



Installation Guide for Cisco Unified Expert Advisor

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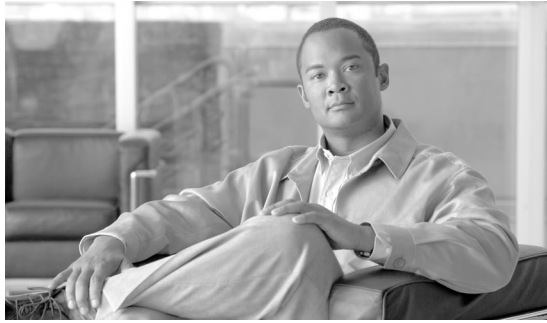
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Preface

Purpose

This guide explains how to install the Cisco Unified Expert Advisor.

Cisco Unified Expert Advisor is an optional feature for Cisco Unified Contact Center. It extends the contact center to allow an *expert advisor* to handle certain incoming calls. An expert advisor is a specialist who is not employed by the contact center—but who agrees to be 'on call' to provide services as a consultant.

Expert advisors establish their presence and availability to take a call by the state of their Instant Messaging (IM) Client—for example: *Available* or *Away*. The IM Client effectively serves as the "agent desktop" for experts, who establish their willingness to take a call by responding to a message (for example, *Are you available to handle this contact?*).

When the expert advisor confirms availability, the call can be:

- Routed directly to the expert by a self-service application.
- Transferred to the expert by the contact center agent who initially handled the call.
- Conferenced by the contact center agent so that the expert joins the call.

Note: This document might not represent the latest Cisco product information available. You can obtain the most current documentation by accessing Cisco's product documentation page at this URL: <http://www.cisco.com/web/psa/products/index.html>.

Audience

This guide is prepared for partners, specialists, and super users (system administrators) who might be responsible for the initial DVD installation of the Cisco Unified Expert Advisor.

Organization

In addition to this preface, this guide is arranged as follows:

This Chapter	Covers
Chapter 1, Performing Pre-Installation Tasks (page 5)	Overview of the hardware, the environment, and the platform Configuration worksheet for gathering information needed for the installation How to access and use the Answer File Generator
Chapter 2, Installing Cisco Unified Expert Advisor (page 11)	Time requirements and the sequence of the installation Installation Procedures
Chapter 3, After the Installation (page 27)	Worksheet for the Guided Initial Configuration Wizard Where to find information on actions to take after the installation
Appendix A: Frequently Asked Questions about the Installation (page 29)	Tips and answers

Related Documentation

You can find this information	In this document
Server requirements	Hardware and System Software Specification (Bill of Materials) ¹
7.x Solution Reference Network Design	SRND ²
Cisco Unified Expert Advisor documentation	http://www.cisco.com/go/ea
Cisco Unified Operations Manager documentation	Cisco Unified Operations Manager ⁴

1) http://www.cisco.com/en/US/products/sw/custcosw/ps1001/products_user_guide_list.html

2) http://www.cisco.com/en/US/products/sw/custcosw/ps1844/products_implementation_design_guides_list.html

4) http://www.cisco.com/en/US/products/ps6535/tsd_products_support_general_information.html

Conventions

This manual uses the following conventions:

Convention	Description
boldface font	<p>Boldface font is used to indicate commands, such as user entries, keys, buttons, and folder and submenu names. For example:</p> <ul style="list-style-type: none"> • Choose Edit > Find. • Click Finish.
<i>italic font</i>	<p>Italic font is used to indicate the following:</p> <ul style="list-style-type: none"> • To introduce a new term. Example: A <i>skill group</i> is a collection of agents who share similar skills. • For emphasis. Example: <i>Do not</i> use the numerical naming convention. • A syntax value that the user must replace. Example: IF (<i>condition, true-value, false-value</i>) • A book title. Example: See the <i>Cisco CRS Installation Guide</i>.
window font	<p>Window font, such as Courier, is used for the following:</p> <ul style="list-style-type: none"> • Text as it appears in code or that the window displays. Example: <code><html><title>Cisco Systems, Inc. </title></html></code>
< >	<p>Angle brackets are used to indicate the following:</p> <ul style="list-style-type: none"> • For arguments where the context does not allow italic, such as ASCII output. • A character string that the user enters but that does not appear on the window such as a password.

Obtaining Documentation and Submitting a Service Request

For information on obtaining documentation, submitting a service request, and gathering additional information, see the monthly *What's New in Cisco Product Documentation*, which also lists all new and revised Cisco technical documentation, at:

<http://www.cisco.com/en/US/docs/general/whatsnew/whatsnew.html>

Subscribe to the *What's New in Cisco Product Documentation* as a Really Simple Syndication (RSS) feed and set content to be delivered directly to your desktop using a reader application. The RSS feeds are a free service and Cisco currently supports RSS version 2.0.

Documentation Feedback

You can provide comments about this document by sending email to the following address:

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We appreciate your comments.



Chapter 1

Performing Pre-Installation Tasks

This chapter contains the following topics:

- [Planning for the Cisco Unified Expert Advisor Installation, page 5](#)
- [Important Considerations, page 6](#)
- [Adding and Installing the Cisco Unified Presence Server, page 7](#)
- [Completing the Configuration Worksheet, page 7](#)
- [Using the Cisco Unified Communications Answer File Generator, page 9](#)

Planning for the Cisco Unified Expert Advisor Installation

The Cisco Unified Expert Advisor is added to the Cisco Unified Contact Center environment as a ¹ cluster, comprised of:

- The primary runtime server. Required in all deployments of Cisco Unified Expert Advisor.
- The high availability runtime server. The high availability runtime server provides fault tolerance to the system and provides runtime capabilities if the primary runtime server goes down. The high availability runtime server is optional. The primary and high availability runtime servers cannot be split across a WAN.
- The reporting server. This server is not duplexed, and it is optional—install it if you intend to capture and report on Cisco Unified Expert Advisor historical reporting data. See the [FAQ \(page 36\)](#) for a brief explanation of the advantage of deploying the reporting server.

Cisco Unified Expert Advisor is an appliance application similar to Cisco Unified Communications Manager. It must be installed on dedicated servers, which must be Multimedia Communications Servers (MCS) or equivalent hardware only.

1) The terms node and server are used interchangeably in this document.

