



Cisco ICM (Intelligent Contact Management) Release 4.6.1 CTI OS Server Installation Checklist



Customer:		System:	System name
Deployment Engineer:		Date:	
Final QA:		Date:	

Platform Configuration	Installation Note	QA Note
Have minimum platform requirements from latest BOM been met? YES / NO (circle one)		
Platform Serial Number		
Platform Model & Model Number		
Number of Processors & Speed		
BIOS Version		
Compaq Only Latest SSD Version:		
Amount of RAM (Specify # and size of chips)		
Number of Logical Hard Drives		
Size of Hard Drive		
MS Windows 2000 Server (Standard Edition for up to 4 CPU/4GB RAM Systems)		
Install as a Stand-alone Server (Member Server)		
License Mode: Per Seat		
Win2K License Product Number:		
Win2K Service Pack Version:	Currently SP2	
Set Boot partition to Full Disk Space on Drive C:		
MS Internet Explorer		
Internet Explorer Version:	Loaded with Win2K now Upgrade to 5.5	
Cisco ICM		
ICM (R4.6.1SPxHFx) Version:	ICM Release 4.6.1 required for Win2K	
pcAnywhere		
pcAnywhere Version:	Must be 9.2.1 – 10.5	

*NOTE 1: You must install the software in the order it is listed on this page.

Loading Windows 2000 Software		
<p>Load Server 2000 CD</p> <p>Standard CallRouter Drive Partition/Map: Drive C: - Mirrored (RAID 1) for OS/Apps/Logs</p> <p>Create partition in unpartitioned space Format using NTFS Boot partition to All Available Disk Space on C: (Mirrored) Licensing modes – per seat Set name and password Set Date and time settings</p> <p>Virtual Memory Setting: If platform has less than 2GB Physical RAM – set it to 1.5 x physical RAM size for machine</p> <p>If platform has 2GB or greater of Physical RAM – set it to 2GB and review Microsoft’s Tech Net/Knowledge Base article: Q237740</p> <p>Setup wizard prompts Windows 2000 Components Select Mgmt. Monitoring Tools -Details -Check Network Monitor Tools, uncheck others</p> <p>System Installs network components Choose custom and specify Private and Visible IP addresses</p> <p>Disable File and Print Sharing and Client for Microsoft Networks for Private and Signal Access Network cards – enable only on Visible Network</p> <p>Under File and Print Sharing Properties: -Select maximize data throughput for network applications</p> <p>DNS settings in “ My Network Places” Select local area connection for visible addresses <ul style="list-style-type: none"> - Internet protocol - Properties - Advanced - DNS tab Enter fully qualified domain name under “DNS suffix for this connection” Check Register this connections address in DNS</p>		

<p>For private addresses go into advanced setting as stated above Select DNS tab, UNCHECK register this connections address in DNS</p> <p>Check Client for Microsoft Networks Check Internet protocol Reboot</p> <p>Install Windows Service Pack SP2 Select update</p> <p>Configuring your server Windows 2000 initializes and displays the “Configuring your Server Utility”. You can use this utility or invoke separately. Active Directory is installed only on the Logger machines.</p>		
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Basic Customization of Platform		
<p>Select Computer Management Select storage Select Disk Management All Drivers are formatted with NTFS (do not use Volume Sets) The CD-ROM is Drive Z: All drives have been given Public Shares (C as CC, D as DD, CD-ROM as CD) with Full Control to Everyone Highlight drive, right-click properties Select sharing tab New share</p>	<p>Note: Customers may opt to lock down the public shares on the systems.</p>	

<p>Delete Extraneous Shortcuts on the Desktop Create Shortcuts on Desktop: Command Prompt %windir%\System32\cmd.exe Hosts %windir%\System32\notepad.exe %windir%\System32\notepad.exe Notepad %windir%\System32\notepad.exe Registry Editor %windir%\System32\regedt32.exe Copy the Hosts file to: %windir%\system32\drivers\etc</p>		
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<p>Configure Dr. Watson: At a DOS prompt, type “DRWTSN32” Log file: %windir% Crash Dump: %windir%\user.dmp Number of Instructions: 10 Errors to Save: 10 Only check: “Dump all Context Threads”, “Append to Existing Log File”, and “Create Crash Dump File”</p>		
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<p>Configure options for open Windows (folders): Open My Computer Click Tools Click Folder Options For the Browse Folders option, click the Open each folder in the same window View tab Display compressed files and folders with alternate color Display full path in title bar Uncheck hide file extensions for known file types Set all folders to these properties</p>		
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<p>Configure the Command Prompt: Open window by typing start Run CMD Right-click on top border Select defaults Layout Tab: Screen Buffer width = 200 Height = 9999 On the Font Tab: Size = 7 x 12 Apply properties to shortcut</p>		
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<p>Configure Windows Explorer: Open Windows Explorer, click on Tools, then Folder Options Click on View Check: “Display the full path in the title bar” “Display compressed files and folders with Alternate Color” Show hidden files and folders Uncheck “Hide file extensions for known file types”</p>		
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<p>Configure Event Viewer: Start – Programs Administrative Tools Computer Management Double-click event viewer Highlight each event type Example: highlight Application Right-click properties Set log to 1024 KB Overwrite as needed Repeat steps for other settings System, Security, Directory Service, DNS Service and File Replication Service</p>		
<p>Configure the Display: Verify that there is no Screen Saver Selected Display is set for at least 1024 x 768 resolution, 65k colors and at least 60 MHz</p>		
<p>Configure Date / Time Verify the clock is set correctly for that zone and date</p>		

