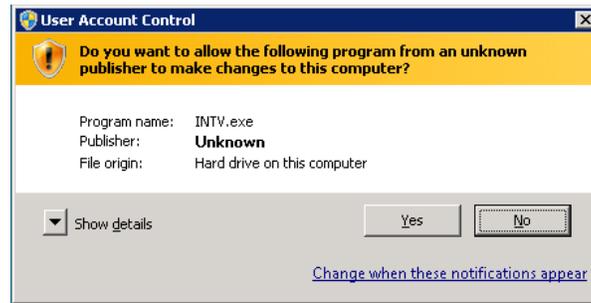
20. Note: You may be prompted by one or more of the security warnings shown below. It is important to click "Install this driver software anyway."



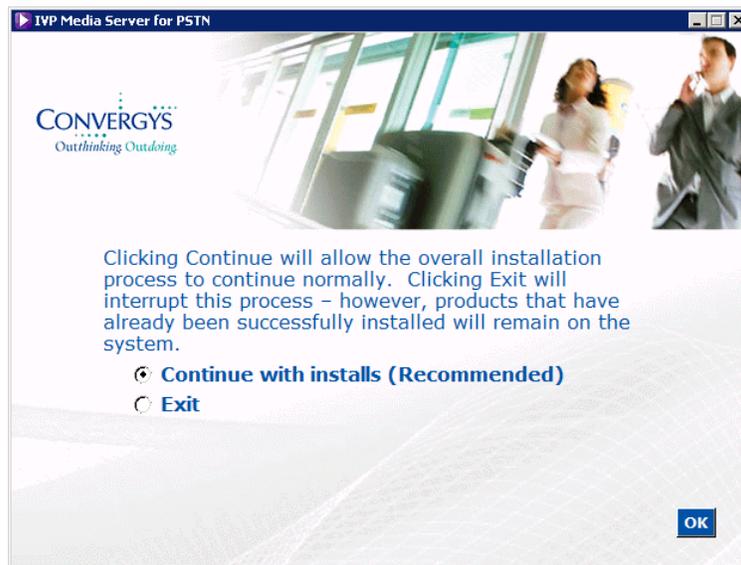
21. Click **Finish**. The computer reboots automatically.



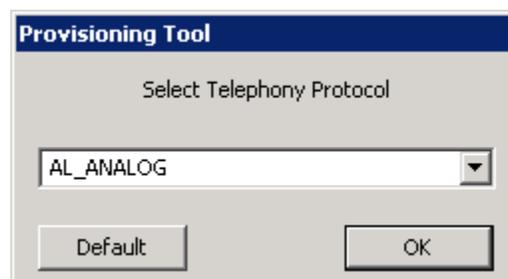
22. When the computer restarts, click **Yes** in the UAC window to continue.



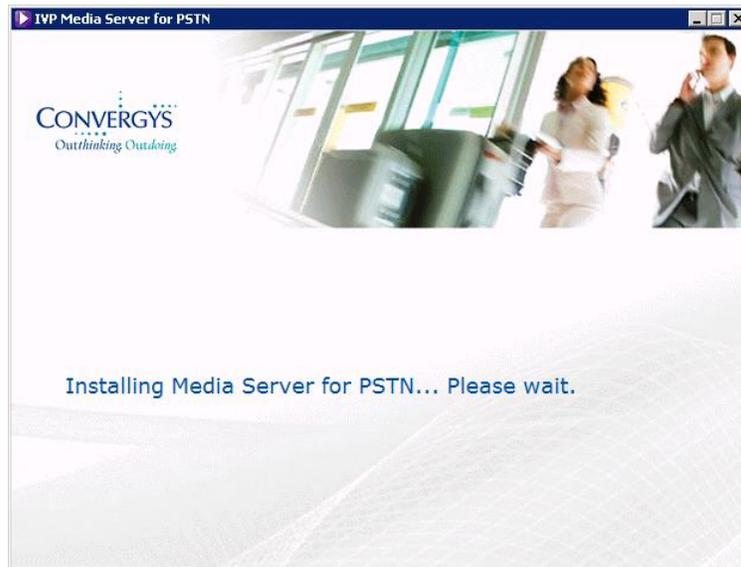
23. In the installation program, ensure that **Continue with installs** is checked and click **OK**.



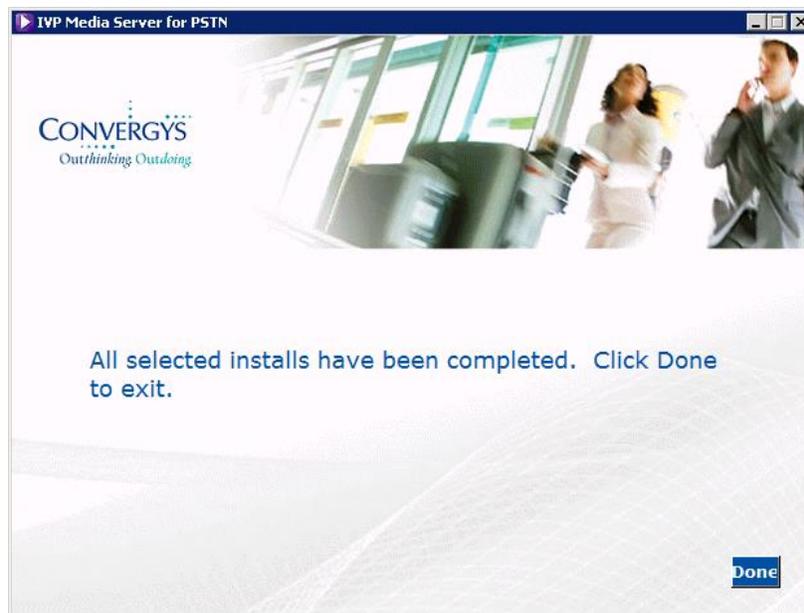
24. The Provisioning Tool window opens. Select the telephony protocol from the list and click **OK**.



25. Wait for the installation to finish (this may take several minutes).



26. Click **Done** to close the Installation window.



#### Installing Media Server for VOIP

**If using physical voice cards, such as the AG-2000, this section must be skipped.** The following text is taken directly from the Edify Installation Guide. Some items are adjusted to meet the specific needs of Relius users.

1. Log into the **ivadmin** account with the appropriate password.
2. Open Windows Explorer and navigate to the DVD.
3. Right-click **intv.exe** and select **Run as Administrator** to begin the installation.
4. In the User Account Control window, click **Yes** to continue.

5. In the installation program, click **Preinstall Check**. The installation wizard generates and opens a preinstallation report that lists any compliance issues. The report may take several moments to display.
6. Check the report for issues that need corrective user action. In particular, evaluate anything in the report labeled as a **WARNING**, and correct anything listed as **FAIL**.
7. Close the preinstallation report.
8. Click **Full Product Installation**.
9. Wait for the Computer Management window to open.
10. Expand **Local Users and Groups** and select **Groups** to add **ivadmin** to **IviGrp**:
  - a. Double-click **IviGrp**.
  - b. Click **Add**.
  - c. Click **Advanced**.
  - d. Click **Find Now**.
  - e. From the list, select **ivadmin**.
  - f. Click **OK** three times.
  - g. Close the Computer Management window.
11. On the installation wizard, click **Next**.
12. Select the drive location from the list.
13. Click **Start Install**. Installation begins and a confirmation message opens.
14. If a Windows Security window opens, select the **Always trust software from "Dialogic Corporation"** checkbox and click **Install**. Wait for the installation to finish (this may take several minutes).

The system automatically reboots.

15. Log in using the **ivadmin** account.
16. If the installation program does not open, you must launch the installation again:
  - a. Open Windows Explorer and navigate to the DVD.
  - b. Right-click **intv.exe** and select **Run as Administrator** to begin the installation.
  - c. In the User Account Control window, click **Yes** to continue.
17. In the installation program, ensure that **Continue with installs** is selected and click **OK**.

The installation continues. A batch window opens and displays the progress of the installation. Wait for the installation process to finish and a confirmation message opens.

The Provisioning Tool opens.



18. Select the telephony protocol used in your environment. By default, **UL\_VOIP\_ENTERPRISE** is selected.

19. Click **OK**. Installation continues. You are prompted to supply a Dialogic HMP 3.0 license.

**Note**

Convergys provides you with the Dialogic HMP 3.0 license when you purchase Media Server for VoIP.

