

SAM Install Process SDP - 6.45

Blackchair Spotlight Spotlight Asset Management (SAM) Installation Process

Version 6.45

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Introduction

This document describes the **Software Asset Management (SAM)** plugin.

SAM is a part of **Spotlight Audit** module that counts usage of supported Genesys license features, according to rules specified by Genesys. SAM is part of the Spotlight framework and is installed with Spotlight Audit with generic settings.

This configuration guide contains a list of the supported Genesys license features, with details of the applicable rules. Further sections describe the configuration required within Genesys to support license feature counting, and the information required to configure **SAM** correctly. The process for configuring SAM is described.

The target audience for this document are Genesys, Partner and customer staff responsible for configuring **Genesys** and **SAM**. Prior knowledge of **Genesys Management Framework** and other relevant components is assumed.

If a customer wishes to use the **SAM** reporting it must be configured to collect the usage relevant to the specific Genesys license features in use at that customer. Data is continuously collected, aggregated and purged. The **SAM** report is generated from the **Spotlight Audit** user interface into an Excel report onto the users desktop. Further information on how to request the report is included in **Spotlight Audit** user training. The report can be used as an official return to Genesys showing the license usage.

SAM is only applicable to a production Genesys environment, however customers may also wish to install against no production environments.

Supported Genesys License Features

Software Asset Management supports the **Genesys Concurrent** and **Enabled** licensing models. A standard configuration assumes all

applicable features are one model or the other; sites with a mixture of models or with requirement to report on both models simultaneously should contact their Genesys Account Management team. Sites with non-standard licensing model should contact their Genesys Account Management team.

The standard license usage report covers the entire Genesys environment, i.e. the complete production CME, with peak reporting at the day level. Sites that require more granular reporting, intra-day or sub-sets of the complete environment, should contact their Genesys Account Management team. The following table shows the Genesys license features currently supported by SAM.

Feature	Inbound Voice
Definition - enabled	Count of defined seats with associated switch not type 0 (Unknown Switch), 72 (SIP Switch) or 63 (OM Switch). Seats are of DN type 1,2 (ACDPos, Extension) and must be associated with an active agent Place object. Multiple DNs associated with a single agent place are counted as one enabled seat.
Definition – concurrent	Maximum logged-in agents with associated switch not type 0 (Unknown Switch), 72 (SIP Switch) or 63 (OM Switch)

Feature	Network Voice			
Definition - enabled	If any Switch objects are "type"= 43	55	56 then as for "Inbound Voice"; if not count is zero.	
Definition – concurrent	If any Switch objects are "type"= 43	55	56 then as for "Inbound Voice"; if not count is zero.	

Feature	SIP Interaction
Definition - enabled	Count of defined seats with associated switch type 72 (SIP Switch). Seats are of DN type 1,2 (ACDPos, Extension) and must be associated with an active agent Place object. Multiple DNs associated with a single agent place are counted as one enabled seat.
Definition – concurrent	Maximum logged-in agents with associated switch type 72 (SIP Switch).

Feature	SIP Qualification Parking
Definition - enabled	N/A
Definition – concurrent	no longer directly sold, but lots of this out there. It's MCP without advanced GVP features. Was named Media Server. Must be targeted at MCPs that are not serving vXML, ASR, TTS, or advanced features

Feature	HA SIP Qualification Parking
Definition - enabled	N/A
Definition – concurrent	Match SIP Qualification Parking

Feature	SIP Communication
Definition - enabled	Count of defined seats with associated switch type 72 (SIP Switch). Seats are of DN type 1,2 (ACDPos, Extension) and must NOT be associated with an active agent Place object. So like Inbound Voice but with specific switch type and not associated with a place

Definition – concurrent	<p>In ApplicationCME what applications exist with type=15 (URS)? Do any link to an application with type 8 (DAP)? If no count is zero. If yes count is max logged in agents.</p> <p>Link is via AppServerCME</p> <p>ApplicationCME.dbid -> AppServerCME.app_server_dbid -> ApplicationCME</p>
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Feature	SIP Business Continuity
Definition - enabled	As for SIP Interaction
Definition – concurrent	As for SIP Interaction

Feature	Outbound Voice (Contact)
Definition - enabled	Defined agents associated with an agent group associated with a campaign group + Defined agents associated with a place associated with a place group associated with a campaign group
Definition – concurrent	Maximum logged-in agents associated with an agent group associated with a campaign group + Maximum logged-in agents associated with a place associated with a place group associated with a campaign group

Feature	Outbound Preview
Definition - enabled	Defined associated with an agent group associated with a campaign group with "dial-mode"=3 + Defined agents associated with a place associated with a place group associated with a campaign group with "dial-mode"=3
Definition – concurrent	Maximum logged-in agents associated with an agent group associated with a campaign group with "dial-mode"=3 + Maximum logged-in agents associated with a place associated with a place group associated with a campaign group with "dial-mode"=3

Feature	Genesys Email
Definition - enabled	The number of distinct PlaceIDs for the email logins over the previous 24 hours.
Definition – concurrent	Maximum logged-in agents with associated endpoint is type=media, media-type=email

Feature	Genesys Chat (Web Media)
Definition - enabled	The number of distinct PlaceIDs for the chat logins over the previous 24 hours.
Definition – concurrent	max logged-in agents with associated endpoint is type=media, media-type=chat

Feature	Genesys IWD
Definition - enabled	The number of distinct PlaceIDs for the third party work item logins over the previous 24 hours. Third Party Work items are any that are not email, chat, rss, facebook, twitter, sms
Definition – concurrent	max logged-in agents with associated endpoint is type=media, open-media, not email, chat, rss, facebook, twitter, sms

Feature	Genesys Social Engagement
Definition - enabled	The number of distinct PlaceIDs for the social media logins over the previous 24 hours.
Definition – concurrent	max logged-in agents with associated endpoint is type=media, open-media, is 'facebook', 'twitter' or 'rss'

Feature	Genesys SMS
Definition - enabled	The number of distinct PlaceIDs for the SMS logins over the previous 24 hours.
Definition – concurrent	max logged-in agents with associated endpoint is type=media, open-media, is 'sms'

Feature	HA - Voice
Definition - enabled	Count of defined seats in Spotlight associated with a Tserver application (type=1) with redundancy_type <> 1 associated with a switch not type 0 (Unknown Switch), 72 (SIP Switch) or 63 (OM Switch). Seats are of DN type 1,2 (ACDPos, Extension) and must be associated with an active agent Place object Multiple DNs associated with a single agent place must just be counted as one enabled seat.
Definition – concurrent	Maximum logged-in agents with associated switch not type 0 (Unknown Switch), 72 (SIP Switch) or 63 (OM Switch) associated with a Tserver application (type=1) with redundancy_type <> 1.

Feature	HA - SIP
Definition - enabled	Agents defined in Spotlight associated with a Tserver application (type=1) with redundancy_type <> 1 associated with a switch type 72. Multiple DNs associated with a single agent place must just be counted as one enabled seat.
Definition – concurrent	Maximum logged-in agents associated with a Tserver application (type=1) with redundancy_type <> 1 associated with a switch type 72.

Feature	CIM Platform
Definition - enabled	Count of defined seats in Spotlight. Seats are of DN type 1,2 (ACDPos, Extension) and must be associated with an active agent Place object and DN must not exist in IVRPortCME. The above works for “voice” only environments but does not count any non-voice interactions. These can be determined by looking at the unique PlaceID logins over the span of the measurement period. Use the LOGIN table and count the distinct Places over the 24 hour period (similar to counting the email, chat, SMS etc Places but without the filter for type)
Definition – concurrent	Max logged-in agents associated with DN not type 7 (GVP) and DN must not exist in IVRPortCME.

Feature	Framework Standalone (CTI)
Definition - enabled	Count of defined seats with associated switch not type 0 (Unknown Switch), 72 (SIP Switch) or 63 (OM Switch). Seats are of DN type 1,2 (ACDPos, Extension).
Definition – concurrent	If any applications exist with type=15 (URS) connected to an application with type=8 (DAP) the count is maximum logged in agents; if none exist the count is zero.

Feature	HA - CIM Platform
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Definition - enabled	As for CIM Platform
Definition – concurrent	As for CIM Platform

Feature	Genesys Workforce Manager
Definition - enabled	Count of records in WM_SCHEDULE_DAYS for wm_date=current date with number of unique gsw_agent_id with wm_day_type 0
Definition – concurrent	As enabled

Feature	Genesys Info Mart
Definition - enabled	If there is at least one application with type=55 (GIM) count is defined seats. Seats are of DN type 1,2 (ACDPos, Extension) and are associated with an active agent Place object. If not count is zero
Definition – concurrent	If there is at least one application with type=55 (GIM) count is max logged-in agents. If not count is zero

Feature	HA - Genesys Info Mart
Definition - enabled	As for Genesys Infomart
Definition – concurrent	As for Genesys Infomart

Feature	Genesys Interactive Insights
Definition - enabled	As for Genesys Info Mart
Definition – concurrent	As for Genesys Info Mart

Feature	Interaction Workspace
Definition - enabled	Maximum logged-in agents to Interaction Workspace by distinct PlaceID
Definition – concurrent	Maximum logged-in agents to Interaction Workspace

Feature	Genesys Agent Desktop
Definition - enabled	There is no enabled count rule for this feature.
Definition – concurrent	Maximum logged-in agents from GSD webserver.

Feature	Agent Connector
Definition - enabled	There is no enabled count rule for this feature.
Definition – concurrent	Calculation of Inbound Voice + SIP Interaction – Interaction Workspace. (Some of these counts may be zero)

Feature	Gplus for eWFM
Definition - enabled	<p>The Gplus application (type 23 in the Spotlight ApplicationCME table) has an Option section genesys.agentGroups. The opt field has either the name of an agent group or *.</p> <p>If * that means all the enabled configured agents.</p> <p>If a name the value field is relevant; if value=exclude it means don't count the agents in the group; otherwise count the agents in the group.</p> <p>There may be multiple records in AppOptionCME as there can be multiple groups defined in the genesys.agentGroupssection.</p> <p>Having found all the records count up the distinct agents in the agentGroups.</p>
Definition – concurrent	As for enabled

Feature	GVP
Definition - enabled	There is no enabled count rule for this feature
Definition – concurrent	Count of active calls (ports) in use via GVP SNMP MIB request mcpSipScalarTable/mcpSipCurrentInboundSessions + mcpSipScalarTable/cpSipCurrentOutboundSessions

Feature	IVR Connector
Definition - enabled	Count of defined IVR ports
Definition – concurrent	There is no concurrent count rule for this feature.

Feature	Media Server
Definition - enabled	There is no enabled count rule for this feature.
Definition – concurrent	Count of active calls (ports) in use via GVP SNMP MIB request mcpSipScalarTable/mcpSipCurrentInboundSessions + mcpSipScalarTable/mcpSipCurrentOutboundSessions

Feature	ASR Ports (GVP)
Definition - enabled	There is no enabled count rule for this feature.
Definition – concurrent	Count of active speech recognition sessions in use via GVP SNMP MIB request mcpSpeechSessionTable/mcpCurrRecogSessions

Feature	TTS Ports (GVP)
Definition - enabled	There is no enabled count rule for this feature.
Definition – concurrent	Count of active speech synthesis sessions in use via GVP SNMP MIB request mcpSpeechSessionTable/mcpCurrSynthSessions

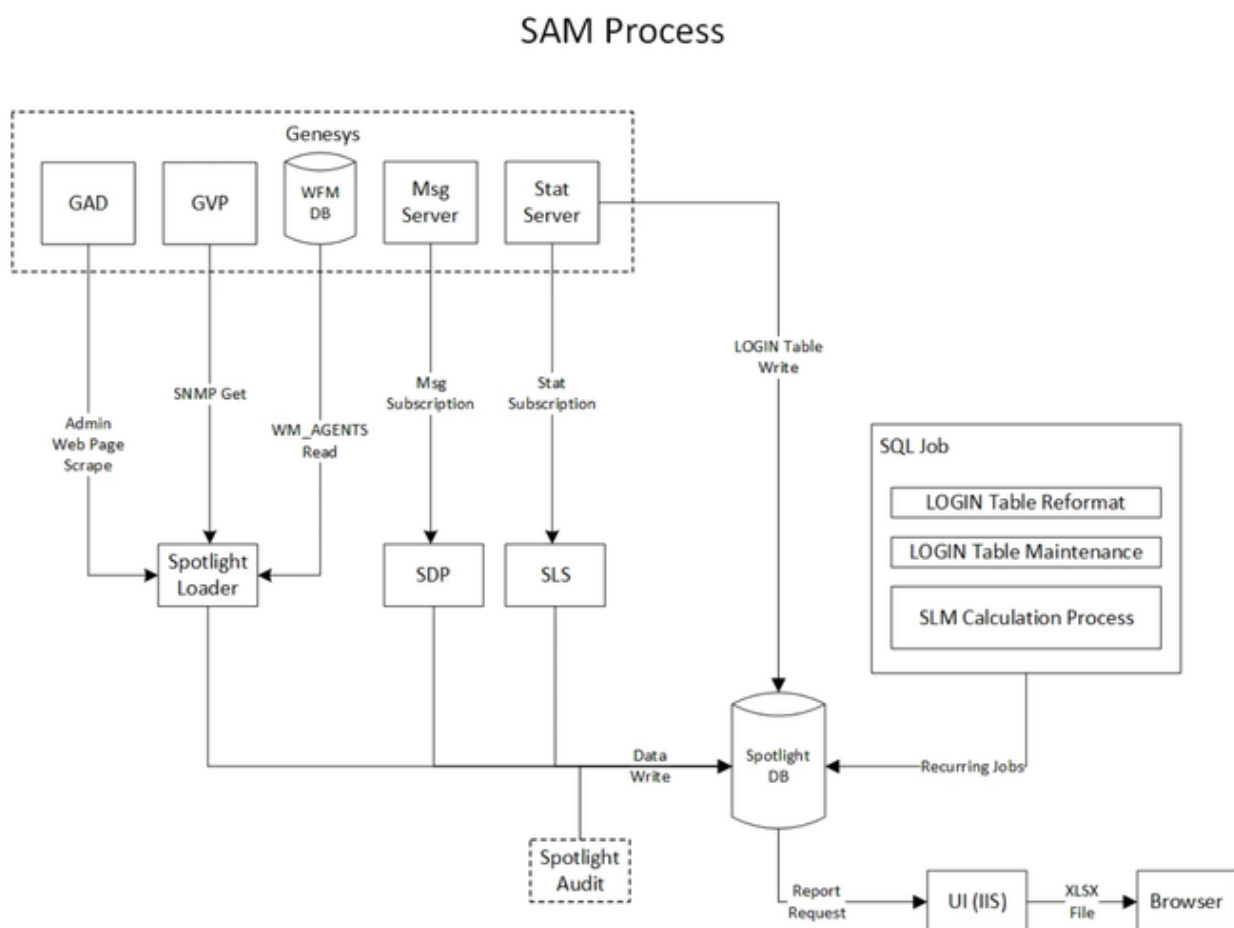
Feature	SIP Voicemail
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Definition - enabled	DNs with associated flex prop "Tserver" with associated flex prop "gvm_mailbox" . + Persons with associated flex prop "Tserver" with associated flex prop "gvm_mailbox"
Definition – concurrent	As for enabled

Feature	Proactive Contact - voice
Definition - enabled	Defined agents associated with an agent group associated with a campaign group with "dial-mode"=11 or 10 or 9 + Defined agents associated with a place associated with a place group associated with a campaign group with "dial-mode"= 11 or 10 or 9
Definition – concurrent	Maximum logged-in agents associated with an agent group associated with a campaign group with "dial-mode"= 11 or 10 or 9 + Maximum logged-in agents associated with a place associated with a place group associated with a campaign group with "dial-mode"=11 or 10 or 9

SAM Architecture Overview

The high-level SAM architecture is shown below



The source of license usage data varies according to the licensing model – concurrent or enabled – and the features relevant to a particular customer.