<p>Configure System Properties:</p>		
<p>Right-click My computer Icon - select properties</p> <p>Startup and Recovery Set Display list of Operating Systems to 3 Sec. Set Write an event to system log Send Administrative alert Automatically reboot Select name to write debugging info Performance Tab: Set Application Performance Boost to NONE System will prompt for reboot</p>		

<p>RRAS – Routing and Remote Access Service</p>		
<p>Assign Internal Modems to COM3 and External Modems to COM1</p>		
<p>Ensure Modem dip switches are set to Auto Answer (DS 5 on USR modems)</p>		

<p>Choose Routing and Remote access from the administrative Tools folder on the Programs menu</p> <p>Right-click the computer in the console tree and choose Configure and Enable Routing and Remote Access Wizard starts</p> <p>In Common Configurations dialog box</p> <p>Select Remote Access Server</p>		
Configure RRAS to Dial out using NetBEUI only		
Configure RRAS to Dial in using TCP/IP only		
Assign Administrator Dial-in permission in "Remote Access Admin"		
Verify that you can RRAS into another PC from this Logger		

Network Interface Cards / Integrated NIC Properties		
<p>Network card configuration settings</p> <p>Right-click My Network</p> <p>Highlight Connection and select Advanced from drop down list</p> <p>Select Link speed and check all cards are set to no autosense</p> <p>Set to either 10mbps or 100mbps</p> <p>Sharing is turned off on both Private and Visible settings</p> <p>Disable Network Monitor on Private Card</p>		
<p>Network Cards:</p> <p>Card 1 – Port 1 Speed/Setting (10MB or 100MB)</p> <p> Duplex Setting (HALF or FULL)</p> <p> Port Enabled or Disabled</p>		
<p>Card 1 – Port 2 Speed/Setting (10MB or 100MB)</p> <p> Duplex Setting (HALF or FULL)</p> <p> Port Enabled or Disabled</p>		
<p>Card 2 – Port 1 Speed/Setting (10MB or 100MB)</p> <p> Duplex Setting (HALF or FULL)</p> <p> Port Enabled or Disabled</p>		
<p>Card 2 – Port 2 Speed/Setting (10MB or 100MB)</p> <p> Duplex Setting (HALF or FULL)</p> <p> Port Enabled or Disabled</p>		
Verify that "Network Monitor Tools and Agent Service" has been installed		
Ensure that TCP/IP and NetBEUI protocols are loaded		
Ping other machine(s) by Hostname		
Ping other machine(s) by IP address & host name		
Type HOSTNAME at the Command Prompt to verify system name		
Disable all Ethernet Cards/Ports not in use or defined in the Host File for Private, Visible or SAN		