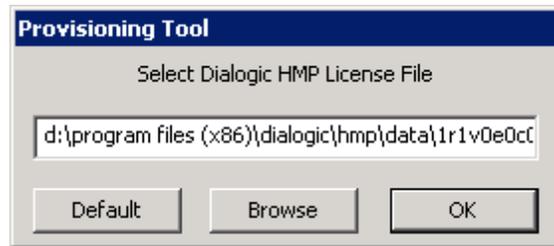
If you do **not** have the Dialogic HMP 3.0 license available, click **OK** and go to step 21.

**Critical**

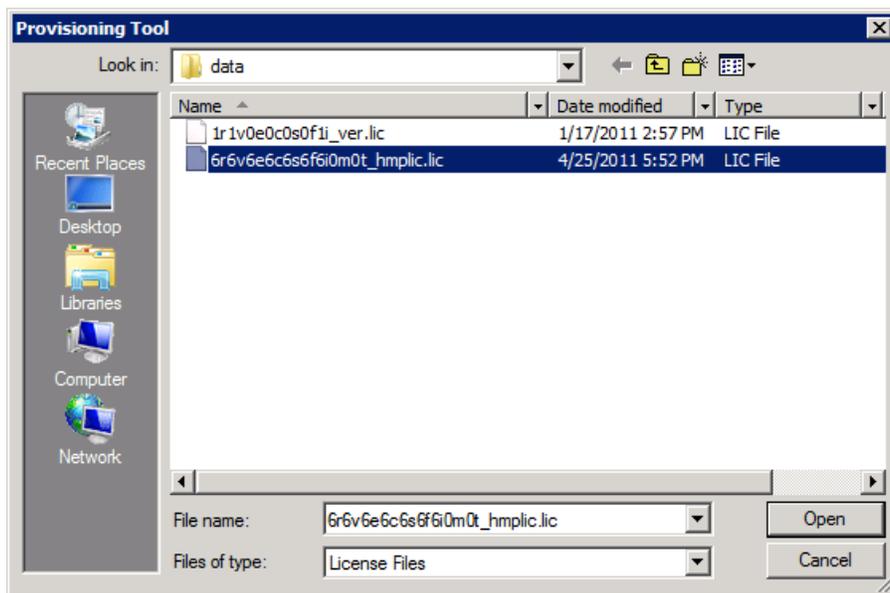
The Provisioning Tool configures using the default Dialogic HMP license. However, this default license is not compatible with Media Server 6.0. You will need to obtain a production Dialogic HMP license to configure your Media Server later in the process.

20. If you have the Dialogic HMP license available, then:

- a. Copy the Dialogic HMP license file (for example, **96r96v0e0c96s0f96i0m.lic**) to **~\ProgramData\Dialogic\HMP\data**.
- b. On the Provisioning Tool window, click **Browse**.

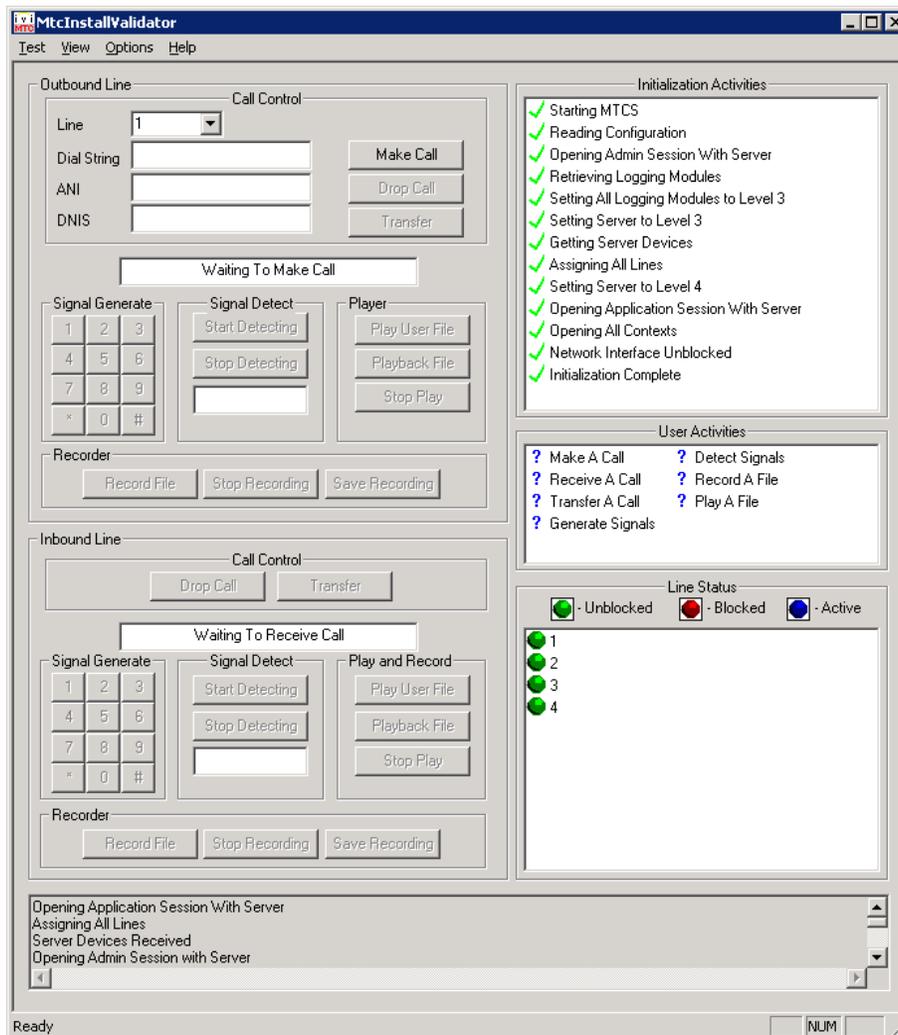


- c. Navigate to the **~\ProgramData\Dialogic\HMP\data** folder and select the Dialogic HMP license file.



- d. Click **Open**.
  - e. On the Provisioning Tool window, click **OK**. Installation continues.
21. Click **Done** to close the Installation window.

After installing the Dialogic VOIP stuff **and before installing Edify**, there is a utility that can be used to determine if the phone system and VRU are working together. In **C:\Program Files (x86)\Intervoice\Media Server for VOIP\sys** double-click **mtcinstallvalidator.exe**. In the window, click **Test / Start Test**. (If Edify is installed, it must be down to run this test.) In the “Initialization Activities” pane, if all items are checked green, the VIOP system is ready to receive a call. If not, this is where you’ll need your telephony vendor and network engineer to troubleshoot your environment.



## Install EVIP 13

*The following text is taken directly from the Edify Installation Guide. Screen shots are added for ease of reference. Some items are adjusted to meet the specific needs of Relius users.*

### Note

The IVP Hardware locator needs to be running. During installation, EVIP attempts to add your Telephony board automatically to its configuration settings. If using Dialogic HMP, you must have the HMP software running prior to starting the EVIP installation. If not, the autoconfiguration will not work, and you will manually have to add your board settings in the EVIP Configuration Editor.

You need the following to install the EVIP software:

- The EVIP CD ROM
- The Options/Agents disk

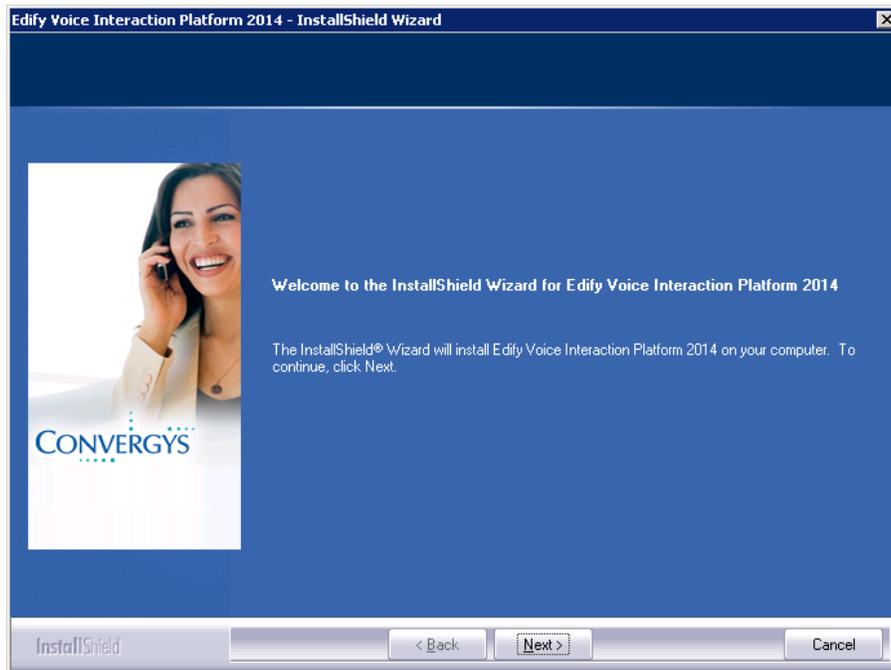
### Note

The license/options diskette is labeled "Options/Agents Disk" and support personnel often call it the "options diskette." However, the installation dialog windows displays the term, "license." In this document, "options" and "license" mean the same thing.