Important Considerations

Refer to the [Hardware and System Software Specification \(Bill of Materials\)](http://www.cisco.com/en/US/products/sw/custcosw/ps1001/products_user_guide_list.html) (http://www.cisco.com/en/US/products/sw/custcosw/ps1001/products_user_guide_list.html) for server requirements and version compatibility with Cisco Unified ICM/CCE, Unified Communications Manager, Unified Presence server, and Unified CVP.

The primary runtime server and the high availability runtime server each connect with Unified ICM with a dedicated Enterprise Gateway Peripheral Gateways (PG).

Important Considerations

Before you proceed with the installation, note these requirements and recommendations:

- Follow this installation sequence:
 - Install the primary runtime server first.
 - When the primary runtime server installation is complete, and *before installing* the high availability runtime server and the reporting server, log on to the Cisco Unified Expert Advisor operations console [to configure the high availability runtime and the reporting servers \(page 31\)](#).

Note: All configured nodes in a cluster must be up and running before you install a new node to that cluster. For example, if the primary runtime server and the high availability runtime server have been installed and you are about to add a reporting server to the cluster, both runtime servers must be up and running so that reporting server is able to access them during the reporting server installation.

- Be aware that installation on an existing (repurposed) server formats the hard drive and erases all data. It might also change the system Basic Input Output System (BIOS), firmware, and Redundant Array of Inexpensive Disks (RAID) configuration.
- Install the software during off-peak hours or a maintenance window to avoid impact from interruptions.
- Be aware that many values that you enter on the configuration wizard screens—such as host names, user names, and passwords—are case-sensitive.
- On the configuration wizard screens, enter the same security password on all servers in the cluster. Keep a record of this password; you will need to provide this password if you replace or add a server in the future.
- On the configuration wizard screens, use the default Maximum Transmission Unit (MTU) setting for all servers in the cluster.

Adding and Installing the Cisco Unified Presence Server

Cisco Unified Expert Advisor is not a standalone application. The Cisco Unified Expert Advisor cluster of servers and the two Enterprise Gateway PGs are necessary but not sufficient for taking advantage of expert advisor functionality.

Before you can configure Cisco Unified Expert Advisor, you must:

- Add Cisco Unified Presence server as an Application Server in Unified Communications Manager.
- Install a Cisco Unified Presence server to import expert advisors and to support the Instant Messaging/Chat client and Session Initiation Protocol (SIP) routing.

You can find the Cisco Unified Presence server Installation Guide in [Cisco's online documentation repository](http://www.cisco.com/en/US/products/ps6837/prod_installation_guides_list.html). (http://www.cisco.com/en/US/products/ps6837/prod_installation_guides_list.html)

Completing the Configuration Worksheet

Use this worksheet to record network and password information that both the [Answer File Generator \(page 9\)](#) and the basic installation configuration wizard prompt you to enter. Store this worksheet information for future reference.

Table 1: Configuration Worksheet

Configuration Data	Your Entry
Host Name	Primary Runtime Server: _____ High Availability Runtime Server: _____ Reporting Server: _____
IP Address	Primary Runtime Server: _____ High Availability Runtime Server: _____ Reporting Server: _____
IP Mask	Primary Runtime Server: _____ High Availability Runtime Server: _____ Reporting Server: _____
GW Address	Primary Runtime Server: _____ High Availability Runtime Server: _____

Completing the Configuration Worksheet

Configuration Data	Your Entry
	Reporting Server: _____
Primary DNS IP Address See " Why do I receive a Network Error for the DNS Server? (page 37) "	Primary Runtime Server: _____ High Availability Runtime Server: _____ Reporting Server: _____
Secondary DNS IP Address	Primary Runtime Server: _____ High Availability Runtime Server: _____ Reporting Server: _____
Administrator Username See the FAQ on User Roles (page 34) .	Primary Runtime Server: _____ High Availability Runtime Server: _____ Reporting Server: _____
Administrator Password	Primary Runtime Server: _____ High Availability Runtime Server: _____ Reporting Server: _____
Timezone	Primary Runtime Server: _____ High Availability Runtime Server: _____ Reporting Server: _____
Certificate Information	Organization: _____ Unit: _____ Location: _____ State: _____ Country: _____
NTP Server Host Name or IP Address	NTP Server 1: _____ NTP Server 2: _____ NTP Server 3: _____ NTP Server 4: _____ NTP Server 5: _____
Database Access Security Password	Security Password: _____

Configuration Data	Your Entry
Servers in the cluster use the security password to communicate with one another. You must enter the same security password for all servers in the cluster.	
Simple Mail Transfer Protocol (SMTP) Location Host Name	SMTP Host Name or IP address: _____
Application User Credentials See the FAQ on User Roles (page 34) .	Application User Name: _____ Application User Password: _____
Cisco Unified Presence server (These are required fields for configuring the high availability runtime server.)	Primary Cisco Unified Presence server host address: _____ Fully qualified domain name: _____ Cisco Unified Presence server user: _____

Using the Cisco Unified Communications Answer File Generator

The installation offers you the option to complete configuration wizard screens at each server—or—to enter configuration data *once* in an online utility for download and use on all servers in the cluster.

The Cisco Unified Communications Answer File Generator is the online utility that collects basic configuration data and saves that configuration in xml format on a USB key.

-
- Step 1** From a computer with an Internet browser, access the Cisco Answer File Generator at <http://crs-server/afg/>.
- Step 2** Select **Cisco Unified Expert Advisor** from the Product to be Installed drop-down.
- Step 3** Complete the online web form. There is online help for each field on the form.

It might be helpful to refer to the [configuration worksheet \(page 7\)](#) when you complete the online form.
- Step 4** When you have completed the form, click **Generate Answer Files**.

This opens a dialog box with instructions for downloading the Answer File.
- Step 5** Click **Download File** to open a standard Save File dialog box.
- Step 6** Navigate to the location where you want to save the file.
- Step 7** Copy the `platformConfig.xml` file to a USB key.
-

Completing the Configuration Worksheet

You may need to reformat the USB key to the FAT32 file system. See the [FAQ \(page 32\)](#) for the procedure to do this.



Chapter 2

Installing Cisco Unified Expert Advisor

The installation for Cisco Unified Expert Advisor is delivered on DVD media.

Run the DVD installation of the Cisco Unified Expert Advisor application on each server in the cluster—on the primary runtime server, on the high availability runtime server, and on the reporting server. Use the same DVD for all installations.