- Some usage data comes from the data within the **Spotlight Core Audit** product.
 - this usage data does not require additional configuration or pre-requisites
- Some usage data comes from a **Genesys Statserver**, both by directly querying the **Statserver** using the **SDK** and by processing data in a standard **Genesys LOGIN** table written in the **Spotlight database**. A **statserver** pair must be connected to all the **T-Servers**, **SIP Servers** and **Interaction Servers** in the **Genesys** system. For information on configuring **statserver** to write a **LOGIN** table please refer to the **Genesys Stat Server Deployment Guide**. A statserver pair dedicated to Spotlight is recommended but a shared statserver can be used if necessary.
 - Spotlight requires a Statserver pair to connect to directly and to be writing its LOGIN table to the Spotlight database. Spotlight will connect to the statserver on its standard port and network connectivity must allow this and the connection to write to the Spotlight database.
 - Spotlight requires a configuration server or **writable CSProxy** pair to connect to and a **Genesys login** with minimum **Create** and **Change** permission to create **Agent Groups** in the **CME "Agent Groups"** folder and minimum **Read** and **Execute** permission on the whole **CME**. Spotlight will connect to the **statserver** and configuration **server/CSProxy** on its standard port and network connectivity must allow this.
- **GVP (Genesys Voice Platform)** license usage comes from querying **SNMP Master Agent(s)** connected to **GVP vXML** instance(s). This applies to **GVP port** counts and to **ASR** and **TTS** usage counts. You must configure one or more **SNMP Master Agents** to service all your **vXML GVP** instances. For information on configuring **SNMP Master Agents** to monitor **GVP** please refer to the **Genesys GVP Deployment Guide** and **Genesys Management Framework Deployment Guide**.
 - Spotlight will connect to the **SNMP Master Agents** on their port for incoming requests (gets) and network connectivity must allow this.
- **GAD (Genesys Agent Desktop)** license usage comes from querying the **GAD webserver(s)** for the number of agent connections.
 - Spotlight will connect to all the **GAD webserver** instances on their standard port and network connectivity must allow this. A login with read access to **GAD** is required.
- **WFM (Genesys Workforce Management)** license usage comes from a query of data in a schedule table in the **Workforce Management** database.
 - Spotlight requires access to the workforce management database through the standard database client (**SQL Server** or **Oracle**) and network connectivity must allow this. A database account with minimum read access to the **WM_SCHEDULE_DAYS** table is required.
- **IW (Interaction Workspace)** license usage comes directly from **Message Server** events.
 - this usage data does not require additional configuration or pre-requisites

SAM Configuration Items

Measurements of certain features are based on membership of **Agent Groups**.

SAM creates reserved Agent Groups and automatically maintains their membership as agents are created and deleted, based on rules specific to the relevant licensing features.

The following reserved Agent Groups are created in the **Agent Groups\SpotlightAssetMgmt** folder in **CME**:

- **BCSAMAllAgents**
- **BCSAMAgentsInboundVoice**
- **BCSAMAgentsSIPInteraction**
- **BCSAMAgentsHVoice**
- **BCSAMAgentsHASIP**

These Agent Groups and the folder must not be deleted or altered in any way. Membership of these Agent Groups must not be manually adjusted in any way.

The configuration of **SAM** requires a **Genesys CME login** and password that has permission to create **Agent Groups** in the **SpotlightAsset Mgmt** folder, and to add and delete membership of the groups. Once supplied this login must not be deleted or altered in any way, and the permissions on the **SpotlightAssetMgmt** folder and the **Agent Groups** inside must not be altered in any way.

If it becomes necessary to change the CME login or password supplied for SAM please contact blackchair support in advance at support@theblackchair.com

NOTE : when the **SAM** data loader runs for the first time following initial configuration it will perform the following configuration actions:

- Create the **SpotlightAssetMgmt** folder
- Create the **Agent Groups**
- Add the current population of agents into the appropriate **Agent Groups**

These actions occur when the "Spotlight Statserver Loader" service is started for the first time.

The third action may generate a large number of changes to **Agent Group** membership, however these changes are now fed gradually to Genesys. If you still want these initial changes to happen at another time after the **SAM** configuration, for example during a quiet period for the contact centre, you should delay starting the "Spotlight Statserver Loader" service until an appropriate time.

After this initialisation **Agent Group** membership is only updated individually when an agent is added or deleted in the Genesys configuration and the level of change is consequently low.

Pre-installation Worksheet

The **SAM Pre-install worksheet** asks customers for information about the configuration of their environment that is relevant to the **SAM** configuration, such as **statserver** location and **GVP SNMP Master Agent** details. The worksheet should be issued with only the details relevant to a particular customer, that is covering features actually in use at the customer.

The list of features at a customer is supplied by Genesys compliance department with an **encrypted entitlement file**. The encrypted file is an input into the **SAM configuration utility**, covered later.

Using the information provided open the '**SAM Pre-install**' document for the customer and on the '**General**' tab fill in the '**Customers Name**', '**Key Customer Contact Details**', and '**Genesys Licensing Model**'.

For the '**List Relevant License Features**' take the **SAM** license features provided and remove all those with value '0', then copy the remaining license names in to the '**List of Relevant License Features**' field within the '**General**' tab of the '**SAM Pre-install**' document.

This list will identify if the customer has licenses for the '**GVP**', '**GAD**' and '**WFM**', thus informing which worksheet tabs are relevant. If one or more of these are not visible in the list then the corresponding tabs in the '**SAM Pre-install**' document can be deleted.

Note the statserver tab is required at every customer.

Once the 'General' tab has been filled out and irrelevant tabs hidden, save the document and then send to the customer with request to fill in all the sections.

A customer may indicate that some licenses are not actually in use, and cannot complete details for **GVP, GAD or WFM**. In that case do not configure data collection for the unused features.

SAM Framework

The SAM framework is installed as part of a standard 'Spotlight Core Audit installation'. As part of this installation a 'Job_SLMIntradayAgg.sql' file was created and placed in the folder that was selected for the 'Install Assistant output' when the 'Spotlight Install Assistant' tool was run.

This sql requires to be run in **SQL Management** studio to create the necessary **Agent Job** that collates SAM data.

If SAM is being installed against multiple Spotlight environments, this sql file should be adjusted so that the name of the job is different for each environment, eg **SLMIntradayAgg_Prod, SLMIntradayAgg_Dev** etc

Open the sql file in any text editor and change the job name in two locations

```
USE [msdb]
GO

IF EXISTS (SELECT job_id FROM msdb.dbo.sysjobs_view WHERE name = N'SLMGenesysAgg')
EXEC msdb.dbo.sp_delete_job @job_name=N'SLMGenesysAgg', @delete_unused_schedule=1
GO
IF EXISTS (SELECT job_id FROM msdb.dbo.sysjobs view WHERE name = N'SAMIntradayAgg')
EXEC msdb.dbo.sp_delete_job @job_name=N'SAMIntradayAgg', @delete_unused_schedule=1
GO

USE [msdb]
GO

BEGIN TRANSACTION
DECLARE @ReturnCode INT
SELECT @ReturnCode = 0
IF NOT EXISTS (SELECT name FROM msdb.dbo.syscategories WHERE name=N'[Uncategorized (Local)]' AND category_class=1)
BEGIN
EXEC @ReturnCode = msdb.dbo.sp_add_category @class=N'JOB', @type=N'LOCAL', @name=N'[Uncategorized (Local)]'
IF (@@ERROR <> 0 OR @ReturnCode <> 0) GOTO QuitWithRollback
END

DECLARE @sysuser VARCHAR(255)
SELECT @sysuser = SYSTEM_USER

DECLARE @jobId BINARY(16)
EXEC @ReturnCode = msdb.dbo.sp_add_job @job_name=N'SAMIntradayAgg',
    @enabled=1,
```

SAM Entitlement Tool

Before **SAM** can be configured, as **BCSAM** entitlement file must be created. This file is an input into the **SAM Configuration Utility** and details the license types that **SAM** will track and the number of each license type the client is entitled to use.

A Genesys CPR file is required before a BCSAM file can be created.

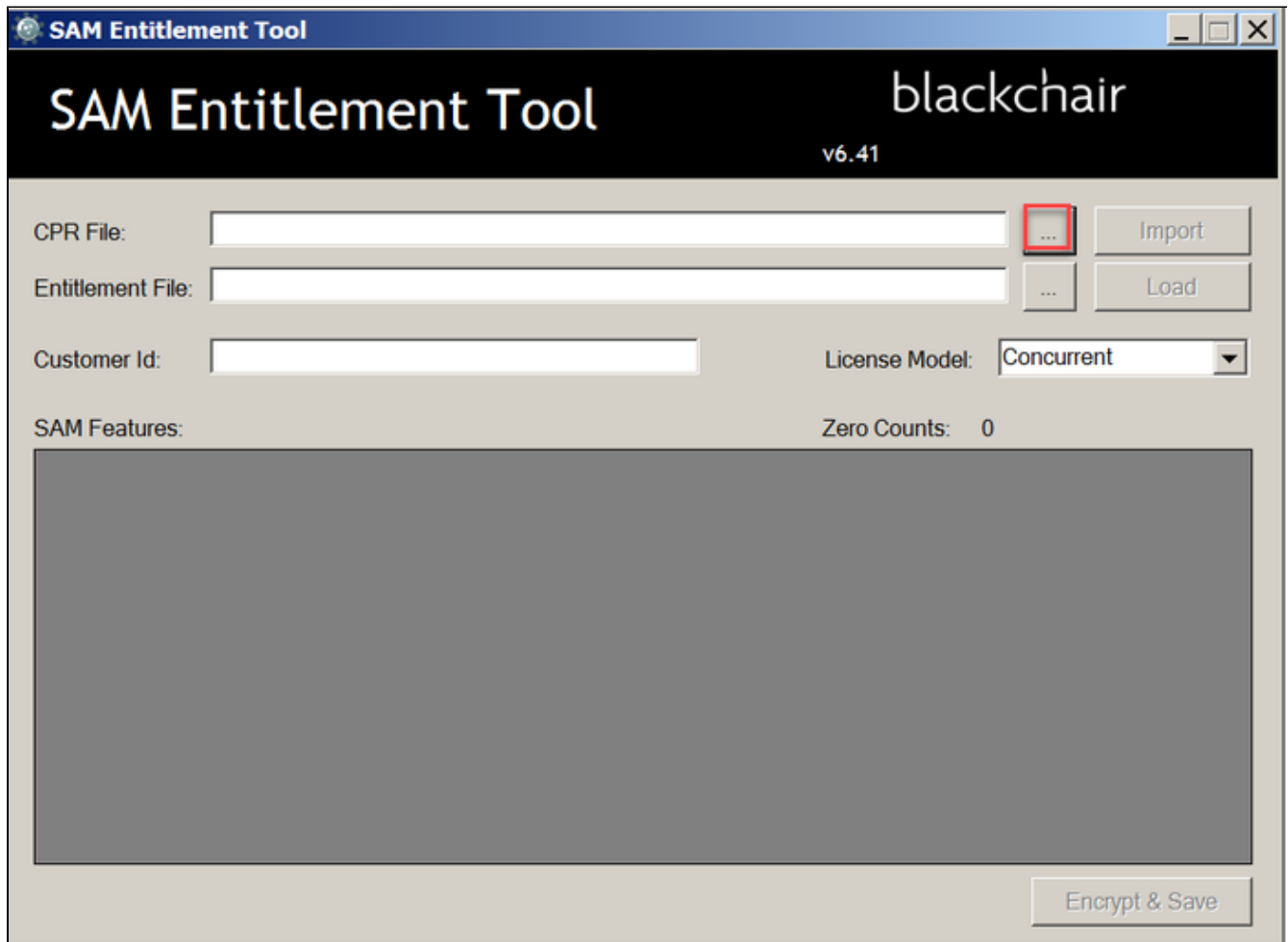
The CPR file comes from the Genesys Compliance Department. The Genesys Project Manager, Account Executive or Solution Architect can request the CPR file from the compliance team or directly to Craig.Beckerleg@genesys.com who is currently the named contact.

The compliance team should also advise which license model is in use - Concurrent or Enabled, as well as the customer reference.

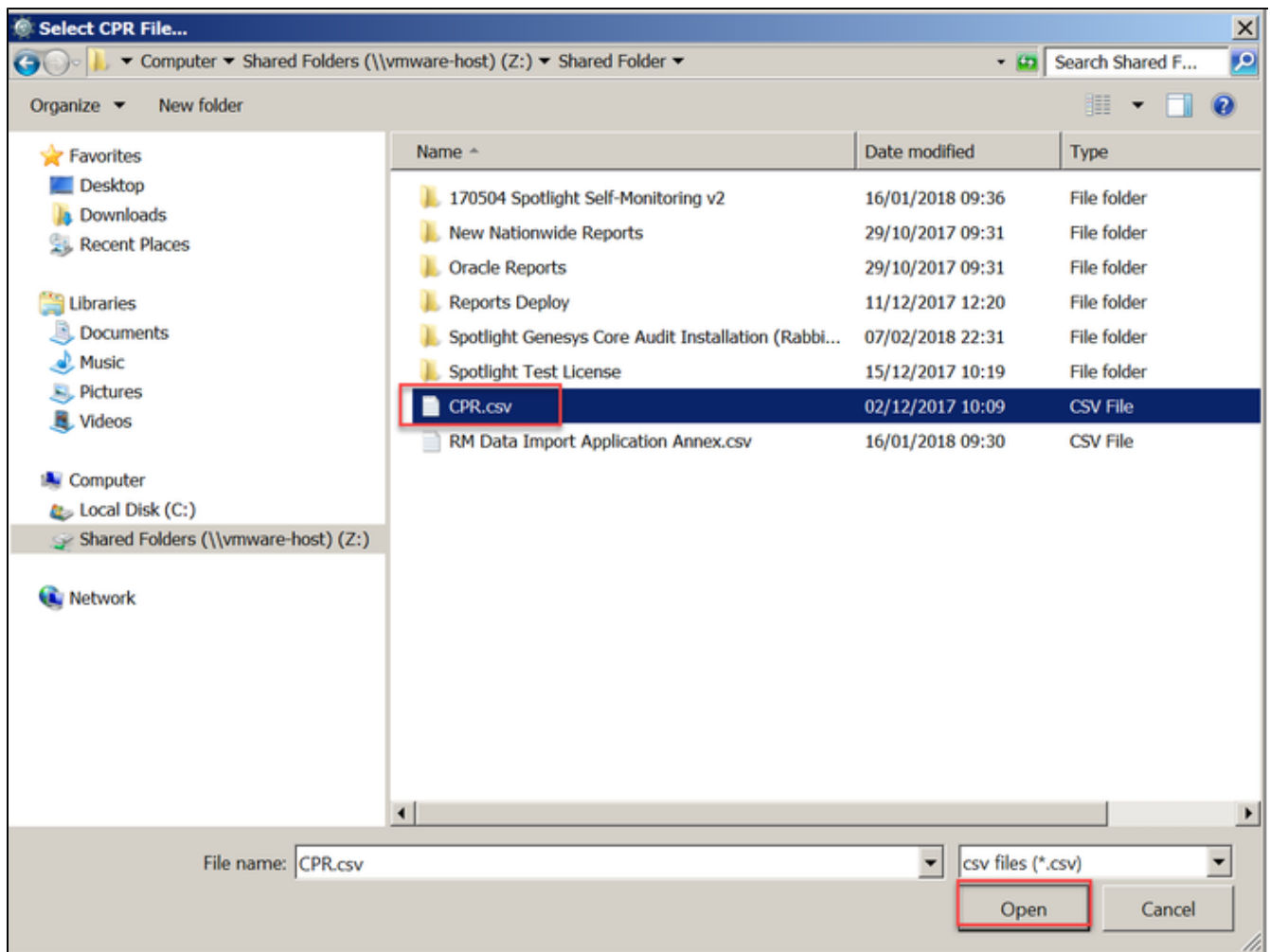
Once the CPR file has been received, it should be sent to Blackchair in order to generate the BCSAM file following the process below. In some cases, the compliance team may also provide the BCSAM file, in which case, Blackchair will not require to provide the BCSAM file also.

To generate a **BCSAM** file:

- Locate the **SAMEntitlementTool.exe** file, normally located in **Blackchair\Software\Spotlight Genesys Core Audit Installation\SAM Tools\SAM Entitlement Tool** folder
- Right click and select **Run as Administrator**
- Select the **CPR File Browse ...** button



- Locate the **CPR** file
- Select **Open**



- Select **Import**

SAM Entitlement Tool blackchair v6.41

CPR File: ... **Import**

Entitlement File: ... **Load**

Customer Id: License Model: **Concurrent** ▼

SAM Features: Zero Counts: 0

- Enter the **Customer ID or Name**
- Select the **License Model** from the drop down

SAM Entitlement Tool

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CPR File:
...
Import

Entitlement File:
...
Load

Customer Id:

License Model:

Concurrent
Concurrent
Enabled

Zero Counts:
1

SAM Features:

SAM Feature	Total Count
AgentConnector	0
ASRPortsGVP	0
CIMPlatform	2975
FrameworkStandaloneCTI	0
GenesysAgentDesktop	0
GenesysChatWebMedia	111
GenesysEmail	111
GenesysInfoMart	2983
GenesysInteractiveInsights	2975

Encrypt & Save

- For each SAM feature, you have the option to adjust the "Total Count", by manually entering a new vallue
- Select **Encrypt & Save**

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CPR File:

Z:\Shared Folder\CPR.csv

...