<p>Verify Bindings are set up correctly: Select Network Dialup and Connections Select Advanced menu</p> <ul style="list-style-type: none"> - Advanced settings - Prioritize order of bindings <p>Set Private to enable ONLY TCP/IP Protocol Disable NetBEUI on all physical adapters</p>		
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Cisco CTI OS Software Load/Setup:		
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CTI OS Software Version :		
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<p>ODBC file Data Source Name Creation – Must be run before installing CTI OS</p> <p>Click on SQL Enterprise Administrator on Logger A Create a new login user – CTIOS Expand SQL server group Expand Machine Expand security Right-click logins Select New login</p> <p>Choose</p> <ul style="list-style-type: none"> - SQL Server Authentication - No password to allow CTIOS to open database without user interaction - Specify ICM database to connect (cust_SideA) <p>Allow it to access the ICM database with db_datareader access</p> <p>From PG or standalone server</p> <p>Start Programs Administrative Tools</p> <ul style="list-style-type: none"> - Data Sources “ ODBC Data Sources” <p>Select the File DSN tab Default directory is \$[Program Files]\CommonFiles\ODBC\Data Sources Directory Click ADD Select SQL server driver from the Driver List - see note 1 Name file ICMDB Click Finish Enter the name of Logger machine, click Next Select the SQL server authentication option and enter the login ID you created: “CTIOS” with no password Click the Change the default database to box</p>	<p>Note 1: You will need SQL drivers for this part of the install Please load the Microsoft Data Access Components From the Win2K Service Pack or Load SQL desktop selecting client connectivity components</p> <p>Note 2: If you encounter an error insure the machine CTIOS is loaded on is a member of the ICM domain</p>	
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<p>Select the ICM database from the drop down list Accept other defaults Click Next, accept all defaults Test connectivity to database - see note 2 Click Finish.</p>		
<p>Running CTI OS Setup CTI OS setup must be run from the CTI OS CD CTI OS will prompt for CTI Server and connection ports Use standard CTI Server names and ports Supply a logical name for PG Supply PG Peripheral ID Specify PG type (via pull-down list) Supply the ODBC file DSN that you created Identify if there are more that one CTI OS servers in use Finish</p>		

pcAnywhere Setup:		
<p>pcAnywhere Version 10.5 instructions Select Host only Select typical Configuration Instructions: Open pcAnywhere Click on “Add a host” Connections tab Select TCP/IP Settings tab - Launch with Windows - Run minimized - Run as a service Caller tab – new item Authentication – select Active Directory - properties Browse to ICM domain set Account to Administrators - privileges set to superuser - security options set to pcAnywhere encryption, check deny lower level encryption</p>	<p>pcAnywhere must be 9.2.1 – 10.5 for Windows 2000</p> <p>For security, the default setting is currently set to pcAnywhere encryption. This may be subject to change .</p>	

Services:		
Verify required services set for Auto Startup: Alerter MSSQLServer pcAnywhere Task Scheduler If modem attached to system: Routing and Remote Access Remote Access Connection Manager		
Set for Manual Startup:		
Network Monitor Tools and Agent Cisco ICM <cust_name> CTIOS		

Telnet Testing		
Windows now loads a native Telnet utility. Ataman Telnet client is no longer loaded on Win2K systems by ICM setup		
To allow for remote login please modify the following registry setting support NTLM authentication Open HKEY_Local_Machine\Software\Microsoft\Telnetserver\1.0 Set NTLM to 1 to use "NTLM if available otherwise a login prompt is presented" The default of 2 restricts to NTLM only		

Registry Editor Commands/Setup		
Configure the Registry Editor: Open Regedt32.exe Maximize the screen Maximize the HKEY_LOCAL_MACHINE window Uncheck Options/Auto Refresh Close Regedt32.exe Open Regedt32.exe Uncheck Options/Save Settings on Exit		
Version/License Verification		
Verify the Win2K License Number, User Name and Company in HKLM\software\microsoft\windowsnt\CurrentVersion		
Verify the SQL License Number in HKLM\software\microsoft\MSSQLServer\MSSQLServer\CurrentVersion		
*COMPAQ MACHINES ONLY Verify SSD Version in HKLM\software\compaq\cpqNTSSD\CurrentVersion		

Copy Software for Support

Copy Software to D:\Software: Compaq SSD's (NTSSD_x.xx) Win2K Server: Driver Directory (.drv) Win2K Server: I386 Directory Win2K Service Pack (SP2) ICM Software (Cisco\R4.6.1) Ethernet Drivers Video Drivers pcAnywhere, applicable updates SQL Server I386 Directory SQL Books Directory SQL Service Pack		
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Final System Checks

Create Emergency Repair Disk Start -Accessories -System tools -Backup -Tools menu Create Emergency repair disk		
Remove all Disks and CD's from the Drives		
Label machine on front and back, Repair Disk, and software boxes, with the Hostname		
Label each Network Card and Port – Visible, Private, SAN, Disabled		
Clear All Event Logs		
Clear any Dr. Watson Application Errors		
If temporary IP's were used, replace them with the Customer supplied IP's		
If temporary Hosts files were used, replace them with the Customer supplied Host files		
Include a copy of the Checklist		

Prepare for Shipping:

Include Windows 2000 Server		
Include pcAnywhere		
Include a copy of the Checklist		
Include 2 – RJ-45 Cables (Blue=Visible, Yellow=Private)		

Installation Reference Documents:

Cisco ICM Software Installation Guide

<http://www.cisco.com/univercd/cc/td/doc/product/icm/install/index.htm>

Cisco ICM System Manager Guide Supplements for given PG type

Cisco ICM Software ACD Supplements

<http://www.cisco.com/univercd/cc/td/doc/product/icm/index.htm>