A patch upgrade may be required during the Release 7.6(1) installation.

This chapter contains the following topics:

- [Installation Sequence and Time, page 11](#)
- [Navigating the Installation Wizard, page 12](#)
- [Pre-Install Media and Hardware Check, page 12](#)
- [Starting the Software Installation, page 14](#)
- [Applying the Upgrade Patch, page 15](#)
- [Entering Configuration Information, page 18](#)
- [Completing the Configuration for the First Node, page 21](#)
- [Completing the Configuration for the High Availability and Reporting Servers, page 24](#)

Installation Sequence and Time

A Cisco Unified Expert Advisor cluster includes three servers: two runtime servers (primary runtime and high availability runtime) and one reporting server.

You must install and then apply the upgrade patch on the primary runtime server first.

It makes no difference which server is installed and upgraded next—the high availability runtime server or the reporting server.

The installation of the primary runtime and the high availability runtime servers can take 60 to 90 minutes to complete. The installation of the reporting server can take from two to three hours.

Navigating the Installation Wizard

Installing Cisco Unified Expert Advisor is a phased installation. The installation phases are:

- [The Pre-Install Media and Hardware Check \(page 12\)](#) (all nodes)
- [Starting the Software Installation \(page 14\)](#) (all nodes)
- [Applying the Upgrade Patch \(page 15\)](#) (all nodes, if required)
- [Entering Configuration Information \(page 18\)](#)
- [Completing Configuration of the First Node \(page 21\)](#) (the primary runtime server)
- [Completing Configuration of Subsequent Nodes \(page 24\)](#) (the high availability runtime and the reporting servers)

Navigating the Installation Wizard

Much of the installation requires no action on the part of the person who runs it. When user input *is* required, such as on the installation's configuration wizard screens, use the following *keyboard* navigation and selection actions.

Note: The installation wizard screens do not recognize a mouse or a touchpad.

Table 2: Installation Wizard Navigation

To Do This	Press This Key
Move to the next field	Tab
Move to the previous field	Alt-Tab
Choose an option	Spacebar
Scroll up or down a list	Up or Down arrow keys
Go to the previous screen	Tab to Back and press the Spacebar
Get information on a screen	Tab to Help and press the Spacebar
Scroll up and down a list	Up or Down arrow keys

Pre-Install Media and Hardware Check

Every installation begins with the pre-install media check (optional) and hardware check (mandatory).

-
- Step 1** Insert the installation DVD into the tray. Then restart or power on the server so that it boots from the DVD.

You see a long sequence of messages on the monitor, some of which prompt you to press a key. *Do not respond* to these prompts.

When the pre-install scripts end, the DVD Found screen opens.

- Step 2** In the **DVD Found** screen, you have the option to perform a media check to validate the integrity of the DVD.

If	Then
You want to check the media.	<p>Select Yes to begin the media check.</p> <p>The media check can take a long time. If the media check for the primary runtime server installation passes, you might chose not to recheck the media when you install the subsequent nodes.</p> <ul style="list-style-type: none"> • If the media check passes, select OK in the Media Check Result screen to initiate the hardware check. • If the media check fails, the DVD is ejected and the installation terminates. Contact your support provider for assistance.
You want to skip the media check.	<p>Select No.</p> <p>A <i>Please Wait</i> message is displayed, and then the hardware check begins.</p> <p>Note: If you are not installing on IBM servers, you see messages similar to this at the bottom of the screen:<i>rmmmod: ohci_hcd: No such file or directory</i>. These messages are followed by a long pause and are safe to ignore. See the FAQ (page 30) for details.</p> <p>Proceed to Step 3.</p>

- Step 3** The hardware check validates the server hardware and firmware on which you will be executing the installation. The hardware check is mandatory and begins automatically at the completion of a successful media check or if you skip the media check.

Hardware checks include:

- A **check for hard drive sanity**, during which the installation checks for a supported hardware platform with the correct number of disks.

If the server hardware is unsupported, a message is displayed indicating that the installation cannot proceed, and the installation halts. If you require assistance understanding the message, write it down to facilitate your conversation with your support provider.

Note: Refer to the [Hardware and System Software Specification \(Bill of Materials\)](http://www.cisco.com/en/US/products/sw/custcosw/ps1001/products_user_guide_list.html) (http://www.cisco.com/en/US/products/sw/custcosw/ps1001/products_user_guide_list.html) for details on supported hardware.

- A **BIOS** check, during which the BIOS is checked and updated (flashed) if necessary. An update results in a reboot.
- A **RAID** check. A RAID setup or configuration, if necessary, will initiate a reboot.

Note: If the installer makes any changes to your hardware configuration settings causing the server to reboot, *leave the DVD in the tray during the reboot.*

When the hardware check completes, the Product Deployment Selection screen is displayed.

Step 4 The **Product Deployment Selection** screen contains only one choice—**OK**.

Select **OK** to open the Proceed with Install screen.

Step 5 The **Proceed with Install** screen shows the version of Cisco Unified Expert Advisor on the hard drive (if any) and the version of Cisco Unified Expert Advisor on the DVD. For the initial installation of Cisco Unified Expert Advisor, the version on the hard drive shows NONE.

Select **Yes** at the Proceed with Install screen.

The Platform Installation Wizard screen opens.

Step 6 In the **Platform Installation Wizard** screen, select **Proceed**.

The Apply Patch screen opens.

Step 7 In the **Apply Patch** screen, select **Yes**. The [software installation \(page 14\)](#) starts immediately.

Starting the Software Installation

The installation of the primary runtime and the high availability runtime servers can take 60 to 90 minutes to complete. The installation of the reporting server can take from two to three hours.

Note: If a critical error occurs during installation, you are prompted to collect log files. To do this, insert a USB memory key in any available USB port and follow the instructions on the screen.

While the installation is in progress, no action is required on your part.

During the installation, the monitor shows a series of processes. You see:

- Formatting Progress Bars
- Copying File Progress Bar

- Platform Installation Progress Bars
- Post Install Progress Bar
- Application Installation Progress Bars
- A System Reboot

Messages appear during the reboot, some of which prompt you to press a key. Do not respond to these prompts to press a key.

Note: During the reboot, the CD tray holding the DVD ejects. This is normal. You do not need to close the tray.

- Application Pre Install Progress Bars

During the Application Pre Install process, the Install Upgrade Retrieval Mechanism screen opens.