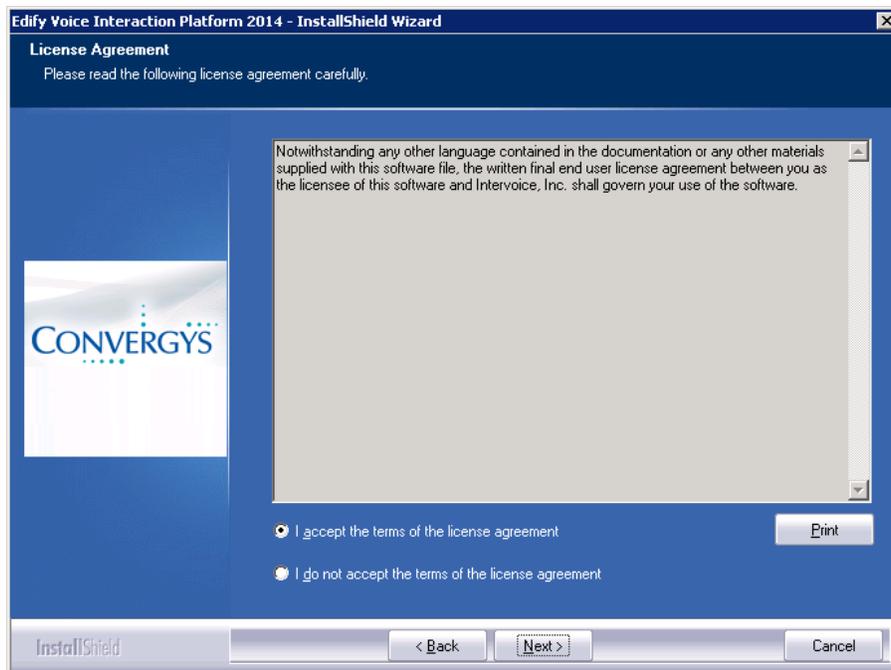
To Install the EVIP Software:

1. Log onto the computer where you want to install EVIP with the user account that is a member of the Administrators group.
2. Choose **Start > Run as Administrator** to run the EVIP Setup Program.
3. If a User Account Control window opens, select **Yes** to continue.
4. In the **Open** field, enter **[x:\]setup**, where **[x:\]** is the drive letter and path where the setup program is located.
5. If you see an Open File security warning, click **Run**.

6. The EVIP installation wizard opens. Click **Next**.

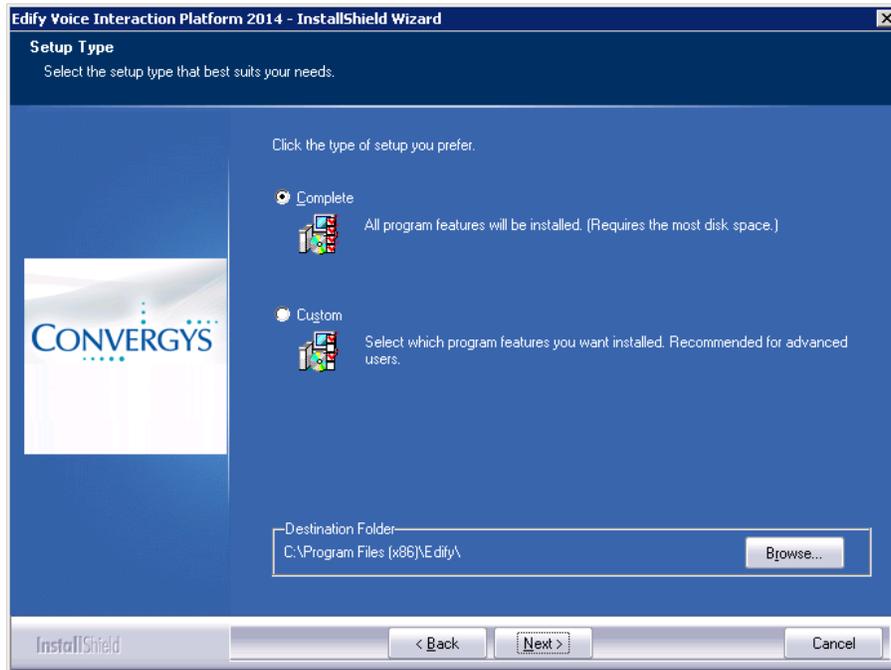


7. The EVIP License Agreement screen opens. Read the license agreement, and click **I accept the terms of the license agreement**.
8. Click **Next**.



9. The Setup Type/Destination Folder screen opens. Click **Complete**.

10. For the Destination Folder, install in the default directory (~\Program Files (x86)\Edify). Click **Next**.



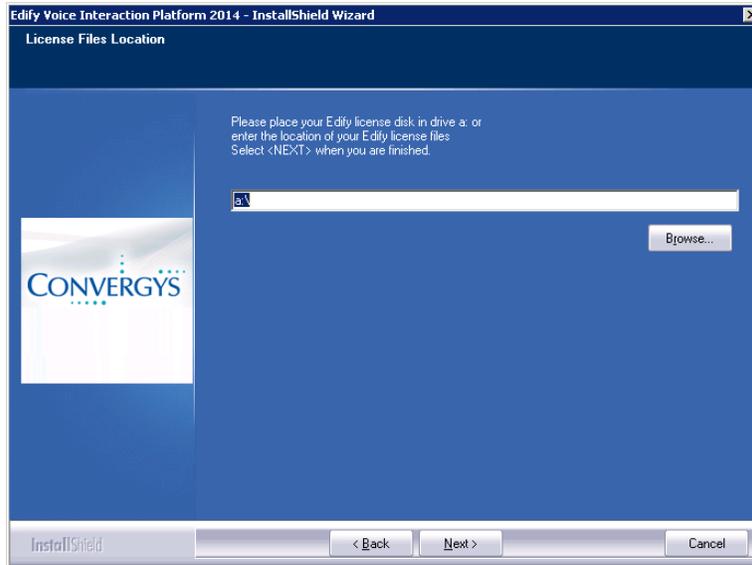
11. The License File Location screen opens. Insert your license disk (or click **Browse** to choose the location of your license files), and click **Next**. The Start Copying Files screen appears.

**Note**

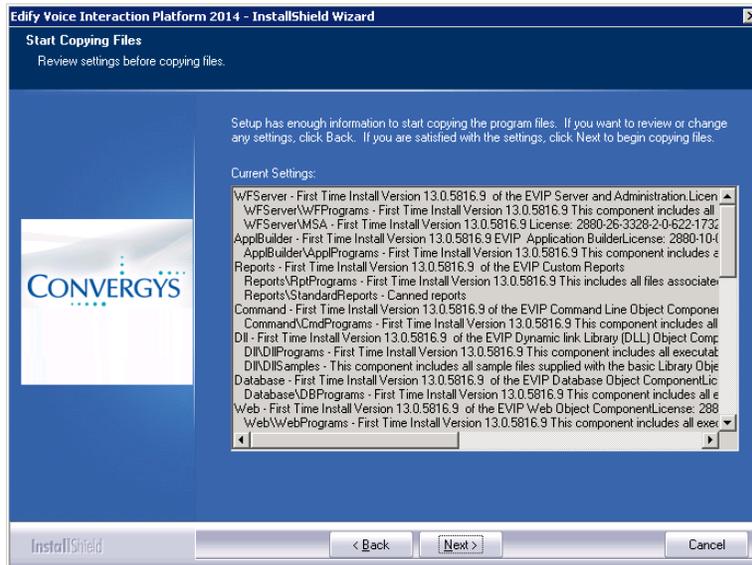
During a first-time installation, a checkmark appears next to each option found on your Options disk. Do not uncheck an option if you want to install all the options licensed for your system.

If essential third-party software is not installed on your system prior to performing the EVIP installation, the EVIP Installer deselects features from the list, even if the license file contains the option. An alert will typically notify you of missing software.