Import

Entitlement File:

...

Load

Customer Id:

DEMOSRV

License Model:

Concurrent

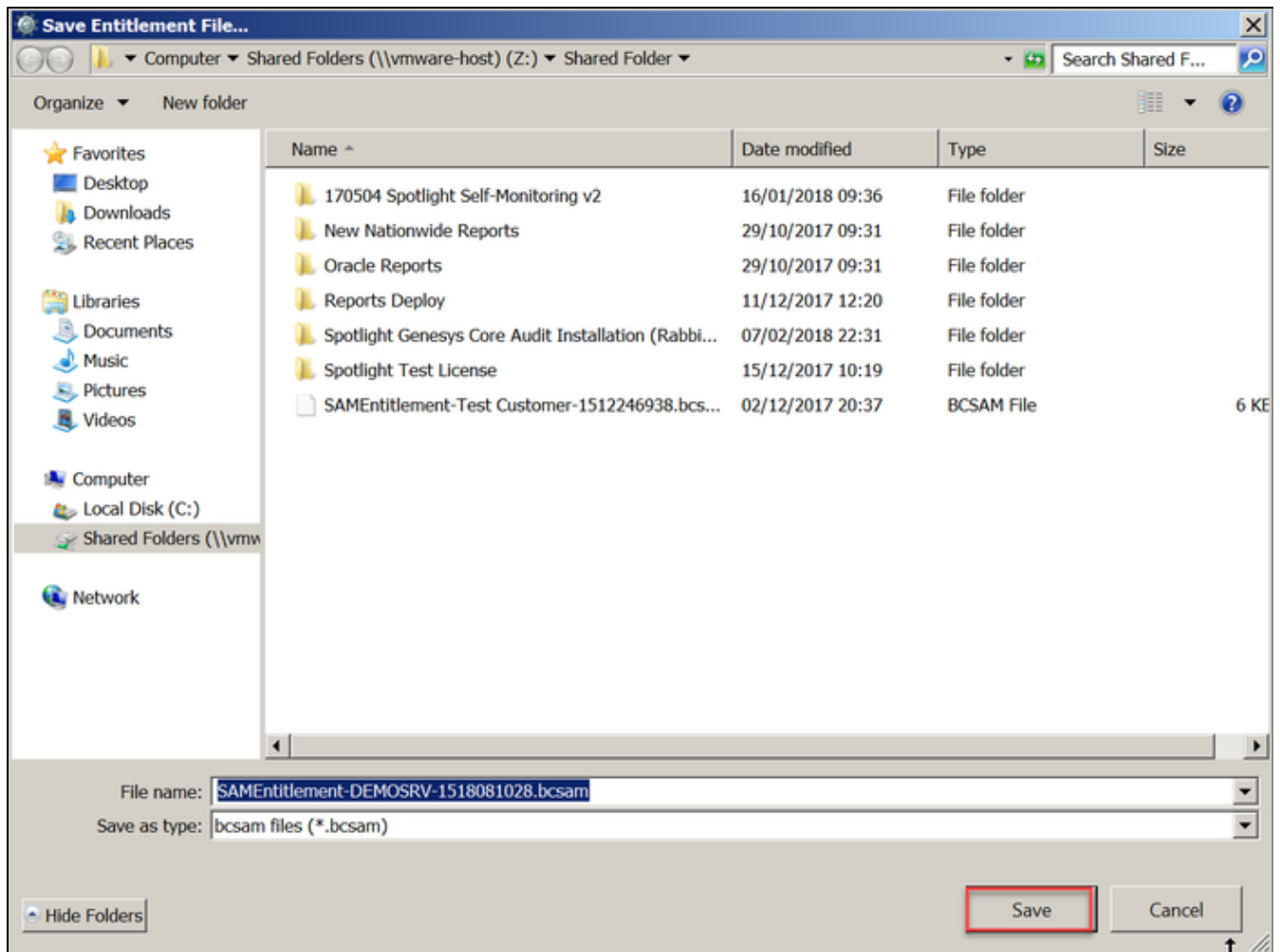
SAM Features:

Zero Counts: 19

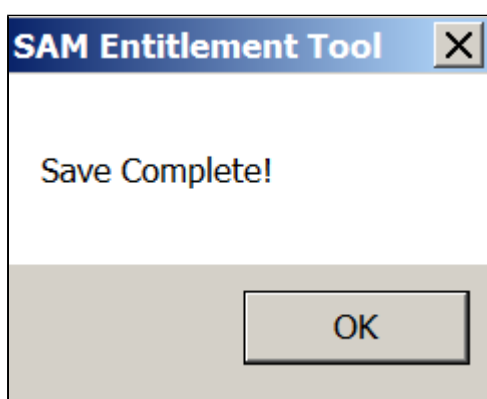
SAM Feature	Total Count
AgentConnector	0
ASRPortsGVP	0
CIMPlatform	2975
FrameworkStandaloneCTI	0
GenesysAgentDesktop	0
GenesysChatWebMedia	111
GenesysEmail	111
GenesysInfoMart	2983
GenesysInteractiveInsights	2975

Encrypt & Save

- Specify the location to save the **BCSAM** file
- Select **Save**

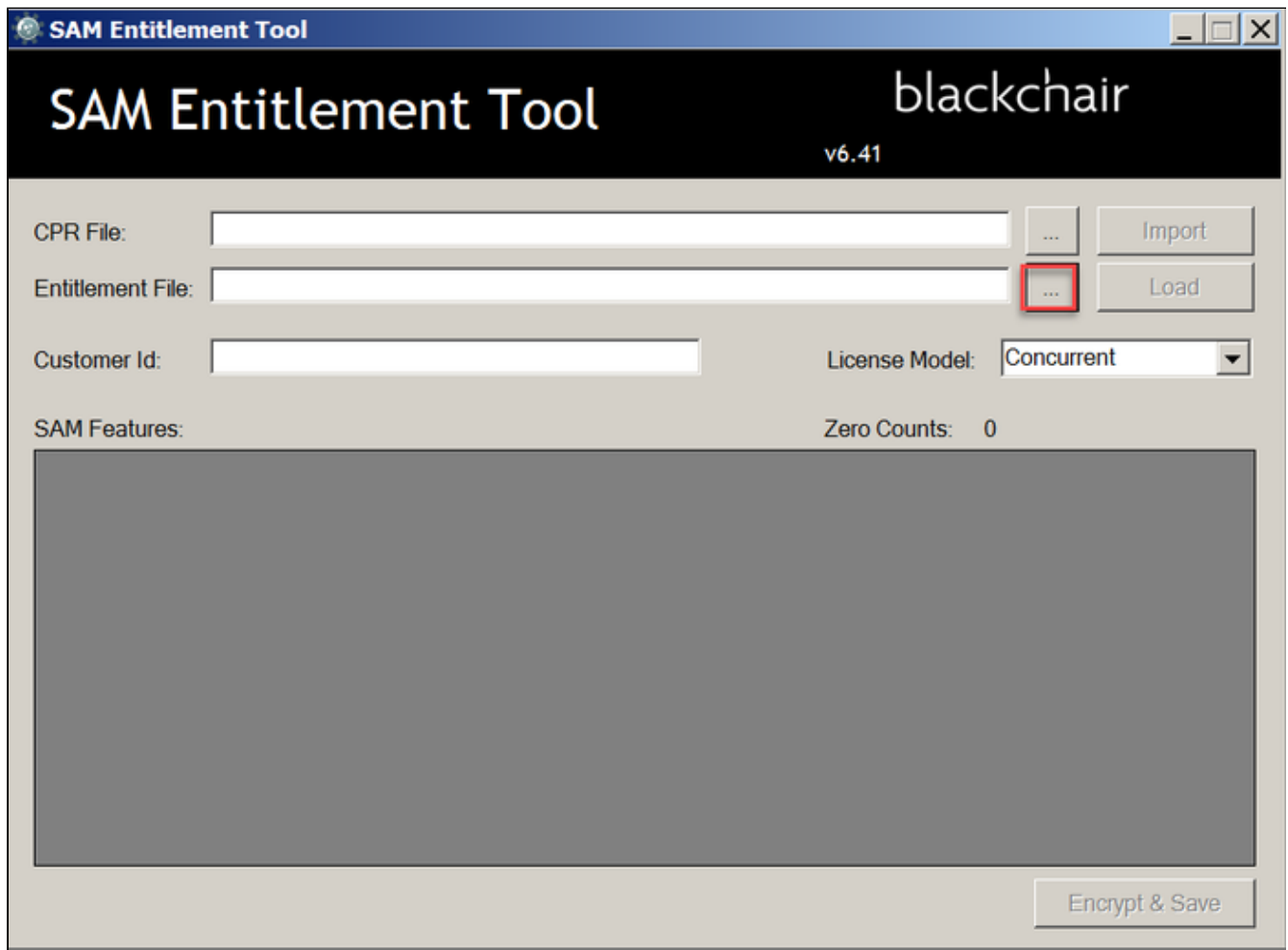


- Select **OK** at the confirmation message

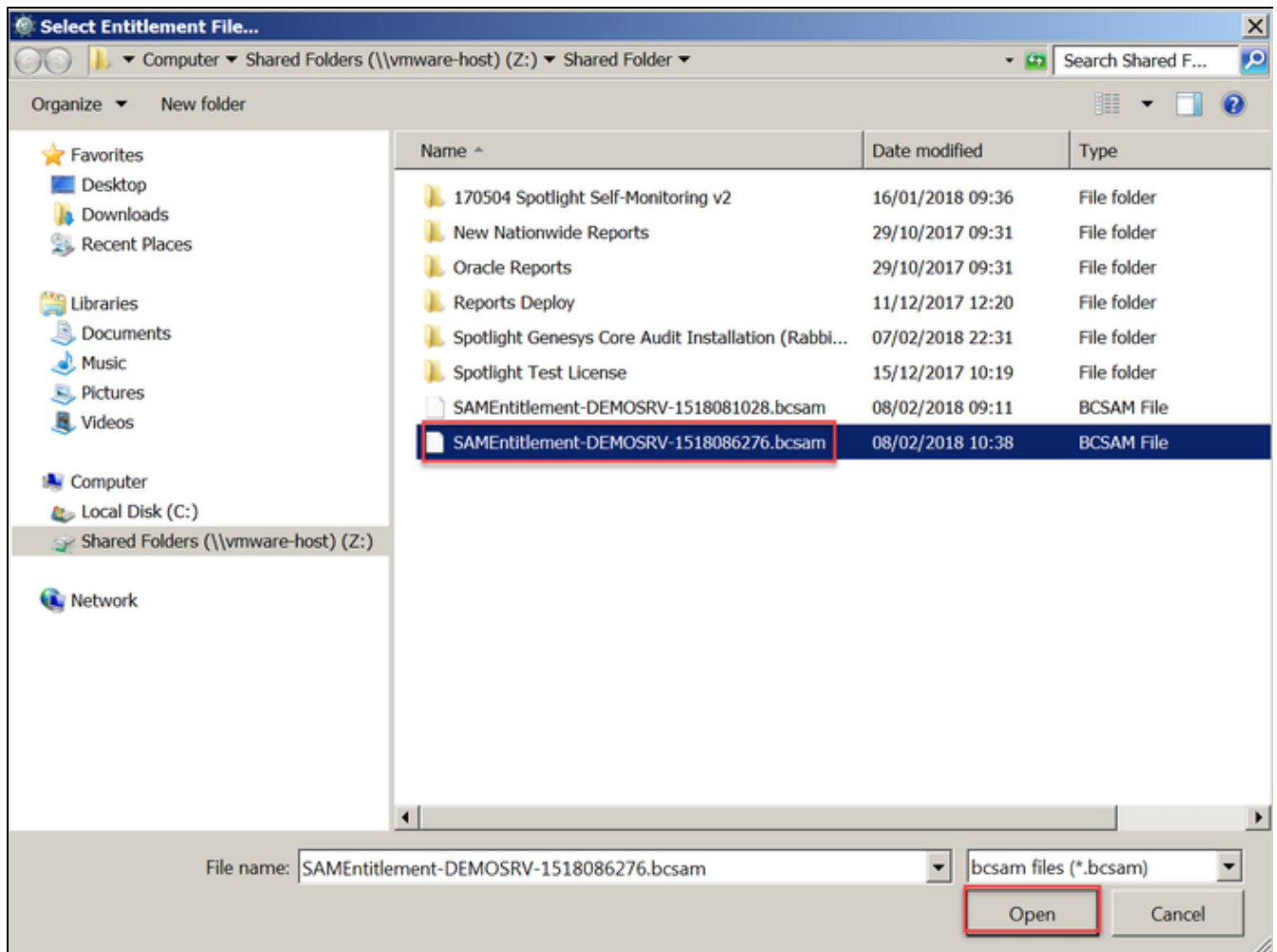


The SAM Entitlement Tool can also be used to adjust a current Entitlement File (BCSAM). To do so:

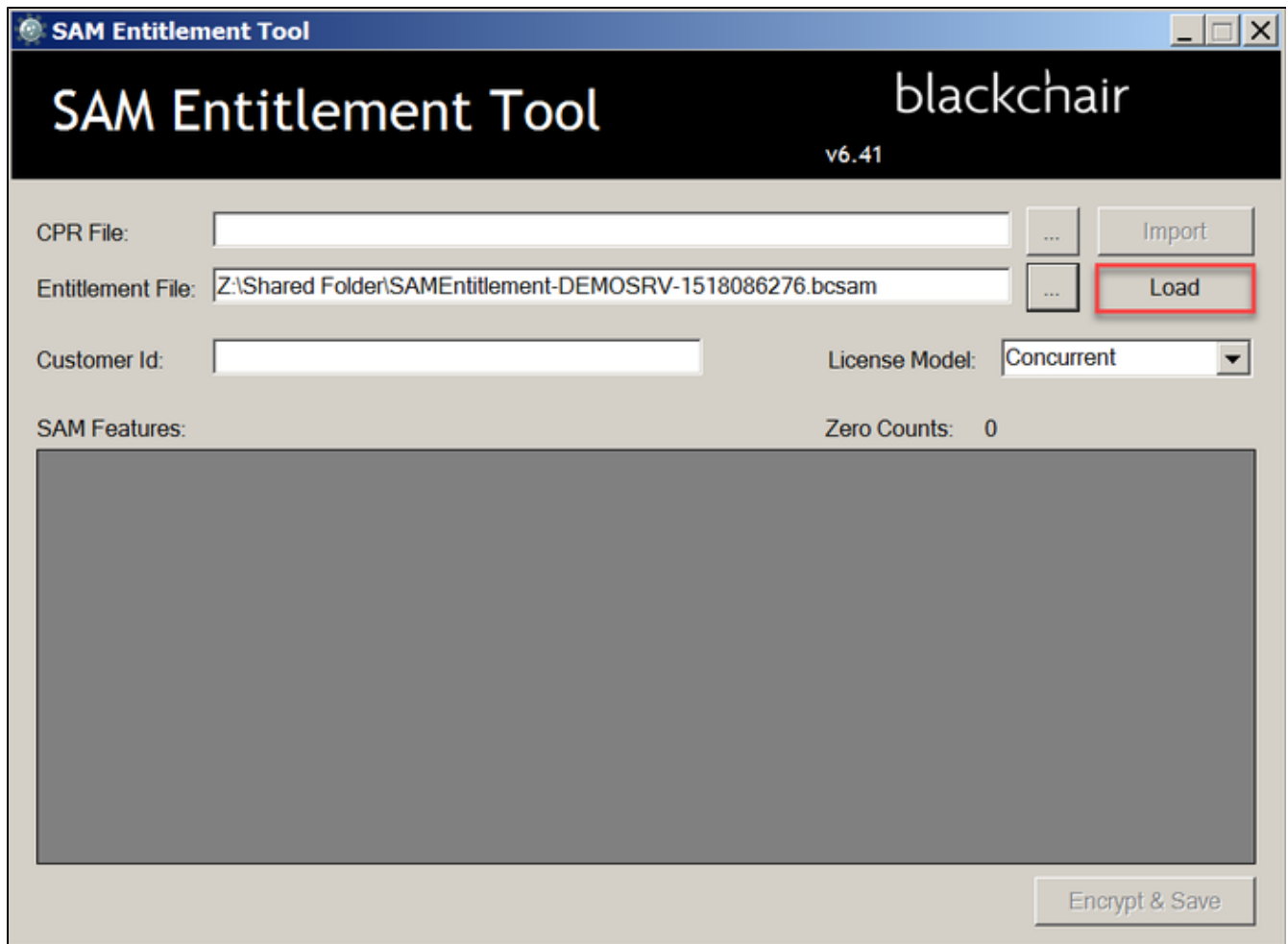
- Select the **Entitlement File Browse ...** button



