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Performance Management Advisors Deployment Guide

Deploying SDS and RMC


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Deploying SDS and RMC

Use the information on this page to deploy the Resource Management Console and the Supervisor Desktop Service (required for RMC).

Roadmap

1. **[+] Install the databases that correspond to the Advisors products you will deploy.**
 - a. Advisors Genesys Adapter metrics database
 - b. Advisors Platform database
 - c. Advisors Cisco Adapter database (if you use ACA)
 - d. Metric Graphing database
2. Create the Advisors User and the Object Configuration User in Configuration Server.
3. **[+] Install the Platform service (Geronimo) on all servers on which you will deploy one of the Advisors components.**
 - Contact Center Advisor
 - Workforce Advisor
 - Frontline Advisor
 - Contact Center Advisor-Mobile Edition
 - Resource Management Console
4. Install each adapter you will use (AGA and ACA).
5. Install the Advisors components for your enterprise:
 - Contact Center Advisor
 - Workforce Advisor

- Contact Center Advisor – Mobile Edition
 - Frontline Advisor
 -  SDS and Resource Management
6. Make any required configuration changes.

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Supervisor Desktop Service=

Important

- Supervisor Desktop Service (SDS) requires a 32-bit Java installation (JVM). SDS will run on a 64-bit operating system, including both Windows 2008 and Windows 2003 Server, but attempting to run the SDS startup executable against 64-bit Java causes it to immediately shut down. SDS can be started and run from its batch file using 64-bit Java, but this requires a session to be always open on its server and is therefore not recommended. Java 32-bit can be run on 64-bit Windows operating systems.
- Performance Management Advisors support Oracle JDK 1.7, but SDS does not. If you deploy SDS with Advisors Release 8.1.401 or later, and you have Java 7 installed, you must also install a version of JDK 1.6.0 for SDS.
- Install SDS and the Resource Management Console (RMC) only after you have installed all other Advisors components that you use in your enterprise. Genesys recommends that you verify the dashboards are working for all installed components (CCAdv, WA, FA), and that the hierarchy in each dashboard rolls up correctly before you install SDS and RMC. After you have verified Advisors is working correctly, install JDK 1.6 (if it is not already installed as your primary JDK version), and then install SDS and RMC.

1. If an older version of SDS is already installed, you must uninstall it.

[+] Show More

- a. Shut down the SDS service.
- b. In a command prompt, navigate to the bin subdirectory for the SDS installation.
- c. Run `service.bat uninstall SupervisorDesktopService`.
- d. Delete all files and subdirectories in the root SDS directory.

2. Ensure that you have either a `JAVA_HOME` or `JRE_HOME` environment variable set, pointing to the JDK or JRE root directory respectively.

3. Choose a location on the server, and unzip the Supervisor Desktop Service zip file.

4. On the Genesys server, launch the Configuration Manager and configure the SDS application.

[+] Show Steps

- a. Open the Hosts folder under the Environment tenant. Create a host object for the machine on which you will deploy the SDS, if one does not already exist.
Genesys recommends that the IP address configured in this host object be the actual IP address of the server, not a loopback address.
- b. Open the Application Templates folder. Import the application template called `Genesys_Supervisor_Desktop_Service_763.adp`. This template is located with the SDS installation files.
- c. Open the Applications folder. Right-click in the pane on the right and select `New > Application`.
- d. Select the `Genesys_Supervisor_Desktop_Service_763.adp` application template and a new window should open showing the application.
 - i. On the General tab, set the name of the application to `Genesys Supervisor Desktop`.
 - ii. (Multi-tenant environments only) On the Tenants tab, add the non-Environment tenant that SDS will monitor.
 - iii. On the Server Info tab, select the host object configured in the step above (that is, the server that the SDS is going to be deployed on). If necessary, change the port number to 8080.
 - iv. On the Start Info tab, enter a single period (.) for the working directory, command line, and command line arguments.
 - v. On the Options tab:
 - Under the License section, change the value for license-file to the port and host name of the server hosting the license server. This value should be in the format `Port@Hostname` (for example, `7260@inf-devlab`).
 - Specify the following options under the supervisor section:
 - `set calculated-statistics-enable to true`
 - `set stat-on-request to true`
 - `set stat-threads to -1`
 - `set stat-peeking to false`
 - `set show-env-tenant to false` for multi-tenant configurations, or to `true` for single-tenant configurations

The following setting:

`stat-threads= -1`

can be used to indicate “use all available processors”.

For smaller customers the following settings:

`stat-peeking=false`

`stat-refresh-rate=30`

can be used to create periodic SDS statistics polling at 30-second intervals.

The refresh rate can be increased for more frequent updates, at the cost of increased SDS and Stat Server load.

For larger customers the following setting:

`stat-peeking=true`

can be used to define on-demand statistics retrieval.