Because the options are keyed to the serial number of the system, they cannot be installed on another system. There is no reason not to install all the options you have purchased (unless instructed by Convergy's for troubleshooting).



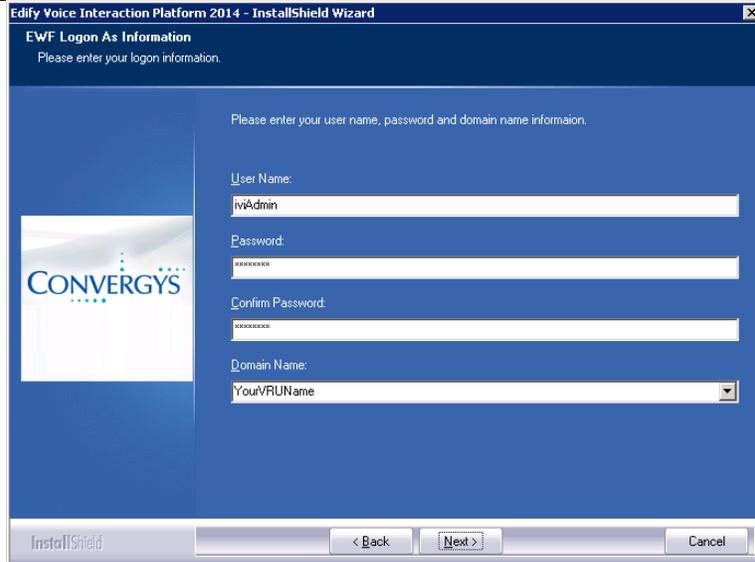
12. Select the components you want to install, then click **Next**. The Start Copying Files screen opens.



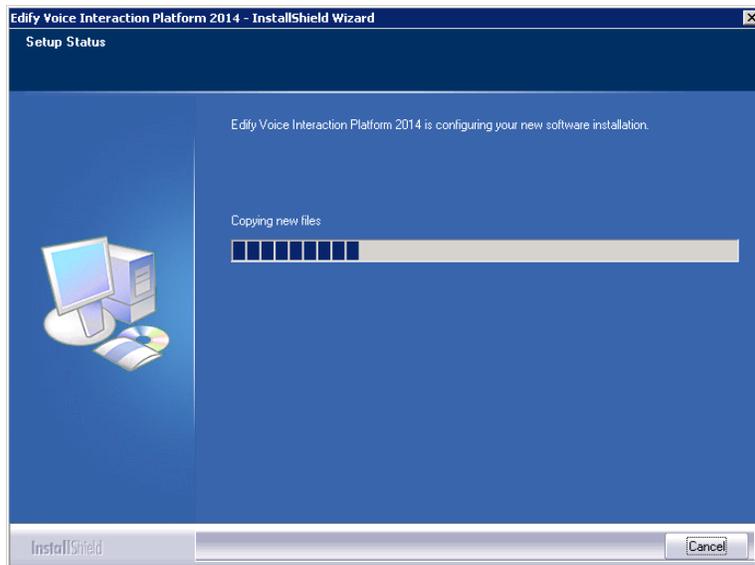
13. Review the settings, and then click **Next**.

14. The EWF Logon As Information screen opens. Enter the following settings in the EWF Logon As Information window:

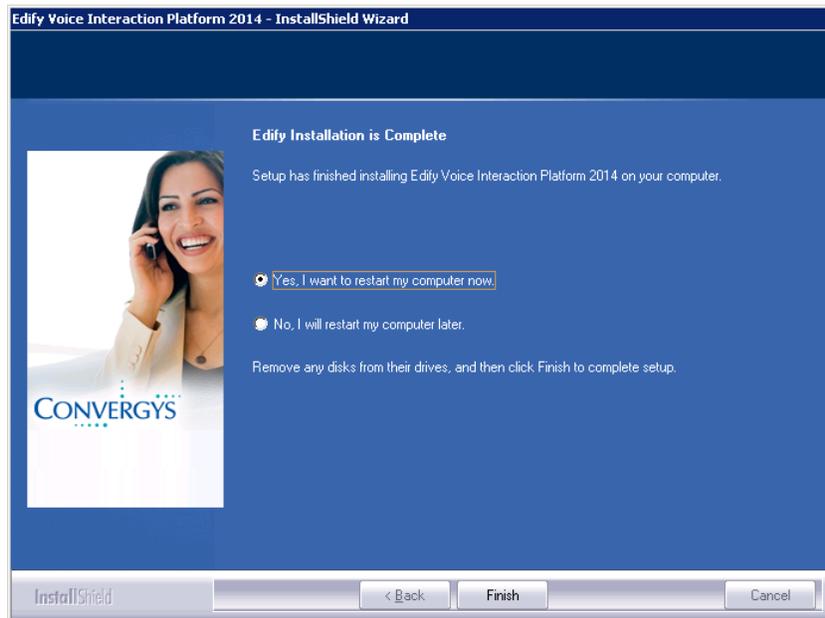
Setting	Value
<b>User Name</b>	The name of the Edify Service User. The EVIP Service User is the logon for the Electronic Workforce Service. It must be a member of the Local Administrators group.
<b>Password</b>	The password for the user you entered in the User Name field.
<b>Confirm Password</b>	The password for the user you entered in the User Name field.
<b>Domain Name</b>	The domain of the user you entered for the User Name.



15. Click **Next**. The Setup Status screen appears while the installation is running. When the installation is complete, the EVIP Installation is Complete screen opens.



16. Click **Yes, I want to restart my computer now**, then click **Finish**.

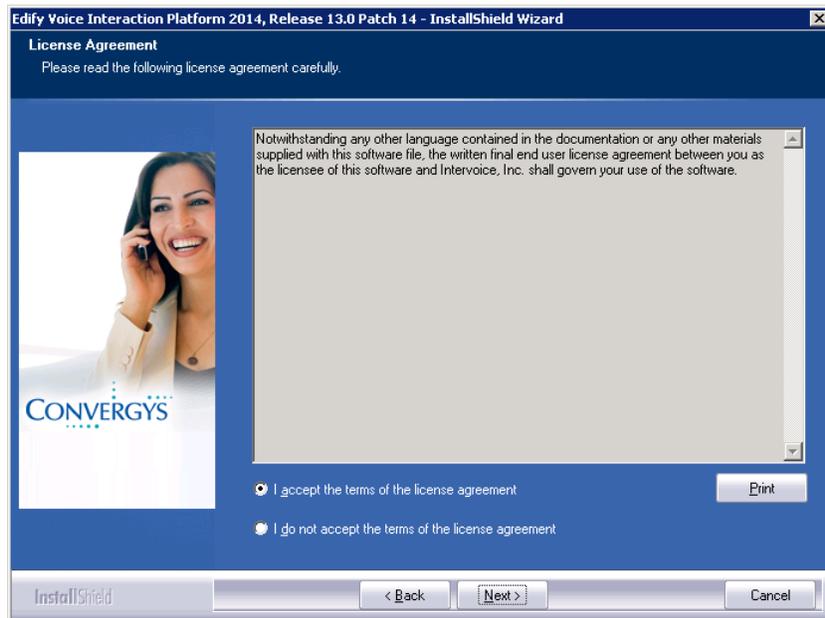


### Install Patch 14 to Edify 13

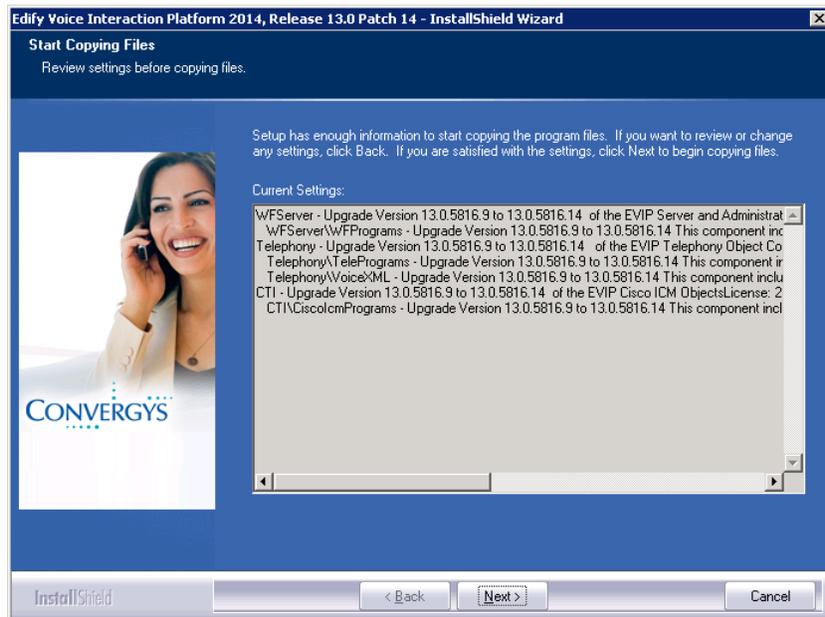
1. Shut down Edify.
2. Set Electronic Workforce service to **Manual**.
3. Reboot.
4. Download **R130P14.exe** from the SunGard Relius Support site.
5. Double-click **R130P14.exe**. This will extract to a folder by the same name.
6. Double-click the **R130P14** folder.
7. Double-click **Setup.exe**. When prompted for elevated privileges, click **Yes**.
8. At the welcome screen, click **Next**.