- Locate the **BCSAM** file
- Select **Open**



- Select Load



- For each SAM feature, adjust the "Total Count", by manually entering a new value as required
- Select **Encrypt & Save**

SAM Entitlement Tool

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CPR File:
...
Import

Entitlement File:
...
Load

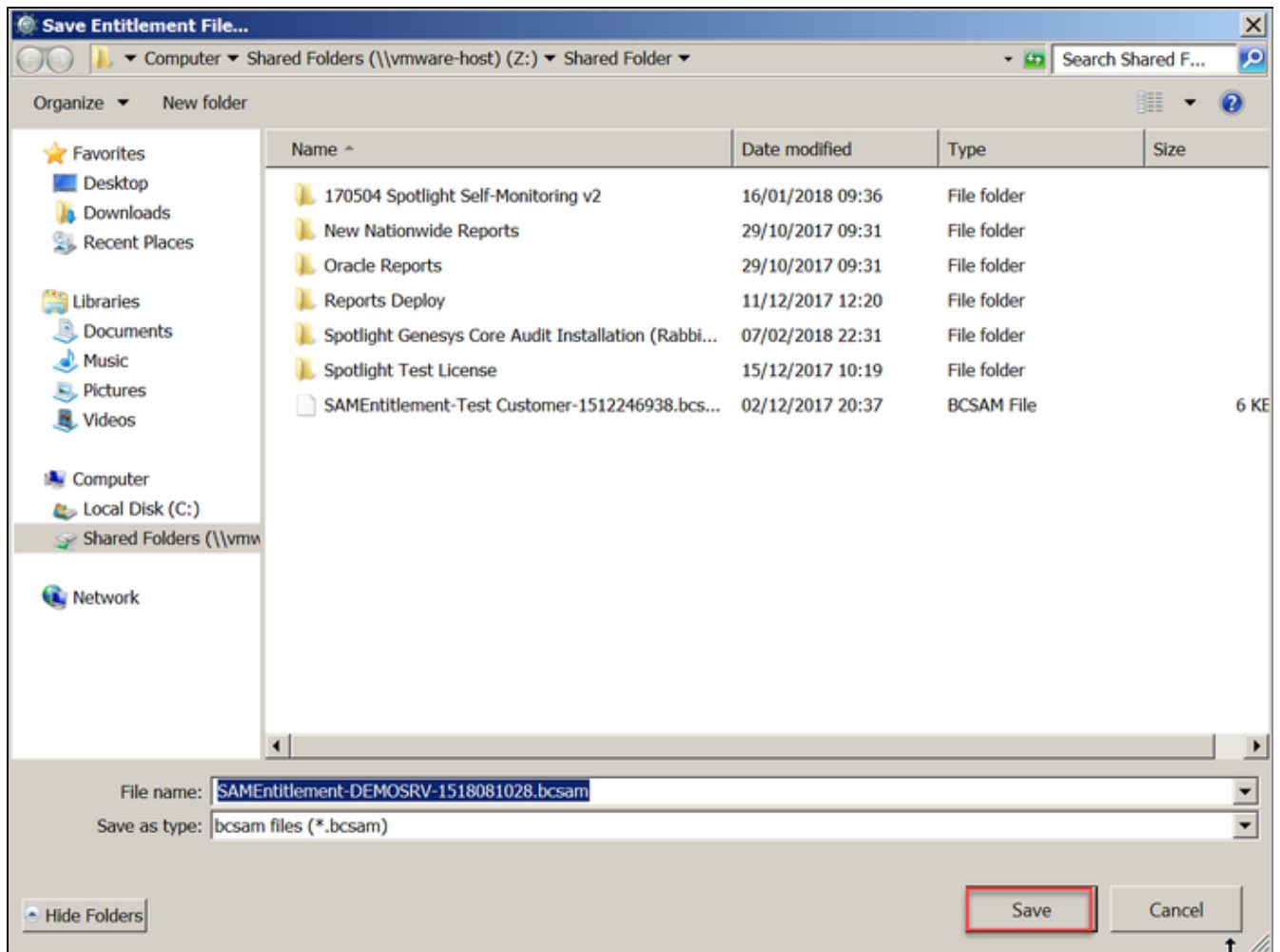
Customer Id:
License Model:

SAM Features:
Zero Counts: 18

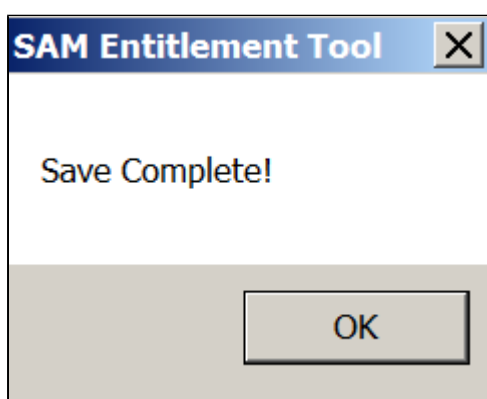
SAM Feature	Total Count
AgentConnector	0
ASRPortsGVP	0
CIMPlatform	8925
FrameworkStandaloneCTI	0
GenesysAgentDesktop	10
GenesysChatWebMedia	333
GenesysEmail	333
GenesysInfoMart	8949
GenesysInteractiveInsights	8925

Encrypt & Save

- Specify the location to save the **BCSAM** file
- Select **Save**



- Select **OK** at the confirmation message



SAM Additional Env KVs

When SAM is configured, using the Configuration tool as described below, a **SLS.properties** file is configured which amongst other

properties lists the name of the StatServer which will be used by SAM.

When Spotlight connects to this StatServer on its default port and retrieves its configuration, including backup application details. We also have the option in Spotlight to override this data, by specifying alternative configuration using a series of entries in the slconfig EnvironmentKV table as follows :

- ENV_SS_NAME_SAM - Name of primary statserver
- ENV_SS_HOST_SAM - Host name of statserver
- ENV_SS_PORT_SAM - Port used to connect to statserver
- ENV_SS_TLS_SAM - True if statserver port if secure\TLS
- ENV_SS_NAME_BACKUP_SAM - Name of backup statserver
- ENV_SS_HOST_BACKUP_SAM - Host name of backup statserver
- ENV_SS_PORT_BACKUP_SAM - Port used to connect to backup statserver
- ENV_SS_TLS_BACKUP_SAM - True if backup statserver port if secure\TLS

NB: Only add the values that are to be used

SAM Configuration Tool

The '**SAM Configuration Tool**' is designed so that each section can be configured individually, except for the '**Environment**' section which will need to be correctly configured each time.

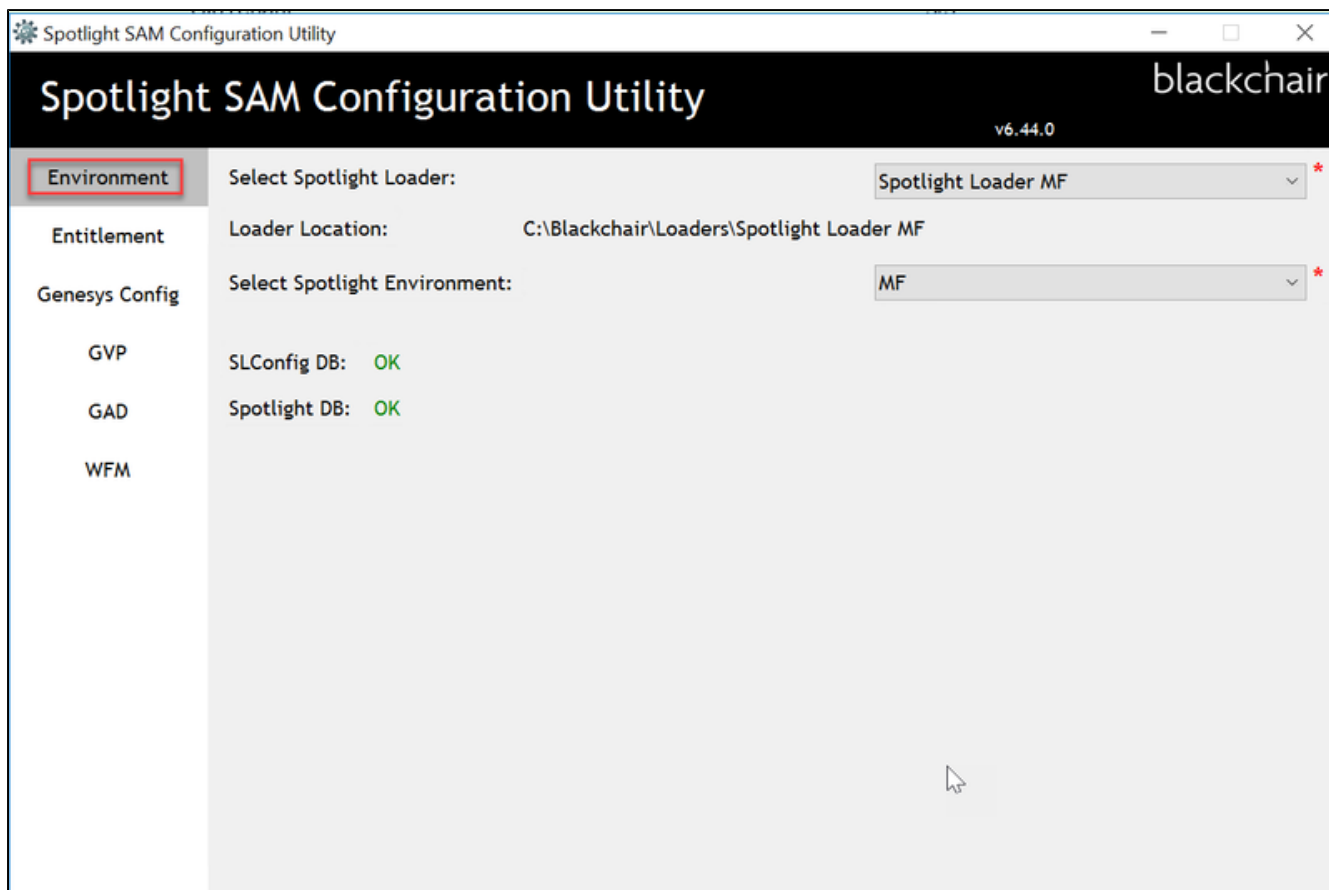
Locate and open the '**SAM Configuration Utility**' folder and right click on the '**SAMConfigurationUtility.exe**' file and click on '**Run as Administrator**' to start the '**SAM Configuration Tool**'.

NOTE: If there is a file called '**samconfigurationutility.log**' located in the '**SAM Configuration Utility**' folder then this should be deleted or renamed before starting the '**SAM Configuration Tool**' so a fresh log is produced.

Environment

This section needs to be configured every time the '**SAM Configuration Tool**' is used.

- In the '**Environment**' section, select the '**Spotlight Loader**' from the '**Select Spotlight Loader**' drop down, for the environment SAM is being configured on.
- In the '**Select Spotlight Environment**' drop down select the corresponding environment name for the selected Spotlight loader.
- If the connections to the '**SLConfig DB**' and '**Spotlight DB**' are correct then '**OK**' will be displayed in green next to each. If this does not happen then this issue must be resolved before moving forward; please contact blackchair support for assistance.



Entitlement

This section needs to be configured whenever there is a new entitlement file available.

- In the '**Entitlement**' section, click the '**Browse**' button.

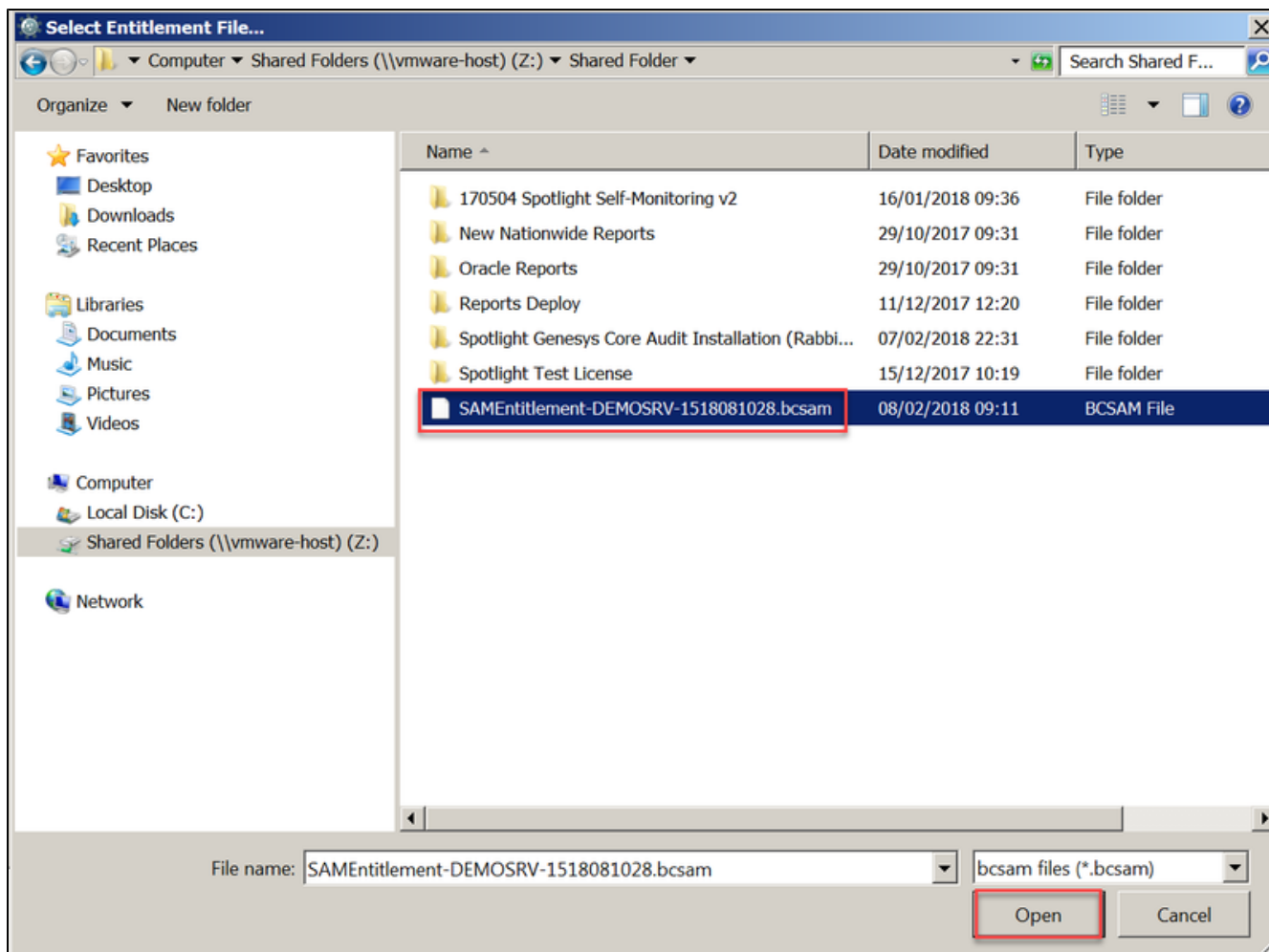
Spotlight SAM Configuration Utility

blackchair

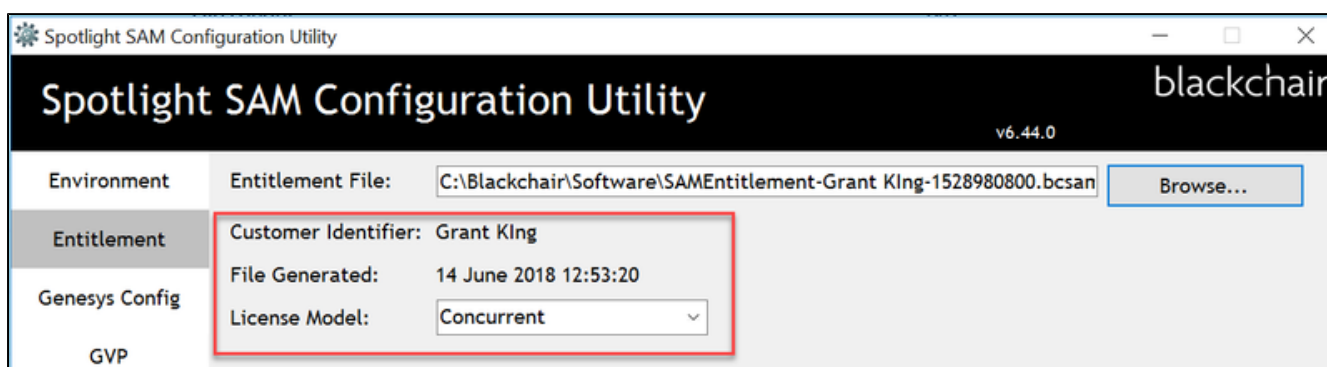
v6.44.0

Environment	Entitlement File: <input type="text"/>	Browse...
Entitlement	Customer Identifier: Please browse for Entitlement file	
Genesys Config	File Generated:	
GVP	License Model: Concurrent	
GAD	SMTP (Host:Port):	
WFM	SMTP Username:	
	SMTP Password:	
	From Address:	
	To Address:	
	Frequency:	
	Entitlement File:	
	SMTP Details:	Save Entitlement

- Locate and select the provided encrypted '**BCSAM**' entitlement file and click the '**Open**' button.