Go to the section [Applying the Upgrade Patch from a Remote Server \(page 15\)](#).

Applying the Upgrade Patch

The Release 7.6(1) installation may include a mandatory upgrade patch. This upgrade is initiated by your selection of a retrieval method at the Install Upgrade Retrieval Mechanism Configuration screen. This screen displays during the installation.

The Install Upgrade Retrieval Mechanism Configuration screen presents options to:

- [Retrieve the upgrade file directly from a remote server, using FTP or SFTP. \(page 15\)](#)

If you are doing a fresh installation on the primary runtime server, select this option.

- [Copy the upgrade file from the remote server onto a CD or DVD and retrieve it locally \(page 17\)](#).

Select this option only if you have access to the Cisco Unified OS Administration server.

Applying the Upgrade Patch from a Remote Server

Follow this procedure if you selected **SFTP** or **FTP** and then **OK** at the **Install Upgrade Retrieval Mechanism Configuration** screen.

As a selection of SFTP or FTP requires that you configure network settings, this selection opens with the Auto Negotiation Configuration screen.

- Step 1** In the **Auto Negotiation Configuration** screen, select whether you want to use automatic negotiation for the settings of the Ethernet network interface card (NIC).

If	Then
The ethernet network interface card (NIC) attached to your hub or Ethernet switch supports automatic negotiation.	Select Yes . The MTU Configuration screen opens. Proceed to Step 3.
You want to disable auto-negotiation and specify NIC speed and duplex settings.	Select No . The NIC Speed and Duplex Configuration screen opens, allowing you to manually configure the settings. Proceed to Step 2.

- Step 2** In the **NIC Speed and Duplex Configuration** screen, configure settings as follows:

- a. Specify the speed of the Network Interface (NIC) card in megabits per second. Speed options are **10** or **100**.

Effective Unified Expert Advisor Release 7.6(1), full duplex setting of the NIC server is supported for the 10/100 megabit speed. With gigabit, auto-configuration is also supported.

- b. Select **OK**.

The MTU Configuration screen is displayed.

- Step 3** In the **MTU Configuration** screen, select **No** to keep the default setting (1500).

- Step 4** At the **Static Network Configuration** screen, enter static network configuration values as follows, referring to the [Configuration Worksheet \(page 7\)](#) if necessary:

- a. Enter the **Hostname**.
- b. Enter the **IP Address**.
- c. Enter the **IP Mask**.
- d. Enter the **GW Address**,
- e. Select **OK**.

A configuration and network setup script runs.

Then the Domain Name System (DNS) Client Configuration screen is displayed.

- Step 5** In the **DNS Client Configuration** screen, select **Yes** to enable DNS.

Note: See "[Why do I receive a Network Error for the DNS Server? \(page 37\)](#)"

The DNS Configuration screen is displayed.

Step 6 In the **DNS Client Configuration** screen, enter your DNS client information as follows, referring to the [Configuration Worksheet \(page 7\)](#) if necessary:

- a. Enter the **Primary DNS** (mandatory).
- b. Enter the **Secondary DNS** (optional).
- c. Enter the **Domain** (mandatory).
- d. Select **OK**.

A configuration and network setup script runs.

Then the Remote Patch Configuration screen displays.

Step 7 At the **Remote Patch Configuration** screen:

- a. Enter the Remote Server Name or IP Address.
- b. Enter the Patch Directory.
- c. Enter the Patch Name (optional).
- d. Enter the Remote Login ID.
- e. Enter and confirm the Remote Password.
- f. Select **OK**.

The Install Upgrade Patch Selection Validation screen displays.

Step 8 At the **Install Upgrade Patch Selection Validation** screen, select the patch and then select **Continue**.

The system installs the patch, then restarts the system running the upgraded software version.

After the system restarts, the Preexisting Configuration Information window displays.

Step 9 Continue to [Entering Pre-Existing Configuration \(page 18\)](#).

Applying the Upgrade Patch from a Local Disk

Follow this procedure if you intend to select **Local** and then **OK** at the **Install Upgrade Retrieval Mechanism Configuration** screen.

Before upgrading from a DVD, you must download the patch file.

Applying the Upgrade Patch

-
- Step 1** To download the patch file, log on to Cisco Unified OS Administration and select **Software Upgrades > Install/Upgrade**.
- Step 2** For Source, select **DVD/CD**.
- Step 3** Insert a DVD into the tray.
- Step 4** For Directory, Server Name User Name User Password SFTP defaults as the protocol
- Step 5** When the file has downloaded to the DVD, insert the DVD into the server where you are installing EA.
- Step 6** At the **Install Upgrade Patch Selection Validation** screen, select the patch from the DVD and then select **Continue**.

The system installs the patch, then restarts the system running the upgraded software version.

After the system restarts, the Preexisting Configuration Information window displays. Skip to [Entering Pre-existing Configuration Information \(page 18\)](#).

Entering Configuration Information

In the **Entering Pre-existing Information** screen, your options are to insert a USB key and then continue, or to continue without inserting the USB key.

- Step 1** In the **Entering Pre-existing Information** screen:

If	Then
If you used the Answer File Generator web application to generate and copy a platformConfig.xml to a USB key.	Insert the USB drive into the server. Select Continue and follow the prompts.
If you do not have a file on a USB key:	Select Continue to display the Apply Patch screen. Select No at the Apply Patch screen to display the Basic Install screen. You have already applied the patch Continue to Step 2.

- Step 2** In the **Basic Install** screen, select **Continue**.

The Basic Install screen launches the configuration wizard—a series of screens that present questions and options pertinent to the platform and the Cisco Unified Expert Advisor setup configuration. There is online help for each wizard screen.

Note: You can change many of the basic installation configuration settings after the installation using the Set commands in the CLI.

Note also that some or all of the Basic Install Configuration screens also open if you choose to enter [Pre-existing Configuration Information after the installation \(page 18\)](#) and if:

- You have no Answer File on a USB key.
- The information saved on the USB key is insufficient.

The first wizard screen (Timezone Configuration) is displayed.

Step 3 In the **Timezone Configuration** screen:

- a. Use the down arrow to select the local timezone that most closely matches where your server is located.
- b. Select **OK**.

Note: The timezone field is based on city/country and is mandatory. Setting it incorrectly can affect system operation.

The Auto Negotiation Configuration screen is displayed.