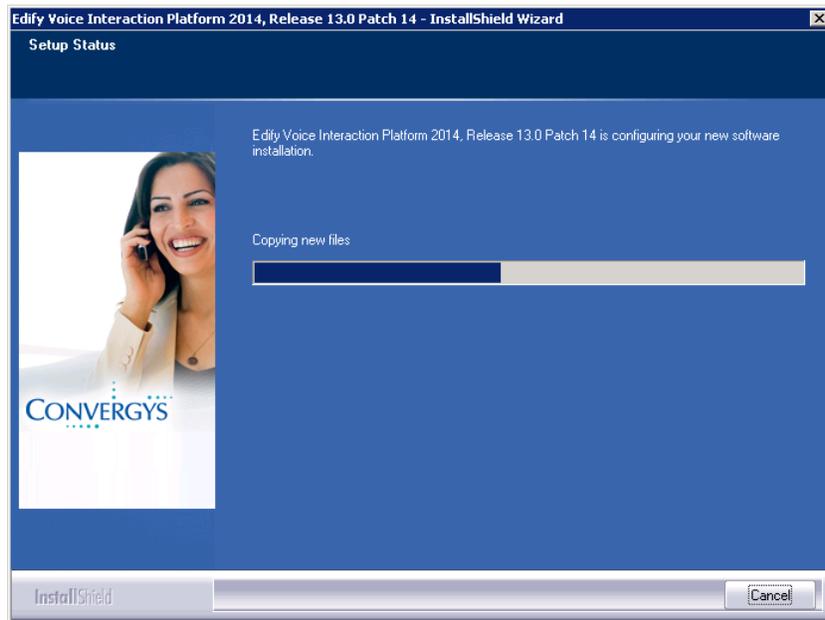
9. Accept the license agreement and click **Next**.



10. Review the settings that will be upgraded and click **Next** when ready.



11. The installation will copy files.



12. When prompted, click **Yes, I want to restart my computer now** and click **Finish**.



- When you are finished logging back on, open a Command Prompt and type **ewfver** to review the patch level. If your “Highest Patch number” and “Patch List” are at 14 or higher, your system is ready to use.

```

Administrator: Command Prompt
C:\Windows\system32>ewfver
Company Name:          Convergys
Product Name Long:    Edify Voice Interaction Platform 2014
Product Name Short:   EUIP
Copyright:            Copyright 1998-2014 Convergys Corp. All rights reserved.

Build number          = 5816
Build Configuration   = R
Highest Patch number  = 14
Patch List            = 14
Build Patch List      = 5816.14

Version number        = Version 13.0
Major Version Number  = 13
Minor Version Number  = 0

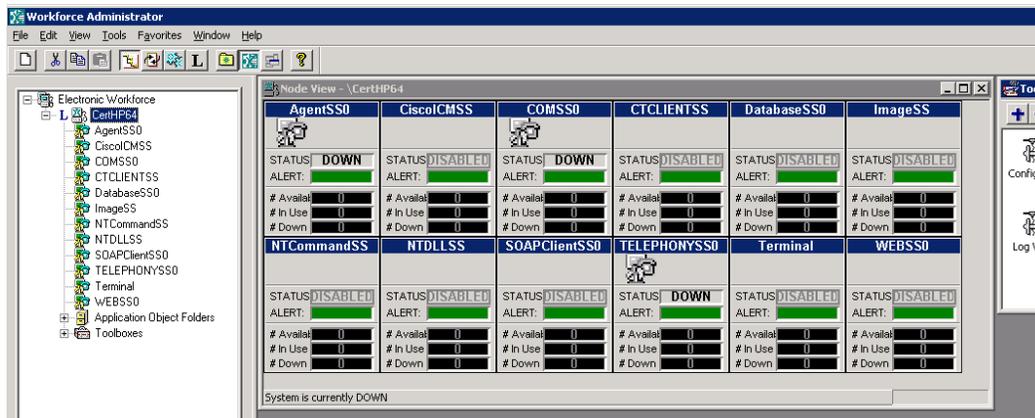
C:\Windows\system32>

```

- If your Electronic Workforce service was previously set to Automatic or Automatic (Delayed), you can now adjust the service back to its previous setting.

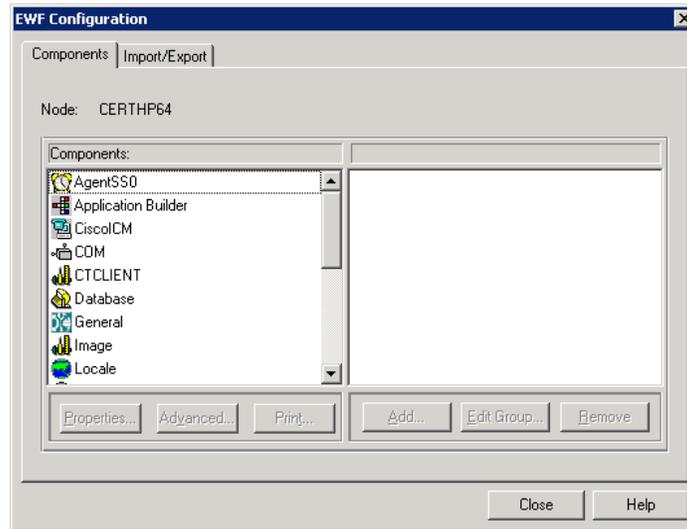
## Configuring Edify

Once Edify is installed and patched, log on as iviAdmin. Right click the Workforce Administrator icon and choose Run as administrator. It will look similar to the screen shot below.

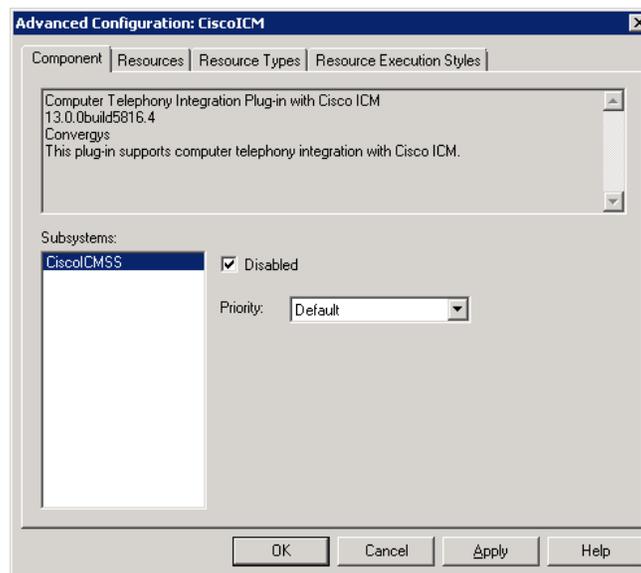


Open the various windows you need to view configuration and system information. Generally, these are the “Node View,” the System Toolbox, and the Application Object Folder. (The “Node View” is the window displaying the status of the EVIP subsystems, and it can be launched by double-clicking the server name, just under “Electronic Workforce” in the system “tree.”)

From the System Toolbox, open the Workforce Configuration Editor or click *Start | Programs | Edify | Administration | Configuration Editor*.



To disable a subsystem, click that component, and then click the **Advanced** button. Check the box labeled “Disabled,” and click **OK**.



Disable all subsystems **except** the following (some subsystems listed below may not be present on your server):

- AgentSSO
- Application Builder
- COM
- General
- Locale
- Scheduler
- Subman

- Supervisor
- Telephony

Select the **General** subsystem and click the **Properties** button. Enter all pertinent information. General settings include the EWF Serial Number, which can be copied and pasted from the Edify Copyright screen when you click *Help / About* in the Workforce Administrator. Click **OK** when finished.