- vi. On the Connections tab, add connections to the T-Servers, Interaction Servers, and the Stat Server to which the SDS will connect.
SDS can be connected to one primary/backup Stat Server pair.
- vii. Save the application.
- e. Open the SDS application properties again.
- f. Open the Security tab. In the Log On As section, select the This Account option, and set the value to default or set it to the name or any other account that has full control privileges.
- g. Go to the Options tab and double-click the Supervisor option. Add the properties for your e-mail messaging system; see the following Table for additional information.

Property Name	Example Property Value	Description
email-sender-address	<adminaccount@email-server.com>	The From address used for all Resource Management notification e-mail messages.
email-server	<email-server@domainname.com>	The mail server name.
email-server-port	25	The default SMTP port.
email-user	sds.email.account	The user account for the e-mail server. Ignored if email-authenticate is set to off.
email-authenticate		Does the e-mail server require authentication? Valid values are on or off.
email-use-SSL		Does the e-mail server use SSL? Valid values are on or off.
password		The password for the e-mail server. Ignored if email-authenticate is set to off.

- h. Verify that the T-Server(s), Interaction Server(s), and Stat Server(s) are configured with a correct host (that is, they do not use localhost).
The SDS uses the hosts that are configured in the Configuration Server for the T-Servers, Interaction Servers, and the Stat Servers to determine where they are installed and how to reach them. If these servers are configured with the localhost host, the SDS tries to connect to the server on which it is installed. This will not work if the SDS and the other servers are installed on different machines.
- i. If not already done, create a new person in your SDS-monitored tenant. (For single-tenant installations, create the person in the Environment tenant.) Leave the password fields blank and ensure that the IsAgent checkbox is selected. The person object should have the following attributes:
 - First Name: Spv
 - Last Name: Spv_Last
 - Employee ID: Spv
 - User Name: Spv
- j. Open the Annex tab, and add a new section named security. Open this section and add the following

properties:

- Supervisor = 1
- SupervisorAdhoc = 2
- SupervisorExtended = 10
- SupervisorMonitoring = 1

k. Save the user.

l. Open the user properties again. Open the Security tab. In the Permissions pop-up, add the default user to the list and select Full Control as the type of access (if this does not already exist). Click OK and save the user.

m. Add permissions as follows:

- For single tenant installations, add Spv to the Administrators group for the Environment tenant:
 - Under AccessGroups, select Administrators, then right-click.
 - Select New > Shortcut to Person. Locate and add Spv.
- To enable agent maintenance for multiple tenant installations, you must give the Spv user the same subset of permissions that are given to tenant Administrators. You must also give the Spv user Change permission to Person objects (to manage agent skills). You might want to create a separate access group for the Spv user that contains these required permissions. If you do not wish to create a separate access group, add the Spv user to the existing tenant's Administrators Access Group, and grant the group Change permission to Person objects.

5. In the folder containing the Supervisor Desktop Service installation package, run setup.exe. The Genesys Installation Wizard for SDS displays and guides you through the rest of the installation.

[+] Show Steps

- On the **Connection Parameters to the Configuration Server** screen, enter information in all fields.
- On the **Select Application** screen, select the application that you created using Configuration Manager (at Step 4 in this procedure).
- On the **Choose Destination** screen, specify the directory in which to install SDS. Clicking the Default button enters C:\GCTI\GenesysSupervisorDesktopService\Genesys_Supervisor_Desktop. Click the Browse button to navigate to a directory of your choice.

Important

The Supervisor Desktop Service (SDS) installation path must contain no spaces. For example, C:\Advisors\SDS\ADV_Supervisor_Desk_Serv is a valid installation path, but C:\Advisors\SDS\ADV Supervisor Desk Serv is not.

- To configure a connection to a backup Configuration Server, enter the connection parameters on the **Connection Parameters to the Backup Configuration Server** screen. This is optional; you can leave this screen empty.
- On the **Configuration Parameters** screen, enter the Tomcat port information.



6. In the Configuration Manager, edit the options for your Stat Server application:

- a. Import the `StatServerEntries.cfg` file (found in the Advisors Genesys Adapter installation directory) into the Stat Server application options. When prompted to overwrite the existing options, choose NO.
- b. If prompted to overwrite/update any statistics options, do this. The file does not alter any default Stat Server metrics, only ones specific to Advisors. Changing any logging options is optional.
- c. Restart the Stat Server.

7. In the Configuration Manager, browse to the scripts for the tenant(s) that you use for the SDS installation. In a pre-7.6 Configuration Manager installation, these would appear under `Resources/Scripts`. In a 7.6+ Configuration Manager installation, these would appear under `Tenant/Scripts`.

Delete all scripts named `User Stat.Spv*`.