Step 4 In the **Auto Negotiation Configuration** screen, select whether or not you want to use automatic negotiation for the settings of the Ethernet network interface card (NIC).

If	Then
The ethernet network interface card (NIC) attached to your hub or Ethernet switch supports automatic negotiation.	Select Yes . The MTU Configuration screen opens. Proceed to Step 4.
You want to disable auto-negotiation and specify NIC speed and duplex settings.	Select No . The NIC Speed and Duplex Configuration screen opens, allowing you to manually configure the settings. Proceed to Step 5.

Step 5 In the **NIC Speed and Duplex Configuration** screen, configure settings as follows:

- a. Specify the speed of the Network Interface (NIC) card in megabits per second. Speed options are **10** or **100**.

Effective Unified Expert Advisor Release 7.6(1), only full duplex setting of the NIC server is supported for the 10/100 megabit speed. With gigabit, auto-configuration is also supported.

- b. Select **OK**.

The MTU Configuration screen is displayed.

Step 6 In the **MTU Configuration** screen, select **No** to keep the default setting (1500).

Step 7 At the **Static Network Configuration** screen, enter static network configuration values as follows, referring to the [Configuration Worksheet \(page 7\)](#) if necessary:

- a. Enter the **Hostname**.
- b. Enter the **IP Address**.
- c. Enter the **IP Mask**.
- d. Enter the **GW Address**,
- e. Select **OK**.

Scripts run. Then the Domain Name System (DNS) Client Configuration screen is displayed.

Step 8 In the **DNS Client Configuration** screen, select **Yes** to enable DNS.

The DNS Configuration screen is displayed.

Step 9 In the **DNS Client Configuration** screen, enter your DNS client information as follows, referring to the [Configuration Worksheet \(page 7\)](#) if necessary:

- a. Enter the **Primary DNS** (mandatory).
- b. Enter the **Secondary DNS** (optional).
- c. Enter the **Domain** (mandatory).
- d. Select **OK**.

Scripts run. Then the Administrator Login Configuration screen is displayed.

Step 10 In the **Administrator Login Configuration** screen:

- a. Enter the ID for the master administrator. See the [FAQ on Accounts and Passwords \(page 35\)](#) for the permissions and responsibilities of this administrator.
- b. Enter and then confirm the password for the administrator.
- c. Select **OK**.

The Certificate Information screen is displayed.

Step 11 In the **Certificate Information** screen:

- a. Enter data to create your Certificate Signing Request—Organization, Unit, Location, State, and Country.

Note: Use the down arrow key to locate the correct Country. Note also that the # sign to the right of the Country selection might not move to your selection. Ignore this anomaly of the interface.

b. Select **OK**.

The First Node screen is displayed.

Step 12 In the **First Node** screen, specify whether you are configuring the first node. (The "first node" is the primary runtime server.)

If	Then
You are installing and configuring the primary runtime server. Note: There is only one <i>first node</i> per cluster.	Select Yes . The Network Time Protocol Client Configuration screen opens. Continue to Step 1 in the section Completing the Configuration for the First Node (page 21) .
You are installing and configuring the high availability runtime server or the reporting server.	Select No . The First Node Configuration Warning screen opens. Continue to Step 1 in the section Completing the Configuration for Subsequent Nodes. (page 24)

Completing the Configuration for the First Node

When you complete the Basic Install Configuration, and select **First Node = Yes**, perform the following steps to complete the configuration for the primary runtime server.

Step 1 Complete the **Network Time Protocol Client Configuration** screen.

The first node (the primary runtime server) can get its time from any external Network Time Protocol server that you define—or—from a time that you set on the Hardware Clock screen.

Note: Network Time Protocol or Hardware Clock configuration are set for the first node only. Other nodes set their time to the time on the first node.

Cisco recommends configuring Network Time Protocol (NTP) to keep time accurate.

If	Then
You want to establish this server as the NTP server that will provide time updates to the high availability and runtime servers.	Select Yes . A second Network Time Protocol Client Configuration screen opens.

If	Then
	Proceed to Step 3.
You want to set the hardware clock.	Select No . The Hardware Clock Configuration screen opens. Proceed to Step 2.

Step 2 The **Hardware Clock Configuration** screen opens.

The hardware clock is a battery-backed clock that maintains the time while the machine is powered off. On startup, the operating software reads the hardware clock and uses it to set the time.

- a. Confirm that the date and the time that display are correct. (They are based on a 24-hour format for the timezone: **yyyy mm dd hh mm ss**.)
- b. Select **OK**.

The Database Access Security screen opens.

Proceed to Step 4.

Step 3 The **Network Time Protocol Client Configuration** screen opens.

You can add up to five NTP servers and make changes to the NTP server list at a later time.

Note: Cisco recommends that you use a minimum of three external NTP servers.

- a. Enter the IP address, NTP server name, or NTP Server Pool name for at least one external NTP server.
- b. Select **OK**.

The Database Security Information Configuration screen opens.

Step 4 In the **Database Security Information Configuration** screen:

- a. Enter the Database Access Security password. This is the password that servers in the cluster use to communicate with each another. You must enter the same security password for all servers.
- b. Select **OK**.

The SMTP Host Configuration screen opens.

Step 5 In the **SMTP Host Configuration** screen, select whether you want to configure an SMTP host for outbound email. This field is optional.

If	Then
You want to configure an SMTP Host.	Select Yes . The second SMTP screen opens. Proceed to Step 6.
You do not want to configure an SMTP Host.	Select No . The Application User Configuration screen opens. Proceed to Step 7.

Step 6 In the second **SMTP Host Configuration** screen, :

- a. Enter the hostname or IP address for the SMTP server.
- b. Select **OK**.

The Application User Configuration screen opens

Step 7 In the **Application User Configuration** screen, enter the user information for the application user, who becomes the default super user. See the [FAQ on Accounts and Passwords \(page 35\)](#) for the permissions and responsibilities of the application user.

- a. Enter the application username.
- b. Enter and confirm the application user password.
- c. Select **OK**.

The Platform Configuration Confirmation screen is displayed.

Step 8 In the **Platform Configuration Confirmation** screen, select **OK** to proceed with the installation.

The installation process continues.

An informational Production Licensing screen displays.

An informational Cryptographic Export Warning screen displays.

The installation ends at a login prompt.