The 'General Configuration' dialog box includes the following fields and controls:

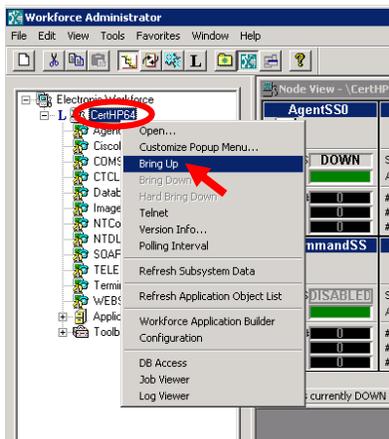
- Serial Number: [Text Field]
- Company Name: [Text Field]
- Site Address: [Text Field]
- Contact Name: [Text Field]
- Contact Numbers: [Text Field] (Phone) [Text Field] (Fax)
- Local Service: [Text Field]
- Service Numbers: [Text Field]
- Service Modem: [Text Field]
- Buttons: OK, Cancel, Help

Select the **Locale** subsystem and click the **Properties** button. Change the Area Code in the Locale subsystem. All other settings should be left to their defaults. Click **OK**.

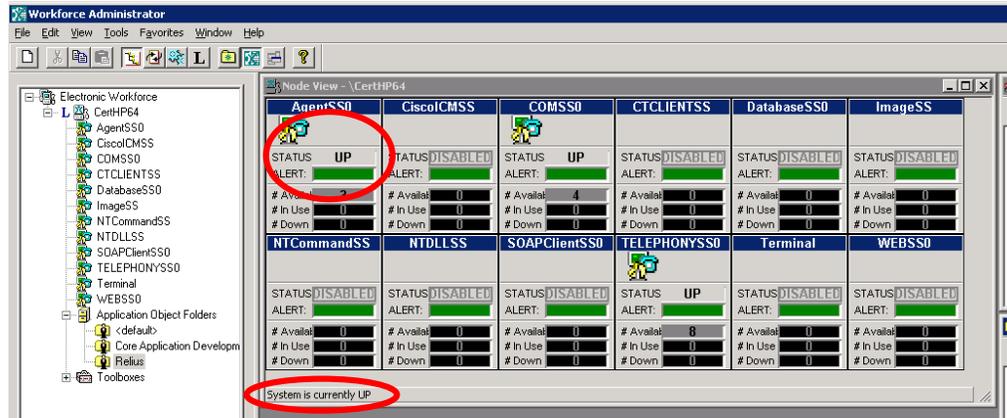
The 'Locale Configuration' dialog box includes the following fields and controls:

- Area Code: [Text Field] (904)
- Country Code: [Dropdown Menu] (United States - 1)
- Locale Name: [Text Field] (United States)
- Language: [Dropdown Menu] (English\_United States)
- Year Format: [Dropdown Menu] (4 digit year {YYYY})
- Time Format: [Dropdown Menu] (12 hour time {h})
- Null sort order: [Dropdown Menu] (Largest)
- Buttons: OK, Cancel, Help

Right click the “**node name**” (example shown below) and choose “**Bring up.**” Depending on the speed of your server and the configuration of your telephony system, it will take up to five minutes to be “up.”



Once the status bar says that the system is “up,” and there are no yellow flags or red fireworks on the “node view,” the system is ready for the Relius Administration installs.



## Relius Admin VRU setup

### Install RA20.0 Component DVD

Install the Relius Admin 20.0 Component DVD according to the usual instructions. If you use an earlier version of the Component installation, it may fail or install additional (and very unnecessary) components.

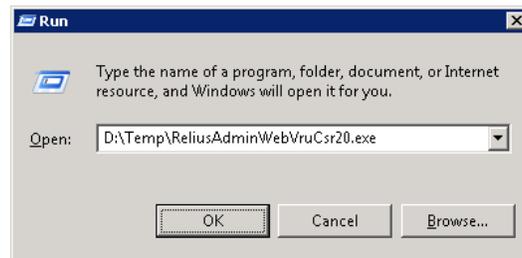
### Install Relius Administration VRU

A special installation has been created to set up your VRU on Relius Administration. Download ReliusAdminWebVruCSR20.exe from the Relius.net support site. Follow the instructions as you would from a new VRU installation.

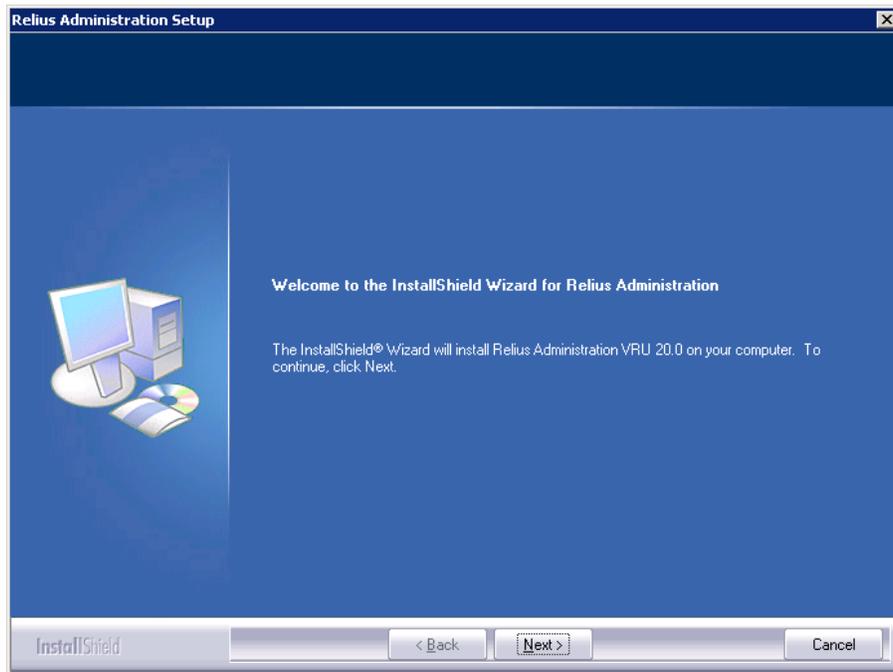
**Note: This installation is designed for systems running Relius Administration 20.0. Do not proceed unless your database and workstations are at this version.**

Before beginning make certain you are logged on as the “Edify User” designated earlier (iviAdmin) and that the Edify System is “up.”

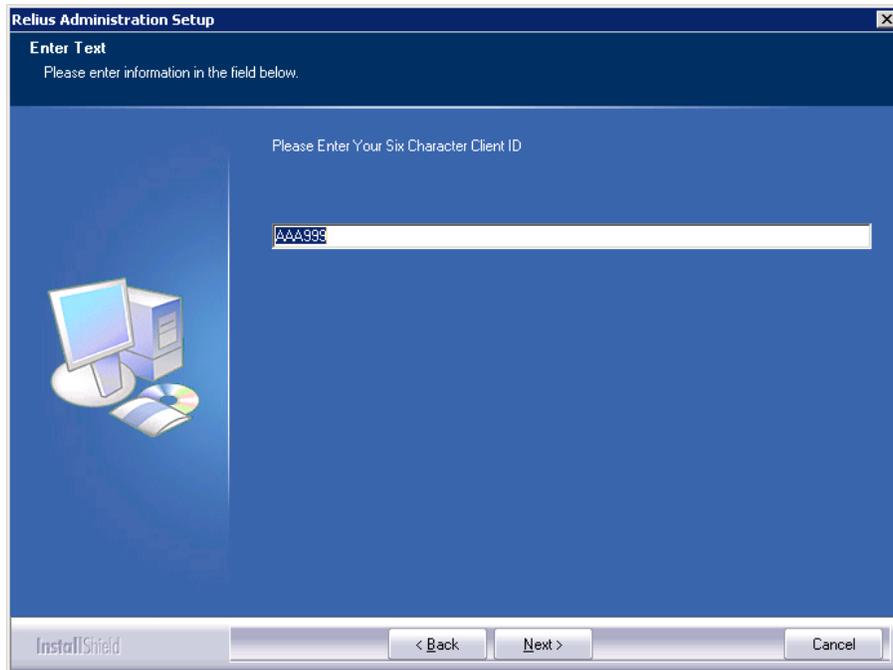
Download **ReliusAdminWebVruCSR20.exe** from the Relius.net support site. For purposes of this document, *D:\Temp* will be used. Click *Start / Run*, enter *D:\Temp\ReliusAdminWebVruCSR20.exe*, and click **OK**.