- The 'Entitlement' section of the tool will refresh and display the 'Customer Identifier' and 'File Generated' day, date and time that the file was created.
- Check that the correct 'License Model' has been automatically selected, if it is not correct change it from the drop down menu.



- The 'SMTP' section shown below is in preparation for a future release and is not currently used; you do not need to complete details.
- Lastly click on the 'Save Entitlement' button.

- The 'Entitlement section will refresh and display 'OK' in green for the 'Entitlement File' and 'SMTP Details' to confirm that these details have been saved correctly.

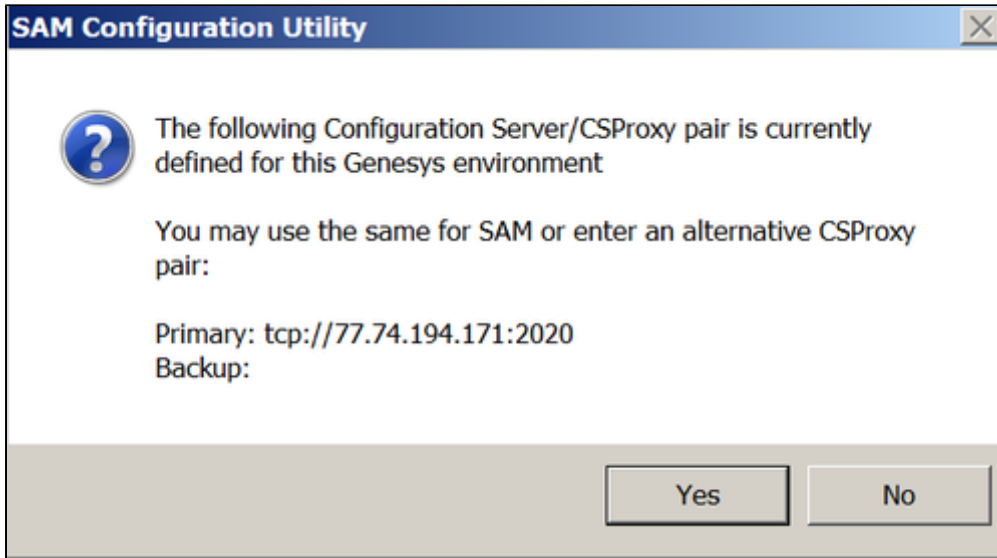
When the entitlement file has been saved only the applicable license types for that customer will be available to be configured, all other sections in the SAM Configuration tool will be greyed out.

Genesys Configuration

This section needs to be configured whenever any of the details, such as the 'Genesys CME User Account', 'Genesys CME User Account Password' or 'Primary Stat Server Name' change.

- When the **Genesys Config** section is first accessed, a message will be displayed indicating the details of the **Config Server/Proxy** being used by **Spotlight Audit**
- **SAM** should only connect to the main Config Server as connecting to a Proxy can cause issues with performance
- Select **Yes** to use this same information for **SAM** if Spotlight Audit is connecting to the Config Server or **No**, to enter alternative data

if it is connecting to a Proxy



- If **No** was selected, enter the **Primary** and **Backup Config Server Host** and **Port** information
- If Genesys is **TLS** enabled, select the check box

The screenshot shows the "Spotlight SAM Configuration Utility" application window. The title bar includes the application name and version "v6.44.0". The "blackchair" logo is in the top right corner. On the left, there is a sidebar with a tree view containing "Environment", "Entitlement", "Genesys Config" (which is selected and highlighted with a red box), "GVP", "GAD", and "WFM". The main area displays configuration fields for "Genesys Config". A red box highlights the "Primary Config Server / CS Proxy" and "Backup Config Server / CS Proxy" fields, which both contain the IP address "192.168.188.40". The "Primary Config Server / CS Proxy Port" and "Backup Config Server / CS Proxy Port" fields both contain the port number "2020". Other fields include "App Name used by Configuration Manager" (default), "Genesys Config Server TLS enabled?" (checkbox), "Enter the user account to access Genesys:" (default), "Enter the password to access Genesys:" (password), "Enter the Primary Stat Server name:" (Stat_Server), and "Enter Tenant(s) to be monitored (comma separated):" (Environment). At the bottom right, there are two buttons: "Verify & Save Credentials" and "Start Statserver Loader & Initialise Groups".

- Enter the '**user account**' and '**password**' provided to access the Genesys CME
- Enter the name of the '**Stat Server**' that will write the '**login**' information to Spotlight database.
- Enter the Tenants to be monitored (comms separate dvalues)
- Then click the '**Verify & Save Credentials**' button.

Spotlight SAM Configuration Utility v6.44.0 blackchair

Environment	Primary Config Server / CS Proxy:	192.168.188.40
Entitlement	Primary Config Server / CS Proxy Port:	2020
Genesys Config	Backup Config Server / CS Proxy:	192.168.188.40
GVP	Backup Config Server / CS Proxy Port:	2020
GAD	App Name used by Configuration Manager:	default
WFM	Genesys Config Server TLS enabled?	<input type="checkbox"/>
	Enter the user account to access Genesys:	default
	Enter the password to access Genesys:	password
	Enter the Primary Stat Server name:	Stat_Server
	Enter Tenant(s) to be monitored (comma separated):	Environment

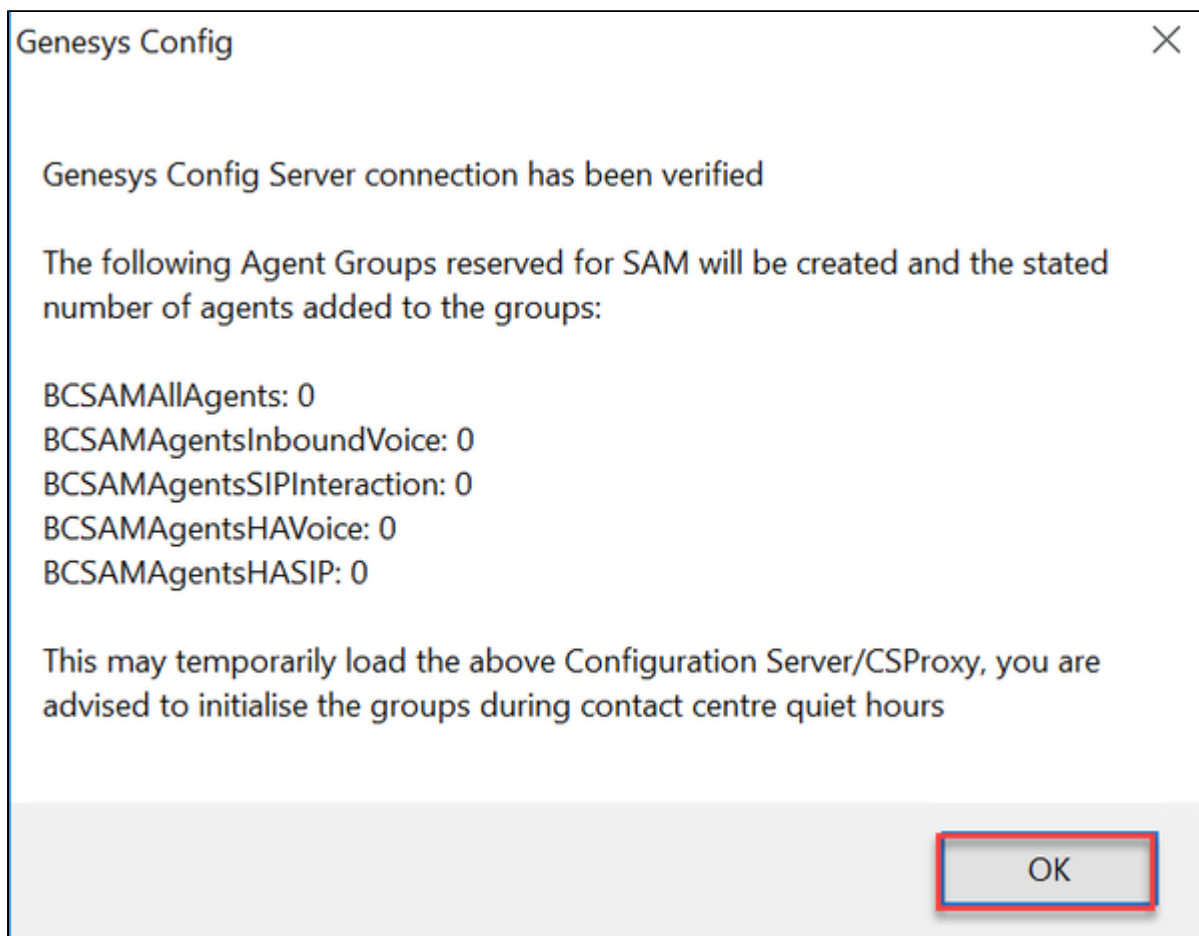
Verify & Save Credentials

Start Statserver Loader & Initialise Groups

- If any data cannot be verified, an error message will be displayed indicating where the issue may be.



- Correct and verify
- When all data is verified, you will receive a message window indicating that the connection to the '**Genesys Config Server**' has been verified, and lists the **SAM Agent Groups** that will be created in Genesys once the **Spotlight Loader Statserver** is started (see below)
- Select **OK**



- Once 'Genesys Config Server' connection has been verified the '**Spotlight Loader Statserver ...**' service for the production environment that SAM is configured. If the **GVP**, **GAD** and/or **WFM** tabs in the SAM Configuration Utility require to be configured, this loader should not be started until that configuration is complete

NOTE : when the '**Spotlight Loader Statserver ...**' service runs for the first time following configuration it will perform the following configuration actions:

- Create the **SpotlightAssetMgmt** folder
- Create the reserved Agent Groups (see Section 4 for more information)
- Add the current population of agents into the appropriate Agent Groups

These actions occur when the "**Spotlight Statserver Loader ...**" service is started. The third action may generate a large number of changes to Agent Group membership, depending on the size of your contact centre configuration.

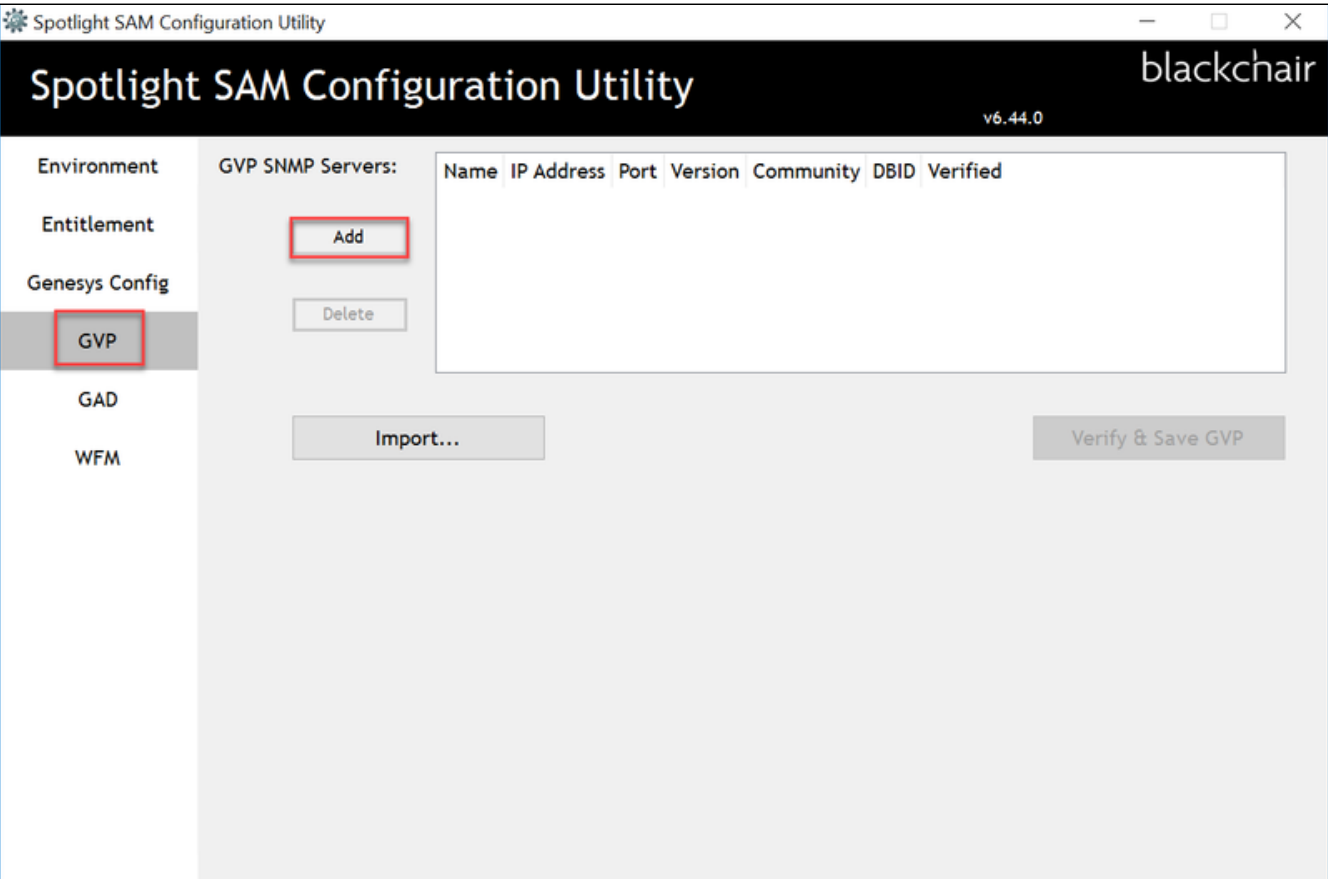
NB - THESE CHANGES ARE DRIPPED FED TO GENESYS AND THEREFORE MAY TAKE A NUMBER OF HOURS UNTIL LICENSE TRACKING IS FULLY ENABLED

After this initialisation Agent Group membership is only updated individually when an agent is added or deleted in the Genesys configuration and the level of change is consequently low.