Step 9 Log in to the Cisco Unified Expert Advisor operations console. See the [FAQ \(page 33\)](#).

Step 10 Click **Cancel** at the Initial Configuration Wizard screen.

Step 11 Open the System Management drawer.

Applying the Upgrade Patch

IF	THEN
You want to configure the High Availability Server.	Select Runtime Servers > Add High Availability . Enter the name and host address. Click Save .
You want to configure the Reporting Server.	Select Reporting Server > Add New . Enter the name and host address. Click Save .

Once these servers are configured in the Cisco Unified Expert Advisor operations console, repeat the DVD installation and patch upgrade for them.

Completing the Configuration for the High Availability and Reporting Servers

When you complete the Basic Install Configuration, and select **First Node = No**, perform the following steps to complete the configuration for the high availability server and the reporting server.

Note: All configured servers in a cluster must be up and running before you install a new server to that cluster. For example, if the primary runtime server and the high availability runtime server have been installed and you are about to add a reporting server to the cluster, both runtime servers must be up and running so that reporting server is able to access them during the reporting server installation.

Step 1 Complete the **First Node Configuration Warning** screen.

This screen advises you that you must access the Unified Expert Advisor operations console to add and configure subsequent nodes Cisco before you can proceed and can install those nodes.

If	Then
You have already added the name and host address for this node in the Cisco Unified Expert Advisor operations console.	Select OK . The Network Connectivity Configuration screen opens. Proceed to Step 2.
You have not yet configured the high availability runtime and the reporting servers in the online console.	Refer to the instructions in the FAQ: How Do I Configure the High Availability and Runtime Servers Before I Install Them? (page 31) You must configure the servers before continuing.

Step 2 In the **Network Connectivity Test Configuration** screen, you have the option to verify the connection of this node to the first node (the primary runtime server).

Note: This screen refers to the first node as the "publisher," in reference to its role in database replication. The first node (primary runtime server) *publishes* or replicates, the database to the high availability runtime server and the reporting server. These two servers are referred to as *subscribers* of the database replication.

Select **Yes** to open the First Node Access Configuration screen.

Step 3 In the **First Node Access Configuration** screen, enter these values *for the first node (the Primary Runtime server)*:

- a. Host Name
- b. IP Address
- c. Security Password (enter and confirm)
- d. Select **OK**.

Scripts run to validate the connection. When they complete, the Successful Connection to First Node screen displays

Step 4 In the **Successful Connection to First Node** screen, select **Continue**.

The SMTP Host Configuration screen opens.

Step 5 In the **SMTP Host Configuration** screen, select whether you want to configure an SMTP host for outbound email.

If	Then
You want to configure an SMTP Host.	Select Yes . The second SMTP screen opens. Proceed to Step 5.
You do not want to configure an SMTP Host.	Select No . The Platform Configuration Confirmation screen opens. Proceed to Step 6.

Step 6 In the second **SMTP Host Configuration** screen, enter configuration parameters for the SMTP Host.

- a. Enter the hostname or IP address for the SMTP server.
- b. Select **OK**.

The Platform Configuration Confirmation screen opens.

Step 7 In the **Platform Configuration Confirmation** screen:

If	Then
You want to open the Node Type Selection screen.	Select OK . Proceed to Step 7.
You want to revisit screens to modify the configuration.	Select Back .

Step 8 In the **Node Type Selection** screen:

- a. Select high availability runtime server or reporting server.
- b. Select **OK**.

The installation process continues.

An informational Production Licensing screen displays.

An informational Cryptographic Export Warning screen displays.

The installation ends at a login prompt.



Chapter 3

After the Installation

Completing the Initial Configuration Wizard

A Guided Initial Configuration Wizard displays at the initial logon to the Expert Advisor operations console. This wizard guides you through a number of essential configuration entries.

Use this worksheet to collect information you will need to supply on the Guided Initial Configuration Wizard screens.

License file	
Location	
Primary runtime server	
Name	
Host Address	
High availability runtime server	
Name	
Host Address	
Reporting server	
Host Address	
Maximum size of buffer for reporting messages on the primary runtime server. 2048MB (2G)	

Additional Tasks

is both the default value and the maximum recommended value.	
Cisco Unified Presence server	
Host Address	
Fully-qualified domain name	
User name	
User password	
Active Directory server	
Host Address	
Port	
Manager Distinguished Name and	
Password	
User search base	
DNIS Values	
Start of range	
End of range	

Additional Tasks

You must perform additional installations, configurations to complete the Cisco Unified Expert Advisor deployment.

You can find details and procedures for these tasks in the *Administration and Configuration Guide for Cisco Unified Expert Advisor*.



Appendix A

Frequently Asked Questions about the Installation

- [Can My Cisco Support Provider Log In to Assist Me? \(page 30\)](#)
- [Explain Error Message about "No Such File or Directory" \(page 30\)](#)
- [How are the System and the Databases Upgraded? \(page 34\)](#)
- [How Do I Access Log Files? \(page 30\)](#)
- [How do I Add or Replace a Device in the Cluster? \(page 31\)](#)
- [How Do I Configure the High Availability and Runtime Servers before I Install Them? \(page 31\)](#)
- [How Do I Format a USB Key to the FAT32 File System? \(page 32\)](#)
- [How do I Use the Recovery Disk? \(page 33\)](#)
- [How do I Log In to the Cisco Unified Expert Advisor operations console? \(page 33\)](#)
- [How Do I Test Server Connectivity? \(page 33\)](#)
- [How is Data Handled During an Upgrade? \(page 34\)](#)
- [Is Cisco Unified Expert Advisor Supported in a Hosted Deployment? \(page 34\)](#)
- [What are the User Roles for Cisco Unified Expert Advisor? \(page 34\)](#)
- [What Accounts and Passwords are Defined During the Installation? \(page 35\)](#)
- [What is the Advantage of the Cisco Unified Expert Advisor Reporting Server? \(page 36\)](#)
- [What is the URL for the Cisco Unified Expert Advisor Operations Console? \(page 36\)](#)
- [Where is a Fresh Installation Installed? \(page 36\)](#)

Can My Cisco Support Provider Log In to Assist Me?

- [Where is an Upgrade Installation Installed? \(page 36\)](#)
- [Why do I receive a Network Error for the DNS Server? \(page 37\)](#)
- [Why Does a System Upgrade Take a Long Time without Issuing any Error Message? \(page 37\)](#)

Can My Cisco Support Provider Log In to Assist Me?