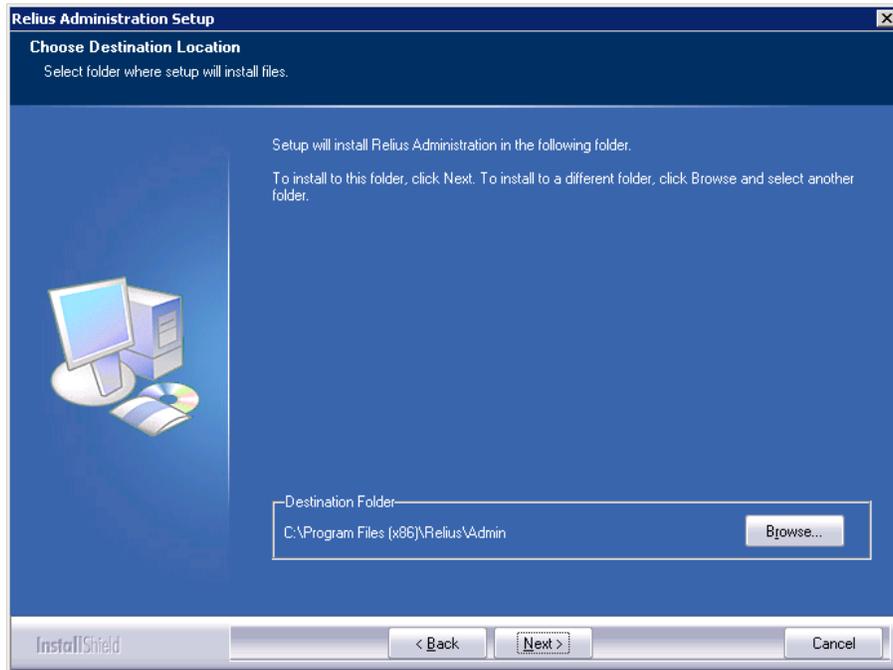
At the “Welcome” screen, click **Next**.



Enter your Client ID and click **Next**.



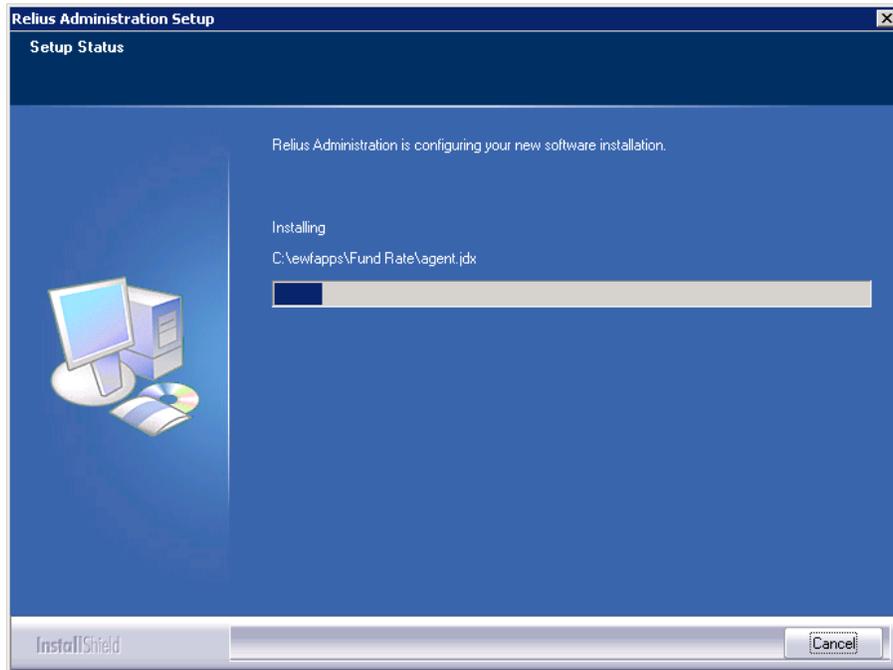
Confirm the location of your program files and click **Next**. SunGard Relius recommends that the location be left at the default, *C:\Program Files (x86)\Relius\Admin*.



If any previous “jobs” were present, they will be uninstalled.



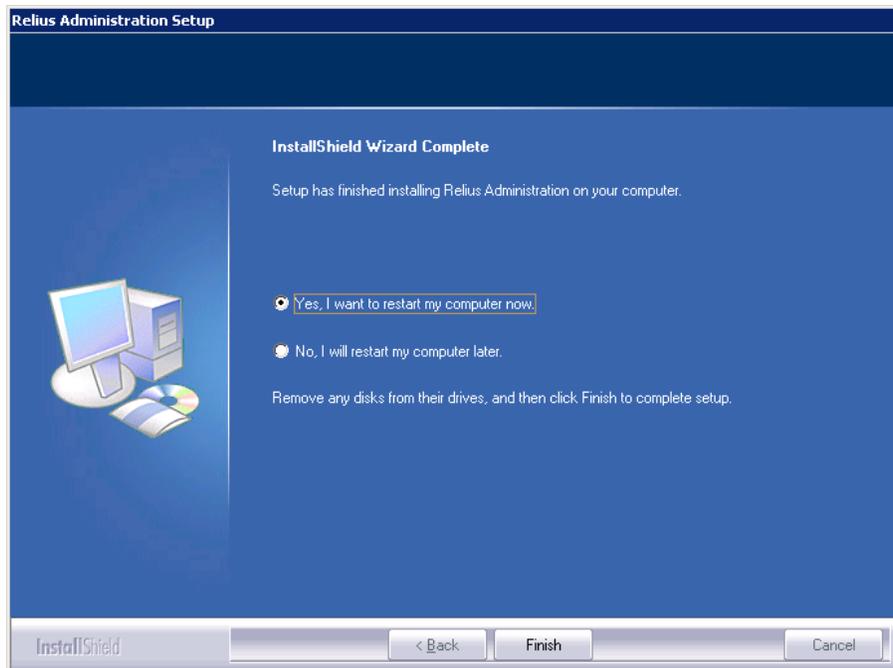
Application Objects (previously known as “jobs”), program files, and default voice clips will be copied to their appropriate locations.



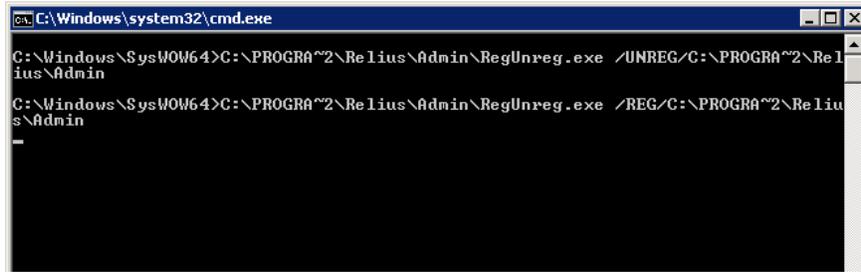
The application objects will be configured and installed.



When finished, be sure “Yes, I want to restart my computer now.” is checked and click **Finish**.



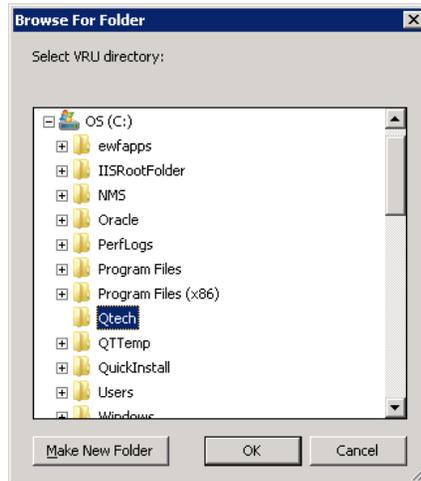
After restarting and logging back on, the system will take a few extra minutes to register program files. This is necessary. Do not interrupt.



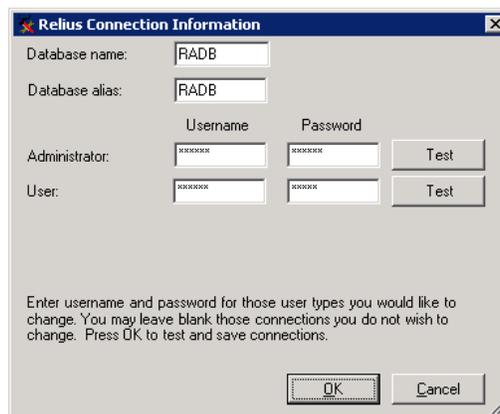
When finished, open the Edify Workforce Administrator and bring the system “up.”