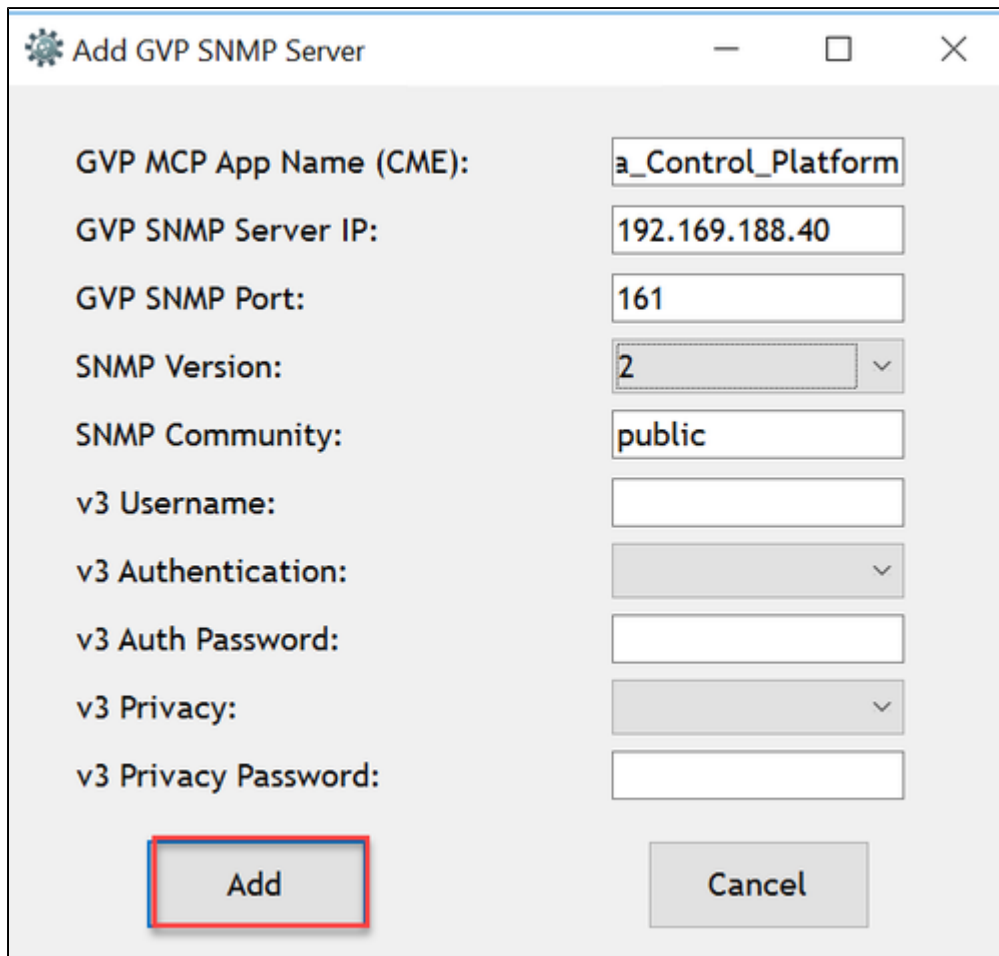
GVP

This section needs to be configured whenever there is a new 'GVP' to be added or the connection details to an existing 'GVP' changes.

- In the 'GVP' section, click on the 'Add' button to enter the connection details for a 'GVP'.



- In the 'Add GVP SNMP Server' window, enter the 'GVP' information provided by the customer and then click on the 'Add' button.

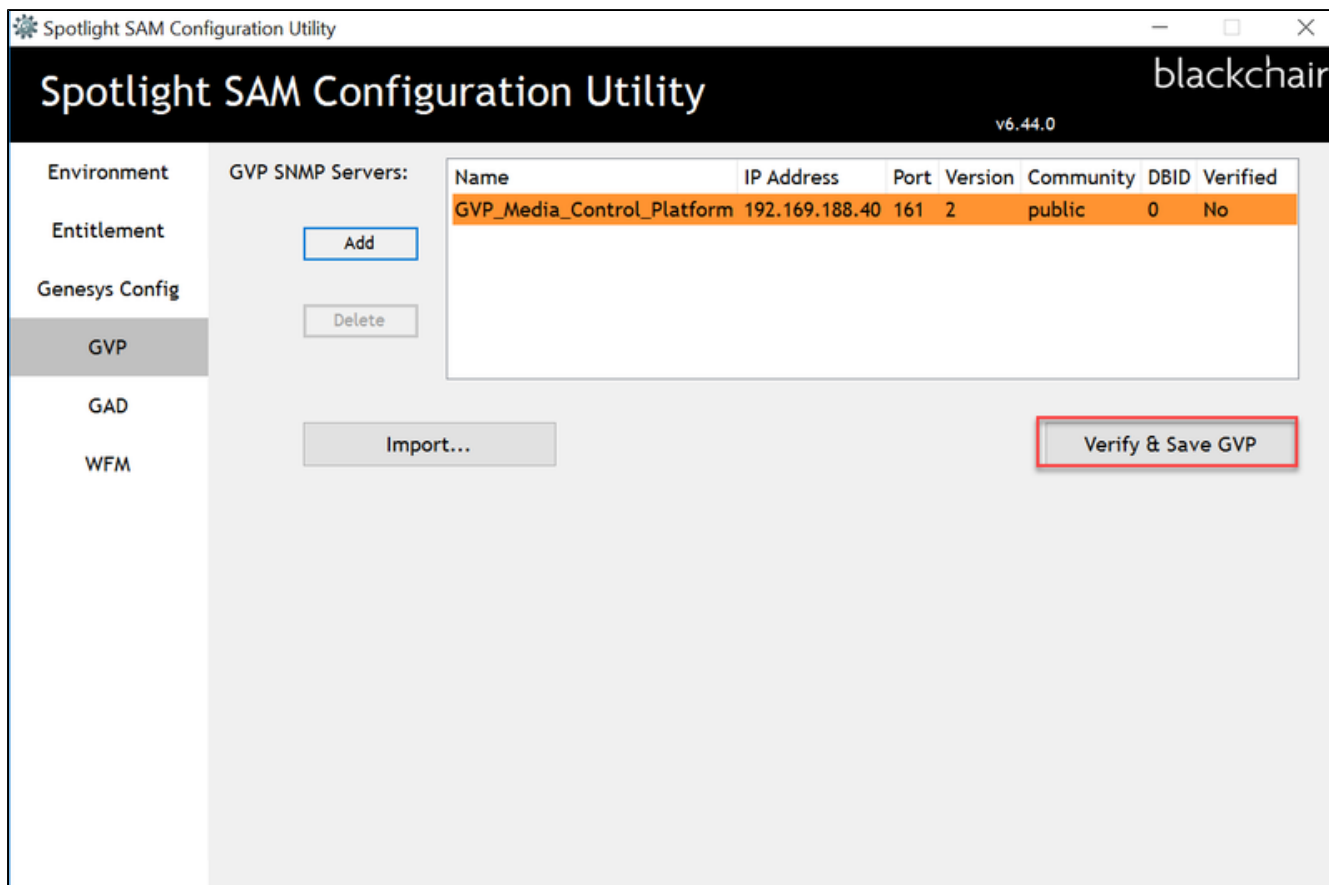


The image shows a dialog box titled "Add GVP SNMP Server". It contains several input fields for configuring an SNMP server. The fields are: "GVP MCP App Name (CME):" with the value "a_Control_Platform"; "GVP SNMP Server IP:" with the value "192.169.188.40"; "GVP SNMP Port:" with the value "161"; "SNMP Version:" with a dropdown menu showing "2"; "SNMP Community:" with the value "public"; "v3 Username:" with an empty text box; "v3 Authentication:" with a dropdown menu; "v3 Auth Password:" with an empty text box; "v3 Privacy:" with a dropdown menu; and "v3 Privacy Password:" with an empty text box. At the bottom, there are two buttons: "Add" and "Cancel". The "Add" button is highlighted with a red border.

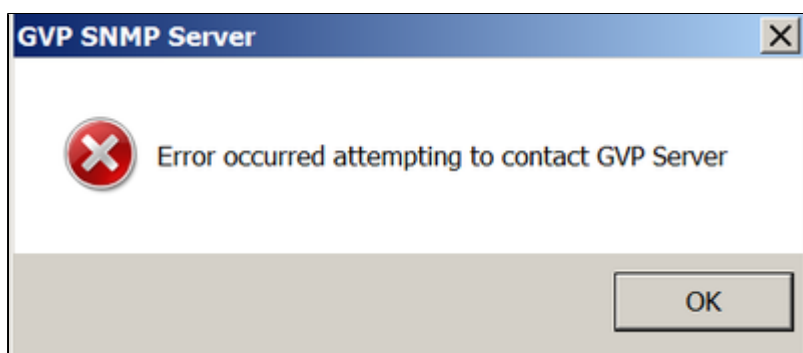
GVP MCP App Name (CME):	a_Control_Platform
GVP SNMP Server IP:	192.169.188.40
GVP SNMP Port:	161
SNMP Version:	2
SNMP Community:	public
v3 Username:	
v3 Authentication:	
v3 Auth Password:	
v3 Privacy:	
v3 Privacy Password:	

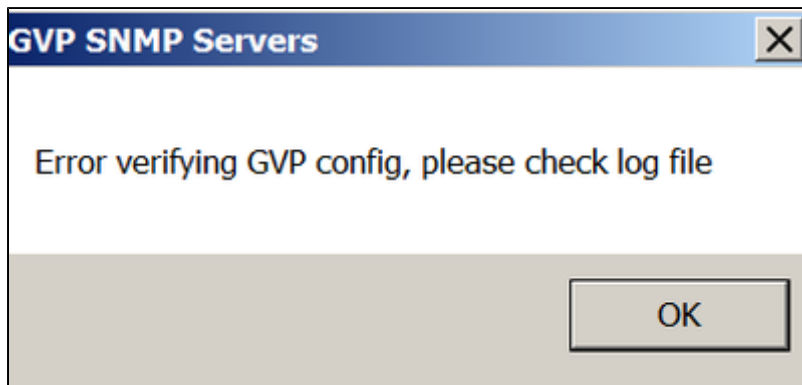
Add **Cancel**

- If there is more than one 'GVP' server, repeat the process as described above for each of the 'GVP' servers.
- Click the 'Verify & Save GVP' button to verify and save the 'GVP' connection details



- If the information provided is incorrect, or there is some other issue, the configuration utility cannot make a connection to the 'GVP' server, you may receive an error message

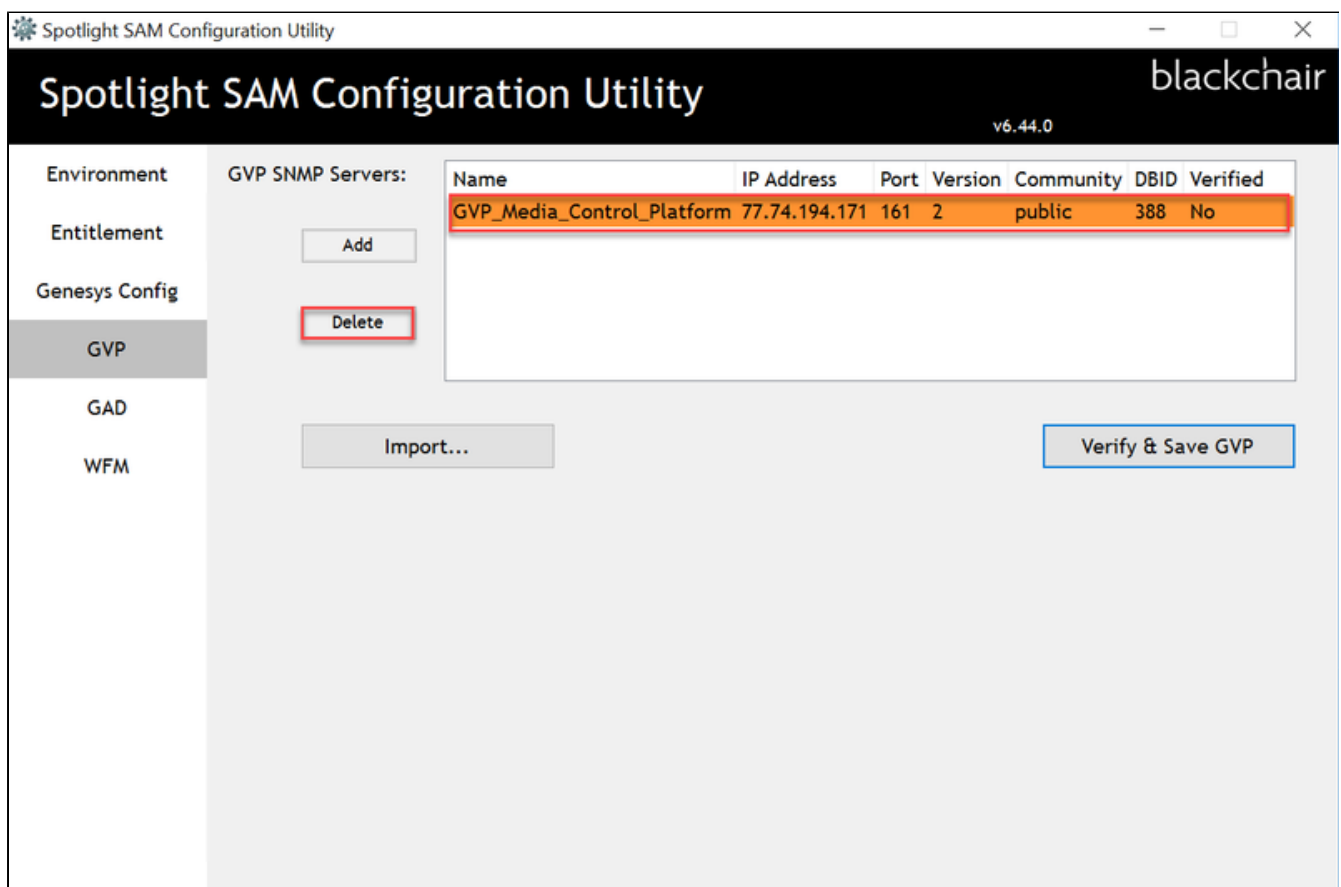




- The '**GVP**' data entered will appear with an amber background. This issue must be resolved before the '**GVP**' can be verified and saved.
- If the information provided is correct and the configuration utility can make a connection to the '**GVP**' server, the '**GVP**' data entered will appear with a green background.

To remove a GVP SNMP Server from the configured list:

- Select the item to be removed
- Select **Delete**



An alternative to entering GVP details manually, is to create a CSV file and import the data. To do so

- Create a CSV file with one column for each data type, as can be seen in the screen shot below
- Populate the CSV file with GVP data and then save

Add GVP SNMP Server

GVP MCP App Name (CME):

GVP SNMP Server IP:

GVP SNMP Port:

SNMP Version:

SNMP Community:

v3 Username:

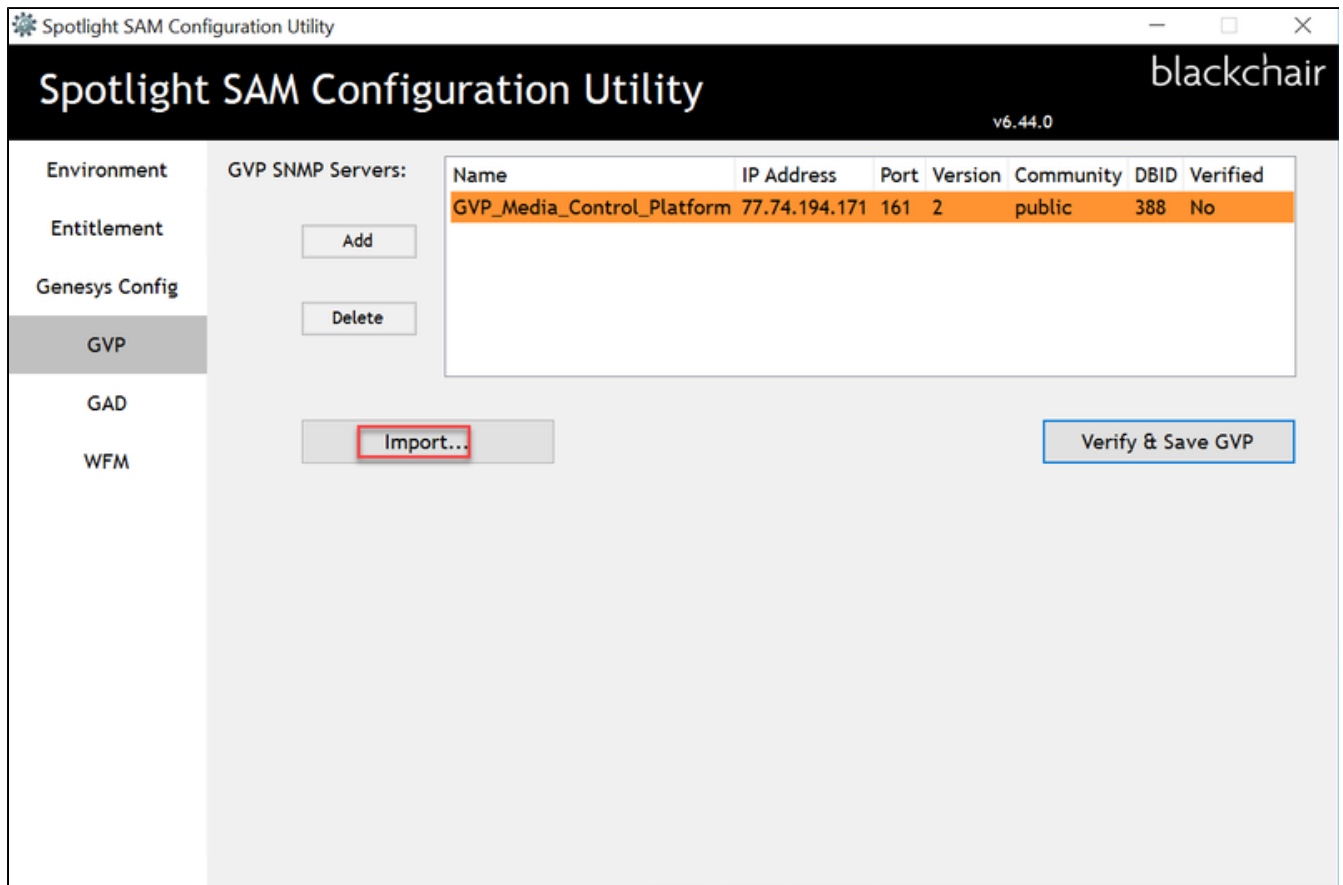
v3 Authentication:

v3 Auth Password:

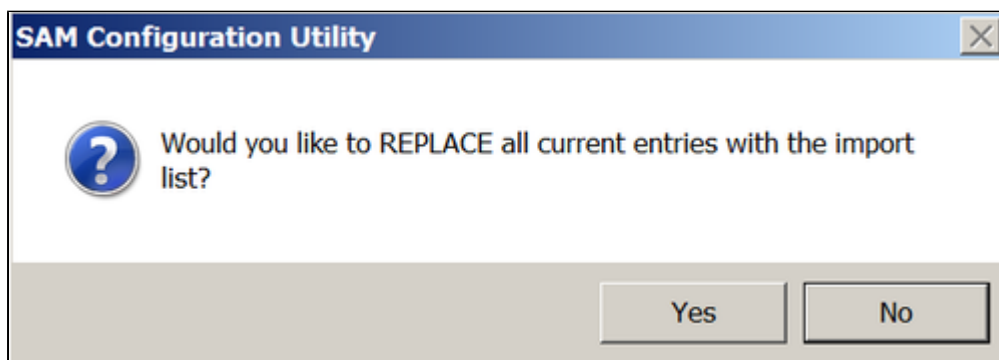
v3 Privacy:

v3 Privacy Password:

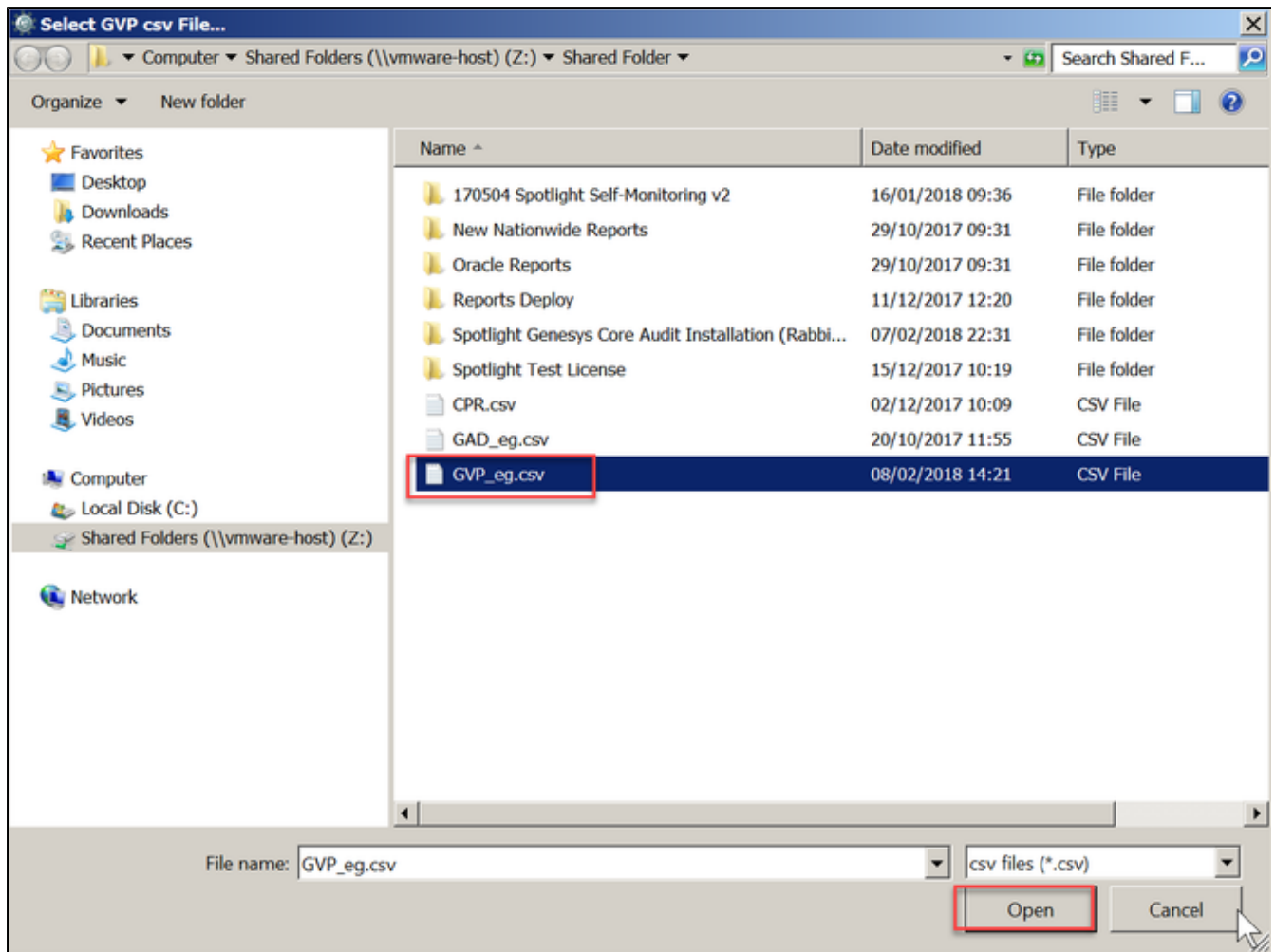
- In the GVP tab select **Import**



- Select Yes to replace all currently configured GVPs
- Select No if you wish to add to the current list



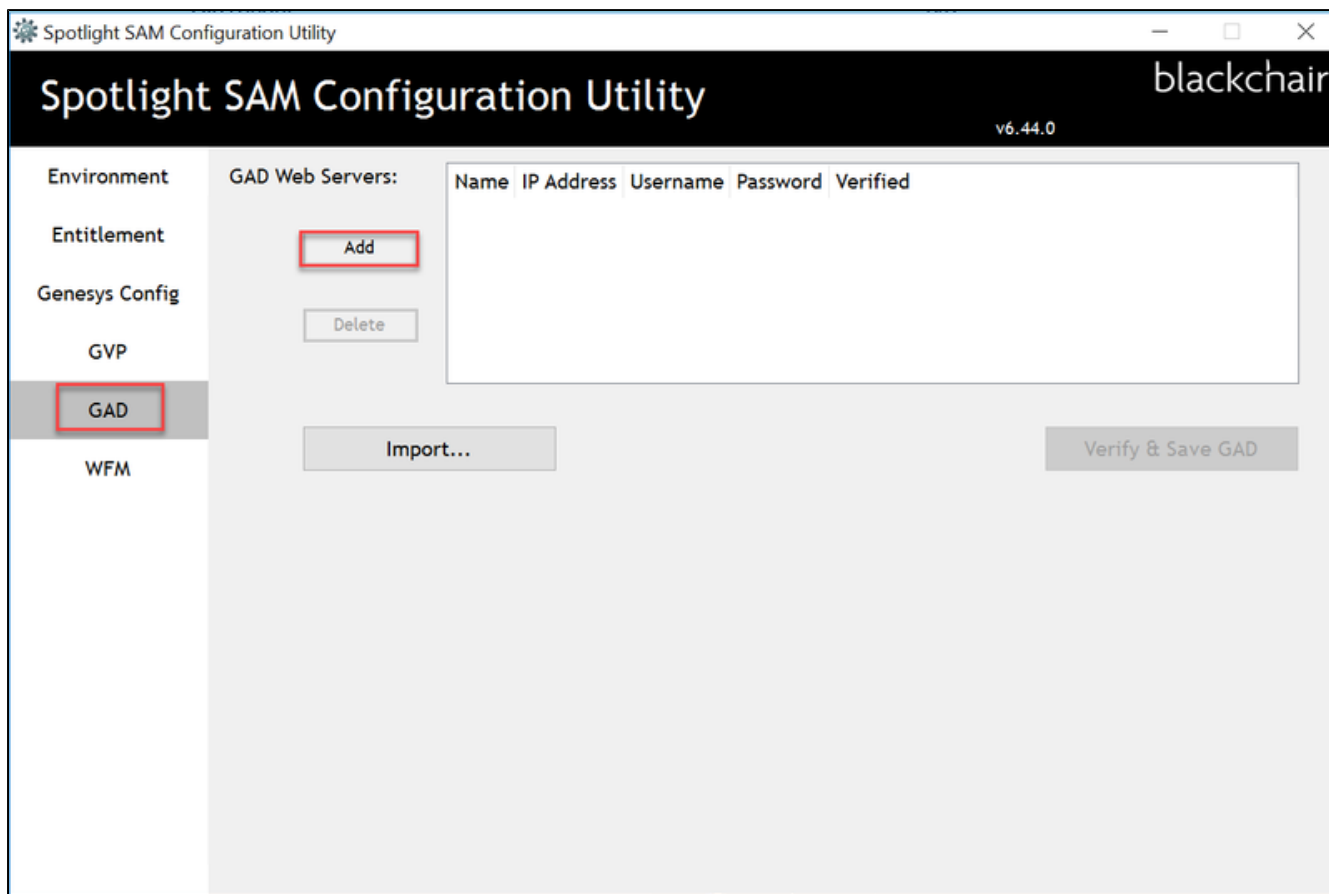
- Locate the CSV file
- Select **Open**



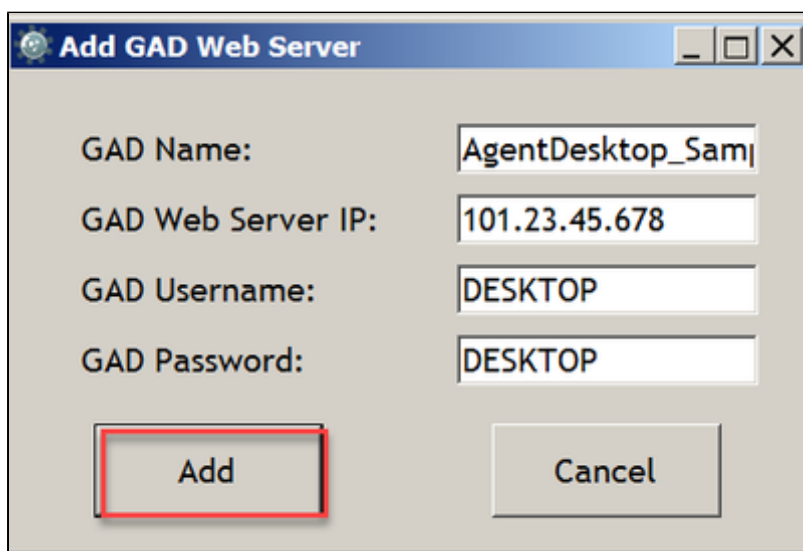
- The GVP data will be imported

GAD

- To add a connection to a GAD web server, in the **GAD** tab, first select the "Add" button.



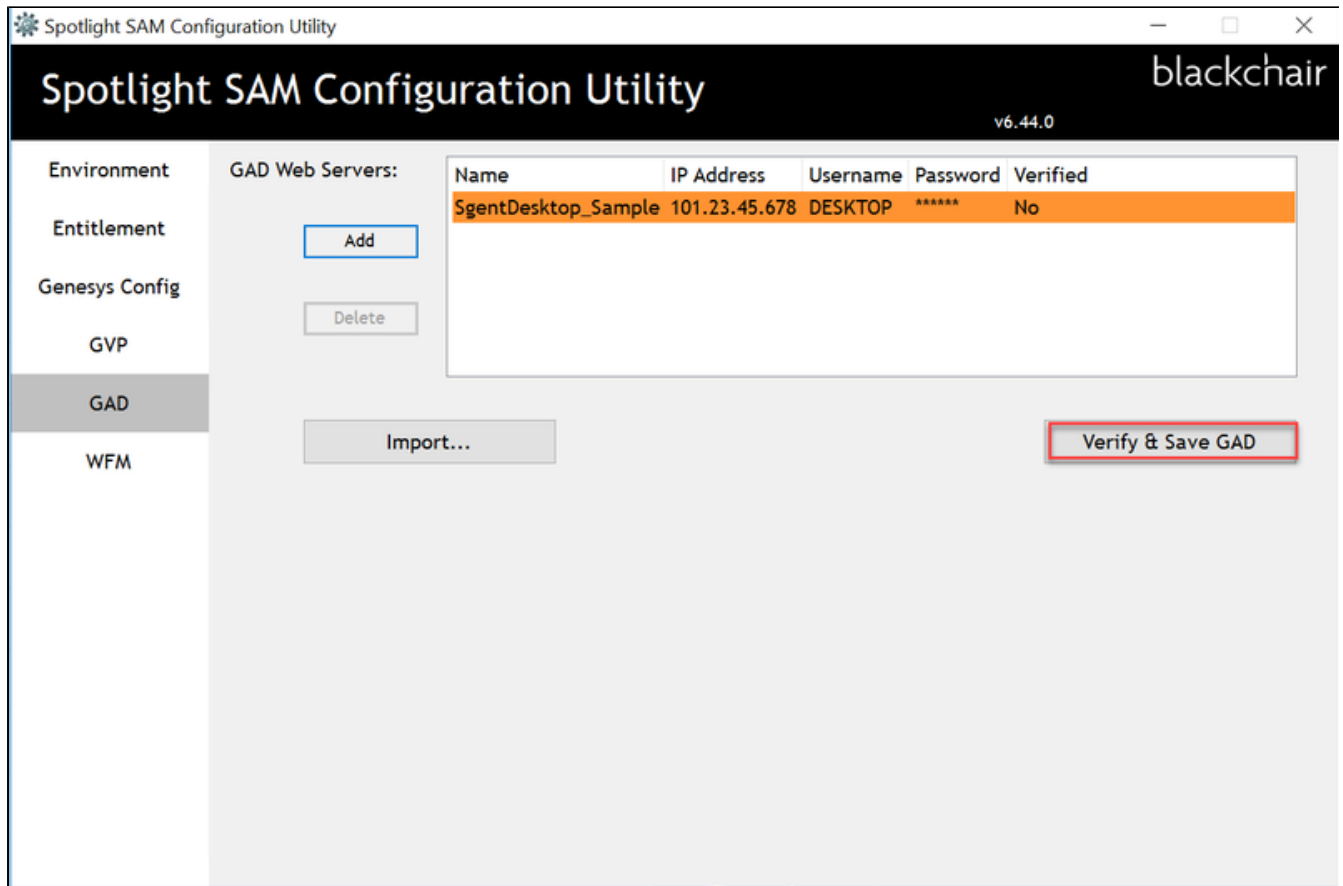
- Enter the GAD information provided by the customer and then select "**Add**".