Yes. There is a utility that allows Cisco technicians to troubleshoot your system, its configurations, and databases.

You can set up and enable a time-limited access account to your system using the CLI command **utils remote_account**.

You can also implement this utility from the Cisco Unified Operating System Administration Console (select **Services > Remote Support**).

The procedure to do this is documented in the online help for the Cisco Unified Operating System Administration Console.

Explain Error Message about "No Such File or Directory"

During installation on some servers, you might see an error similar to this:

```
rmmmod: ohci_hcd: no such file or directory
```

This is a benign message related to USB driver modules and can be safely ignored.

The installation attempts to delete all modules on the server before loading new ones. If a module does not exist on the server where the installation is running, a message indicates that there is no such file to be deleted. Messages differ slightly for different driver names.

How Do I Access Log Files?

If you encounter problems with the installation, you can obtain and examine the install log files by entering the following commands in Command Line Interface.

- To obtain a list of all install log files from the command line, enter the CLI command **file list install ***.
- To view the log file from the command line, enter the CLI command **file view install <log_file>** where **log_file** is the log file name.

Other ways to access log files are as follows:

- Using the CLI `file dump` commands: `file dump activelog`, `file-spec`, and `file dump inactivelog`
- Using the Syslog Viewer in the Real-Time Monitoring Tool (RTMT). You can download RTMT from the Cisco Unified Expert Advisor operations console. (**Tools > RTMT Plugin Download**)

How Do I Add or Replace a Server in the Cluster?

To add a server (for example, to add a reporting server if you did not originally deploy one):

1. Verify that the new or replacement server meets the hardware requirements outlined in the [Hardware and System Software Specification \(Bill of Materials\)](http://www.cisco.com/en/US/products/sw/custcosw/ps1001/products_user_guide_list.html) (http://www.cisco.com/en/US/products/sw/custcosw/ps1001/products_user_guide_list.html).
2. Make sure that the other servers in the cluster are up and running.
3. Run a fresh (DVD) installation on the new or replacement server.
4. Apply any upgrades and updates to the server so that it is running the same software as the other servers in the cluster.
5. Test that the new server can connect to the other servers in the cluster. See the [FAQ on testing connectivity \(page 33\)](#).

How Do I Configure the High Availability and Runtime Servers Before I Install Them?

When the first node (primary runtime server) installation is complete, and *before* you install the high availability and reporting servers, you must log in to the Cisco Unified Operations Console online interface to configure those servers.

1. Access a browser and log in to the Cisco Unified Expert Advisor operations console. See the [FAQ on logging in \(page 33\)](#).
2. Click **Cancel** at the Initial Configuration Wizard.
3. Click the **System Management Drawer**.
4. To configure the High Availability Server:
 - Select **Runtime Servers**.
 - Click **Add High Availability**.
 - Enter the Name and Host Address.
 - Click **Save**.

How Do I Format a USB Key to the FAT32 File System?

5. To configure the Reporting Server:
 - Select **Reporting Servers**.
 - Click **Add New**.
 - Enter the Name and Host Address.
 - Click **Save**.

Warning: If you do not configure these servers in the Cisco Unified Expert Advisor operations console before you install them, the installation will proceed but will complete with an error message.

How Do I Format a USB Key to the FAT32 File System?

If you use a USB key for the [Answer File Generator \(page 9\)](#), you might need to reformat the USB key to the FAT32 file system beforehand.

A reformat is often necessary for USB keys with larger storage capacity (for example, 1 Gigabyte) that are formatted with the FAT file system.

You can use the Windows XP Disk Management Utility to reformat a USB key to the FAT32 file system as follows.

Note: You might need to be logged in as an administrator or a member of the Administrators group to perform these tasks.

1. Insert the USB key into a USB slot on the Windows XP PC.
2. Choose **Start > Control Panel > Administrative Tools** and then double-click **Computer Management**.
3. Expand the Storage tree and click **Disk Management**.
4. Right-click the Removable Disk icon and click **Format**.
5. Click **Yes** in the message asking if you are sure that you want to format this partition.
6. Click the File System: pull down and select FAT32.
7. Click **OK**. When prompted to format the volume, click **OK** again.

The Removable Disk icon text should now show the file system format as FAT32.

How Do I Log In to the Cisco Unified Expert Advisor operations console?

When the installation completes, direct a browser to the URL for the Cisco Unified Expert Advisor operations console. The URL is `http://<HOST ADDRESS>` where HOST ADDRESS is the IP Address or Hostname of your server.

Enter the application user ID and password that you defined during installation. Refer to your [Configuration Worksheet \(page 8\)](#).

How Do I Test Server Connectivity?

There is a step to [test network connectivity \(page 25\)](#) during the installation of the high availability and reporting servers. You can also run a basic check that one server can connect to another using this CLI command: `utils network ping`.

How Do I Use the Recovery Disk?

The installation package includes a Recovery Disk on CD media.

The purpose of this disk is to help you to recover from a catastrophic failure, such as an unbootable system.

To use the Recovery Disk, insert it into the tray and boot up into it.

The Recovery Disk has the following options:

- [S]/[s]: Swaps the active and inactive partitions (that is, boots the system with the earlier active version, which is currently inactive). This option is displayed only if there is a valid inactive partition in the system.
- [W]/[w]: Windows Pre-Installation Set-up. Reimages the system and prepares it for a Windows installation.
- [F]/[f]: Checks the file system and automatically corrects it.
- [M]/[m]: Checks the file system and manually corrects it.
- [V]/[v]: Verifies the disk partitioning layout and displays the disk partitions on the screen.
- [Q]/[q]: Quits the recovery disk program and asks you to reboot the system.

How Is Data Handled During an Upgrade?

[Data migration occurs during an upgrade installation \(page 36\)](#). This data includes logs and the database.

Warning: Do not make configuration changes from the start of the upgrade process until you have activated the inactive partition and rebooted the system.

If you decide to downgrade and switch/restart the system to the *inactive* partition that contains the *older version* of the software, any configuration changes that you made since upgrading will be lost.

Is Cisco Unified Expert Advisor Supported in a Hosted Deployment?

In this release, each Cisco Unified Expert Advisor instance is dedicated to a single customer.

Support for a hosted contact center is planned for a future release.