### Configure Relius Administration VRU

Click *Start | Programs | Relius | Admin | VRU Configuration*. For a first-time setup, you will be prompted for the location of your voice clips. The default is `C:\Qtech`. Choose your location and click **OK**.



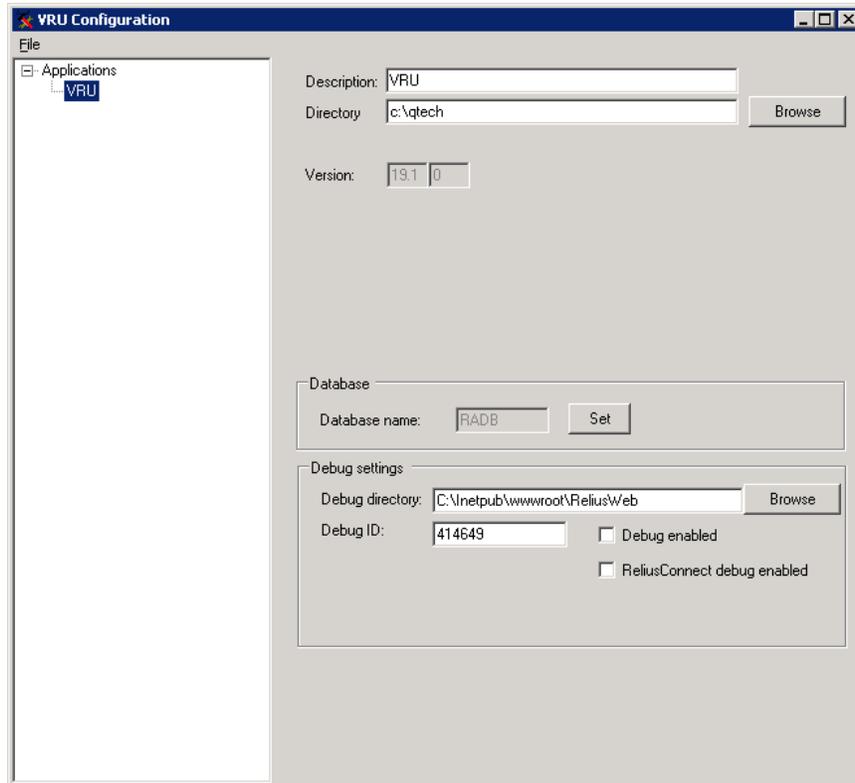
You will then be prompted for your database connection information. Enter your appropriate database strings. The “Administrator” user is normally **SYSDM**, while the “User” is normally **PNGWIN**. If your passwords for the databases are different than the default, please contact your database administrator.



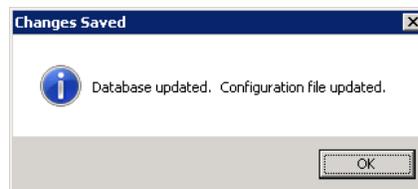
After entering the credentials for each user, you will need to click the **“Test”** button. When you have received a successful connection for both users, you can click **OK**.



The VRU Configuration screen will appear. To make your information visible, click *File | Reload*.



Save your changes by clicking *File | Save*.



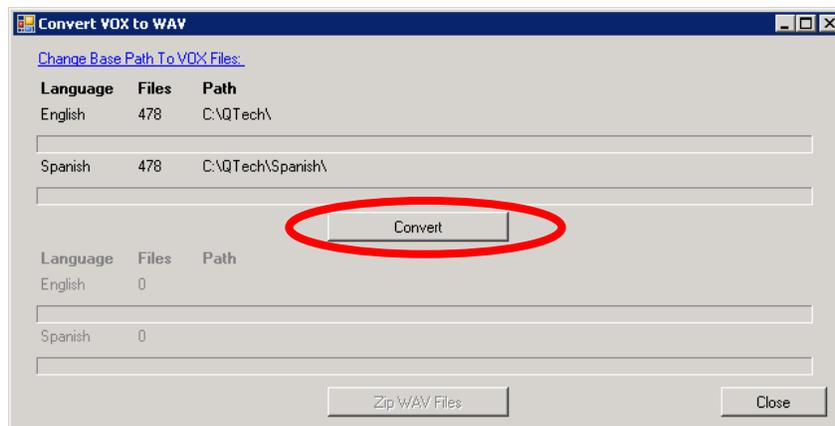
Exit VRU Configuration.

## Copy voice clips

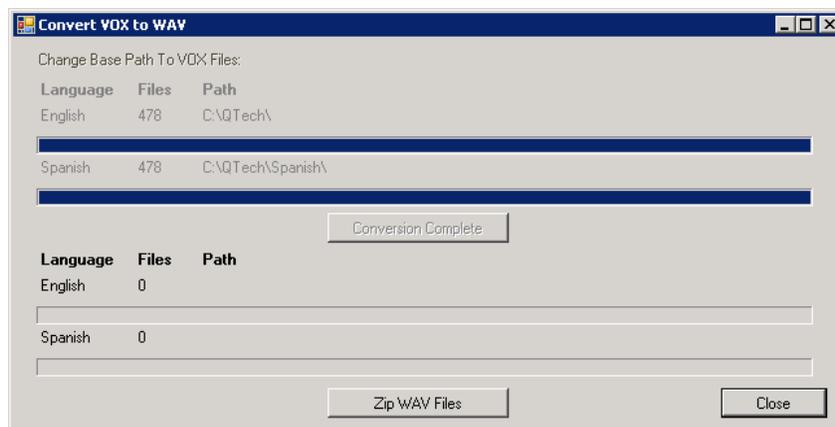
Run the utility (*C:\Program Files (x86)\Relius\Admin\VOX Conversion Utility.exe*) to convert the voice files from VOX to WAV format. Note: If you are using VOIP instead of a physical voice card, do not copy the voice files until **after** you have converted them.

Physical card	VOIP
Copy QTECH folder to new server	Copy <b>VOX Conversion Utility.exe</b> and <b>ICSharCode.SharZipLib.dll</b> to old server ( <i>C:\Program Files\Relius\Admin\</i> )
Run Conversion Utility	Run Conversion Utility
Click Convert	Click Convert
Click Close	Click "Zip WAV Files"
	Click Close
	Copy the Zip file to new server
	Extract the contents of the Zip file to <i>C:\QTECH</i>

If the path of your voice clips is different, click the blue link, "**Change Base Path To VOX Files**" and choose the correct location. When ready, click the "**Convert**" button in the middle of the screen.



The button will turn grey when the voice files are converted. Click **Close**.

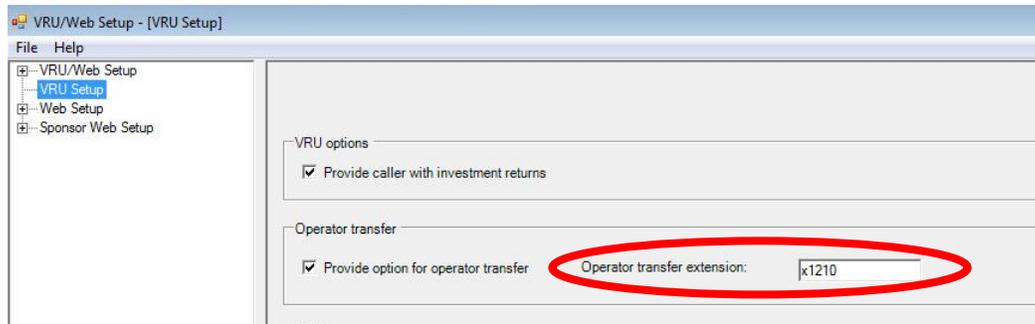


Call your VRU and log in as a participant to test the installation.

## Setting up Operator Transfer

For each plan that accesses the VRU, you will need to adjust the parameters for Operator Transfer. At a workstation, open a plan in Relius Administration, then click *Data Entry | VRU/Web Setup | Single Plan Setup*. At the VRU/Web setup window, click *VRU Setup* in the left-side pane.

Rather than the traditional four-digit extension you see below, you'll need a special set of codes and numbers: `sip:<phone#>@<ip address>`. So if the phone number you want to transfer calls to is 1-800-555-1212 and the IP address of your VOIP network card is 111.111.111.222, you will enter `sip:18005551212@111.111.111.222` in the Operator transfer extension field.



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