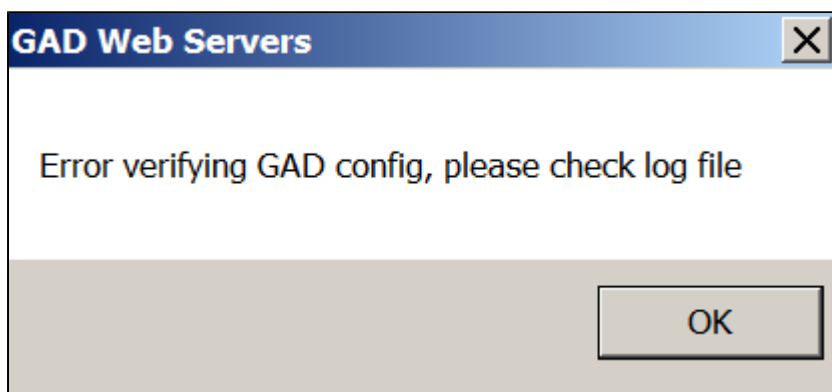
NB: GAD Username and GAD Password provided must have administrative access to GAD

- Select **Verify & Save GAD**
- If the information provided is correct, and the configuration utility can make a connection to the GAD web server, the data will appear

with a green background.



- If there are issues with the data, it will appear with an amber background and an error message will be displayed



- If there is more than one GAD web server, repeat the process described above.
- When the data is correct, select "**Verify & Save GAD**".

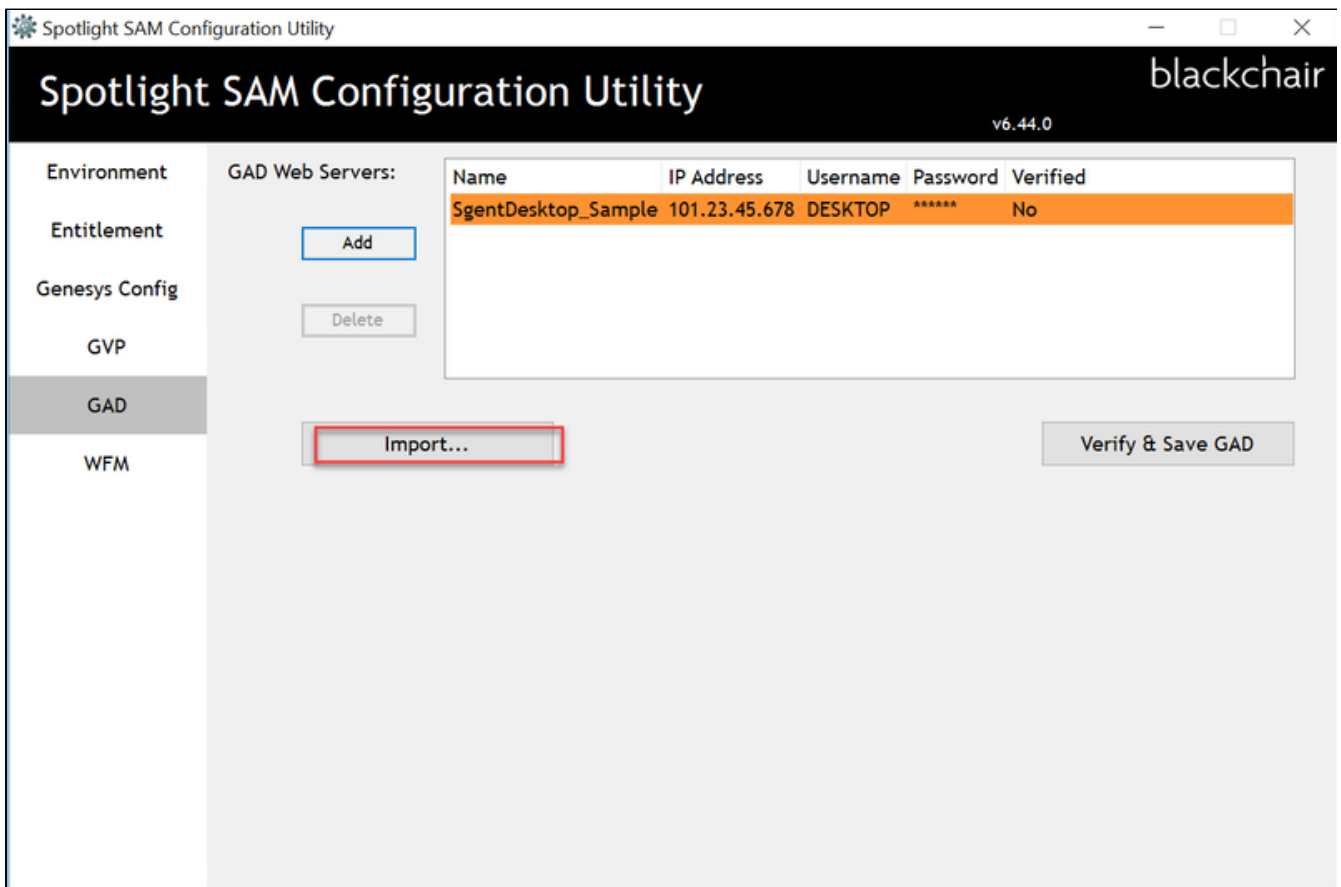
An alternative to entering GAD details manually, is to create a CSV file and import the data. To do so

- Create a CSV file with one column for each data type, as can be seen in the screen shot below
- Populate the CSV file with GAD data and then save



A dialog box titled "Add GAD Web Server" with a blue header bar. It contains four text input fields labeled "GAD Name:", "GAD Web Server IP:", "GAD Username:", and "GAD Password:". Below the fields are two buttons: "Add" and "Cancel".

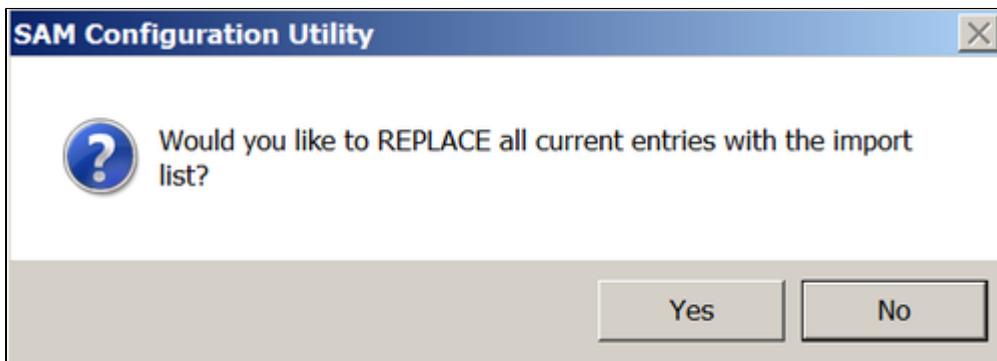
- In the GAD tab select **Import**



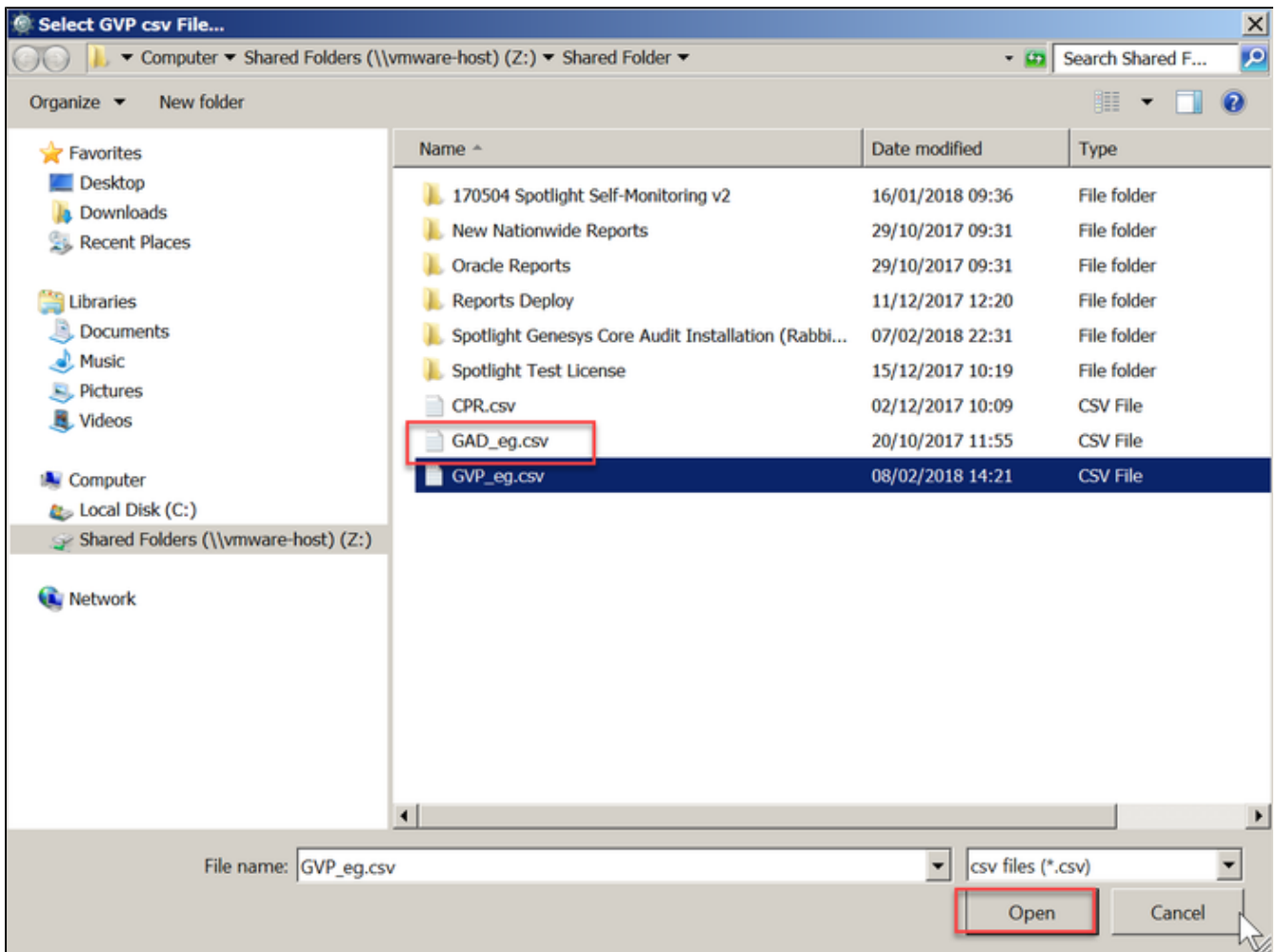
The main window of the "Spotlight SAM Configuration Utility" (version 6.44.0) by blackchair. The left sidebar shows a navigation menu with "GAD" selected. The main area displays "GAD Web Servers:" with a table containing one entry: "SgentDesktop_Sample" with IP "101.23.45.678", Username "DESKTOP", Password "*****", and Verified status "No". Below the table are "Add" and "Delete" buttons. At the bottom, the "Import..." button is highlighted with a red rectangle. A "Verify & Save GAD" button is also present.

Name	IP Address	Username	Password	Verified
SgentDesktop_Sample	101.23.45.678	DESKTOP	*****	No

- Select Yes to replace all currently configured GVPs
- Select No if you wish to add to the current list



- Locate the CSV file
- Select **Open**



- The GAD data will be imported

WFM

- In the **WFM** tab, enter the database details provided by the customer, and then select "**Verify & Save**".

Spotlight SAM Configuration Utility v6.44.0 blackchair

Environment: Is the Genesys WFM database on Oracle or SQL Server?

Entitlement: Enter the name of the database server hosting WFM database including instance:

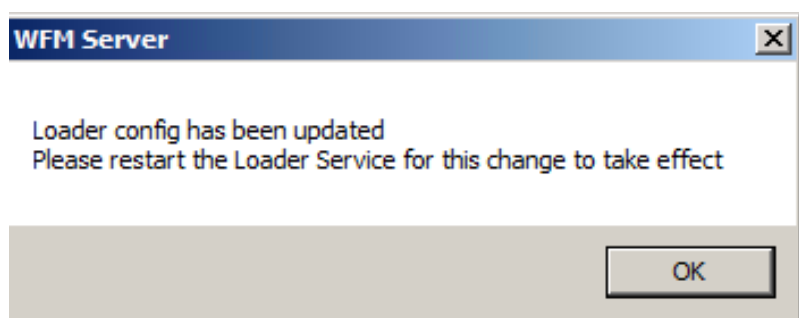
Genesys Config: Enter the name of the WFM database:

GVP: Enter the account to access the WFM database:

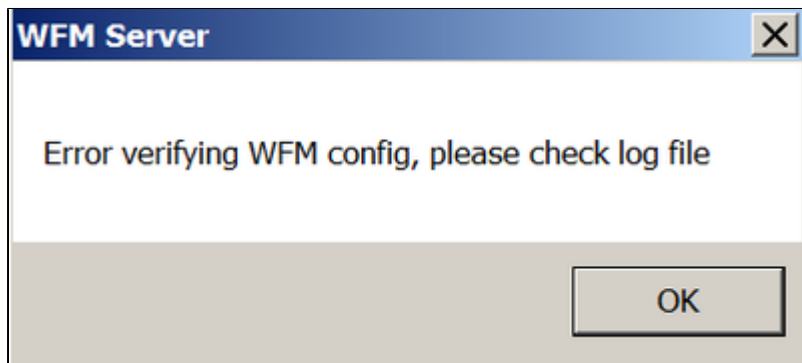
GAD: Enter the password to access the WFM database:

WFM **Verify & Save WFM**

- You will receive a confirmation message indicating that the Spotlight Loader has been updated to include a connection to WFM. This change will only take effect when the loader has been restarted. Select "**OK**".



- If there has been an issue connecting to WFM, an error message will be displayed.



- Check the SAM log for further information to assist.
- Once you have adjusted the provided data, select **Verify & Save** again

SAM Agent Group Pacing

- SLS will now use a default 1 per 500ms trickle save rate when making changes to Agent Groups
- The default trickle rate can be overridden by using additional sls.properties keys as follows -
 - **TrickleRateNum**
 - **TrickleRateTime**
- These trickle rate values are dynamic and do not require SLS to be restarted

For example if you wanted 10 changes every 1 second then use **TrickleRateNum=10** and **TrickleRateTime=1000**.

- In addition, SLS will now write its current status to the Spotlight DB **SystemOption** table, **OptionName** = "**SLStatus**", possible values are:
 - "Initialising"
 - "Checking SAM Agent Groups"
 - "Saving SAM Agent Group: x"
 - "Monitoring Stats".

Enable License Report Permissions

Once SAM has been configured, users require to be given the correct permissions in Spotlight to be able to run the report. To do this:

- Restart **IIS**
- Access the Spotlight UI
- Navigate to the **Admin** tab
- Select **Users**
- Select the **Environment Name**
- Select a **User**
- Under **Spotlight Permissions**, select the check box - **License Reporting**

blackchair

DASHBOARD

CONFIGURATION

REPORTING

SECURITY AUDIT

OPTIONS

ADMIN

Spotlight Configuration Management

Licensed to: TEST

Time Zone: GMT Standard Time

Logged in as: WIN-SORLFGNQXW\Administrator V6.4

Environments

Users

Languages

Environment	Name	Login	Email	Administrator?
DEMOSSV	Spotlight Loader	SpotlightLoader		<input type="checkbox"/>
	Administrator	WIN-SORLFGNQXW\Administrator	gking111275@gmail.com	<input checked="" type="checkbox"/>

Spotlight Permissions

☒ View Configuration

☒ Configuration Package Execute

☒ Baseline Management

☐ License Reporting

Data Permissions

Item Type	Allow?
Action Code	<input checked="" type="checkbox"/>
Alarm Condition	<input checked="" type="checkbox"/>
App Template	<input checked="" type="checkbox"/>
Application	<input checked="" type="checkbox"/>
Business Attribute	<input checked="" type="checkbox"/>
Calling List	<input checked="" type="checkbox"/>
Campaign	<input checked="" type="checkbox"/>
Field	<input checked="" type="checkbox"/>
Filter	<input checked="" type="checkbox"/>
Folder	<input checked="" type="checkbox"/>
Format	<input checked="" type="checkbox"/>

Testing

Most of the feature usage calculations are aggregated daily, usually at 01:00. The usage report can therefore only be requested for a time range up to yesterday. Data for the day you configure SAM is incomplete. Therefore you need to wait two days before you can fully check the report.

Advanced SAM

Advanced SAM refers to the ability to create License Groups. From **Spotlight v6.44**, this feature is enabled by default

For further information on how to configure **License Groups**, please refer to the [Spotlight Admin Guide](#)

Troubleshooting

Use the link below to access a DEV troubleshooting guide for SAM

[SAM Guide](#)