However, Cisco Unified Expert Advisor can work in conjunction with a Unified ICMH or Unified CCH environment—the Unified ICMH or Unified CCH can be multi-tenant and have one Cisco Unified Expert Advisor deployment per customer.

What Are the User Roles for Cisco Unified Expert Advisor?

Cisco Unified Expert Advisor supports three user roles: super users, administrators, and reporting users.

Cisco Unified Expert Advisor Super Users

During the installation, an application user is created on the [Application User Configuration screen \(page 23\)](#). This application user becomes the initial (default) Cisco Unified Expert Advisor *super user*.

The installation passes the username and password for this application user to the User Management screen in the Cisco Unified Expert Advisor operations console.

The default super user can add other super users and administrators in the Cisco Unified Expert Advisor operations console. These added users must be defined in Active Directory.

Super users have access to all Daily Management features. In addition, super users can perform functions including (but not limited to):

- Installing Upgrades
- Running Disaster Recovery System (DRS) functions such as Backup and Restore

- Creating, configuring, and maintaining other system administrators and administrators
- Making system configuration changes, such as configuring connection information for the Cisco Unified Presence server, Unified CVP, SIP, and SMTP.
- Accessing Serviceability functions
- Downloading the Reporting template zip file and the Real-time Monitoring Tool (RTMT)

Cisco Unified Expert Advisor Administrators

Cisco Unified Expert Advisor administrators are created by the super user from the Cisco Unified Expert Advisor operations console (**Administration > User Management**).

Administrator users perform Daily Management functions such as adding and maintaining Assignment Queues, Agents, Skill Groups, Message Sets, and Attributes.

Cisco Unified Expert Advisor Reporting users

Cisco Unified Expert Advisor reporting users are created in the Cisco Unified Expert Advisor operations console after the installation. There can be multiple reporting users. They have read-only access to the Reporting database and can generate reports using the Cisco predefined templates.

All of these tasks are documented in the *Operations, Administration, Maintenance, and Provisioning Guide* and in the online help for the Cisco Unified Expert Advisor operations console.

What Accounts and Passwords are Defined During the Installation?

During the installation, you specify three passwords: administrator user, application user, and database access security. All three must start with an alphabetic character, must be at least six characters long, and can contain alphanumeric characters, hyphens, and underscores. Only one of these (the *application user* and password) is passed to the Cisco Unified Expert Advisor online operations console.

- **Installation Administrator account password**

The administrator account username and password defined in the installation wizard is used to access the CLI from an SSH client. It is also used to access the Disaster Recovery System and the Cisco Unified OS Administration interfaces.

You can add administrators using the CLI command `set account` and delete then using CLI command `delete account`. You can also change the administrator password using the CLI command `set password admin`.

- **Installation Application User password**

The application user defined in the installation wizard is the default super user for the Cisco Unified Expert Advisor operations console.

What Is the Advantage of the Cisco Unified Expert Advisor Reporting Server?

The password for the application user allows an initial login to the Cisco Unified Expert Advisor operations console. That initial super user can create additional super users in the User Management screen or by using the CLI command `set account`.

The application user created in the installation does not need to be set up in Active Directory. However, additional application users created through the Cisco Unified Expert Advisor operations console must be set up through Active Directory.

- **Installation Security Password**

The security password defined in the installation wizard is used by the system for the database security password to authorize communications between devices. This password must be identical on all servers in the cluster.

You can change the security password using the CLI command `set password security`.

What Is the Advantage of the Cisco Unified Expert Advisor Reporting Server?

It is optional to install the reporting server. The advantage of doing so is that reports generated from the Historical Reports templates provide additional detail on Expert Advisor call activity and statistics than what is available from the WebView reports.

What Is the URL for the Cisco Unified Expert Advisor Operations Console?

The URL for the Cisco Unified Expert Advisor operations console is `http://<HOST ADDRESS>` where HOST ADDRESS is the IP Address or Hostname of your server.

Where Is a Fresh Installation Installed?

All Cisco Unified Expert Advisor servers have an active bootable partition, an inactive bootable partition, and a common partition.

The installation creates these partitions, and a fresh (first-time) installation places the new Cisco Unified Expert Advisor software and operating system on the *active* partition. The system boots up and operates on the *active* partition.

Where Is an Upgrade Installation Installed?

All Cisco Unified Expert Advisor servers have an active bootable partition, an inactive bootable partition, and a common partition.

Upgrade versions are installed on the *inactive* partition.

[Data migration occurs during the upgrade \(page 29\)](#). This data includes logs and the database.

To complete the upgrade, you switch partitions.

You do this using the CLI command `utils system switch-version`.

You can also do this from the Cisco Unified Communications Operating System Administration screen. Navigate to **Settings > Version**. This opens the Version Settings screen, which shows the software version on both the active and inactive partitions. To switch versions and restart, click **Switch Versions**. When the system restarts, it boots to the now-active (formerly inactive) partition with your migrated data in place.

Why do I receive a Network Error for the DNS Server?

If you configure a DNS client during the installation or upgrade process, ensure that you have configured the host name of the Unified Expert Advisor server on the DNS server. Without this cross configuration for the reverse DNS lookup, the network connectivity check fails and a Network Connectivity Check Failure message is issued.

Why Does a System Upgrade Take a Long Time without Issuing any Error Messages?

Sometimes, the primary DNS server becomes unavailable and the upgrade takes a long time to complete. During this time, the system does not issue any error messages in the log file. Even if the secondary DNS server is configured and functioning, this problem continues to persist.

Verify that the primary DNS server is reachable. Determine if the Unified Expert Advisor's A and PTR records are configured in the DNS server for the required Unified Expert Advisor servers. The A record maps a host name to the IP address of the host. The PTR record allows you to perform a reverse DNS lookup of an IP address to obtain the mapped hostname.

The A and PTR record configuration is done in the DNS server:

- For a fresh install, the configuration is part of the DNS configuration during the installation process.
- For an upgrade, run the `utils diagnose` test through the Unified Expert Advisor CLI to validate network configurations (including DNS).

You must either resolve the problems associated with the primary DNS server or set the secondary DNS to be the primary on all Unified Expert Advisor servers.

To verify the current DNS server configuration, SSH to the Unified Expert Advisor server and issue the following command from the CLI console: `utils diagnose test`.

Why Does a System Upgrade Take a Long Time without Issuing any Error Messages?

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