8. Restart any Stat Server to which you added the `StatServerEntries.cfg` file.

9. On the server containing your SDS service, navigate to the `bin` directory, and edit the `GDesktopStarter.ini` batch file. Find the line starting with `echo JavaArgs:`

- Change the value of `-Xms` to 512.
- Change the value of `-Xmx` to 1024.
- Append the following to the end of the line – the following options improve performance of the SDS:
`-XX:+UseConcMarkSweepGC`
- If SDS is being installed in a multiprocessor environment, add the following to the end of the line:
`-XX:+UseParNewGC`

10. Open the Windows services control panel, and start the new Genesys Supervisor Desktop Service.

|–| Resource Management Console=

1. Launch the AGA installation file.

[+] Show Steps for Linux

- a. As root, navigate to the Advisors home directory:

```
cd /home/advisors
```

- b. As root, run the AGA installer. The page format of this document might cause a line break in the following command, but you must enter it on one line in the command prompt window:

```
./jdk1.7.0_<version>/bin/java -jar aga-installer-<version>.jar
```

[+] Show Steps for Windows

Do one of the following:

- Open a command line window, and enter the following command:

```
java -jar aga-installer-<version>.jar
```

- Double-click the aga-installer-<version>.jar file in the release bundle.

Double-clicking might not work due to system settings, but using the command line terminal should always work. Genesys recommends using the command line window to launch the installer.

For 64-bit systems, if double-clicking to launch the installer, please ensure that the Java instance associated with the jar file type is 64-bit. Running the installer with a 32-bit Java instance will create a Windows service with the wrong executable.

2. On the **Install Type** screen, select the Deploy Resource Management Console radio button. You can install only a single component (either the core service or RMC) during a single installer run.

3. On the **Database Type** screen, select either the SQL Server or the Oracle option – whichever you use for Advisors platform database(s). The screens that follow are dependent on your selection:

[+] Show Step for SQL Server

- a. Select the base location of the Advisors installation (that is, the base directory where the Platform components and Geronimo are installed). In most cases, this is C:\Program Files\GCTI\Advisors.
- b. On the **Genesys Advisor Platform Database** screen, specify the parameters for the Advisors platform database:
 - Database server—The host name or IP address of the database server. When using numerical IPv6 addresses, enclose the literal in brackets.
 - Database port number—The database server's port number.
 - Database name—The unique name of the database instance.
 - Database user—The username to be used by the Adapter to access the database.
 - Database user password—The password associated with the database user.

[+] Show Steps for Oracle

- a. On the **Oracle setup type** screen, select the Basic option.
- b. Select the base location of the Advisors installation (that is, the base directory where the Platform components and Geronimo are installed). In most cases, this is C:\Program Files\GCTI\Advisors.
- c. On the **Genesys Advisor Platform Database** screen, specify the parameters for the Advisors platform database:
 - Database server—The host name or IP address of the database server. When using numerical IPv6 addresses, enclose the literal in brackets.
 - Database port number—The database server's port number.
 - Database name—The unique name of the database instance.
 - Database user—The username to be used by the Adapter to access the database.
 - Database user password—The password associated with the database user.

[+] Show Steps for Oracle RAC

- a. On the **Oracle setup type** screen, select the RAC connectivity setup option.
- b. Select the base location of the Advisors installation (that is, the base directory where the Platform components and Geronimo are installed). In most cases, this is C:\Program Files\GCTI\Advisors.
- c. On the **Genesys Advisor Platform Database** screen, specify the parameters for the Advisors platform database:
 - Database user and Database password—The username and corresponding password to be used by the Adapter to access the database.
 - Locate file—Enter the location of the file that contains the advanced database connection string. If you do not know how to correctly build the advanced database connection string, contact your database administrator. The installation wizard applies the specified advanced connection string when configuring the data sources.

4. After installation is complete, click Show Details, and then click Install and verify that there were no errors reported during installation.

5. After RMC has installed successfully, you must edit the RMCInfo.xml configuration file to provide the information required to make Resource Management function and available to Contact Center Advisor. The file is found in the following directory:

```
Advisors\geronimo-tomcat6-minimal-2.1.3\repository\com\informiam\genesys\rmc-web\<version>\rmc-web-8.x.xxx_<version>.war\WEB-INF\classes
```

All SDS-prefixed properties refer to the SDS Service, installed earlier. All CCAAdv/WA-prefixed properties refer to the CCAAdv/WA installation host.

Use the following values:

- SDS_IP – The IP address for the SDS Service host.
- SDS_Port – The port number for the SDS path (default 8080).
- If you are using the Spv user with blank password in the SDS configuration, do not change SDS_DeployPath, SDS_UserName, or SDS_Password. If the user for SDS is not the Spv user with blank password, you must enter that user and password (the SDS_UserName and SDS_Password parameters) in the RMCInfo.xml file. The password must be encrypted. To encrypt the password, use the password encryption utility (see [Change Encrypted Passwords](#)).
- CCAWA_IP – The IP address for the CCAAdv/WA server host. When using numerical IPv6 addresses, enclose the literal in brackets.
- CCAWA_Port – The port number for the CCAAdv/WA server (default 8080).

6. To access the Resource Management Notification administration pages through the Advisors interface (Advisors Administration module), you must add the following entry to the Apache httpd.conf file on the web server:

```
ProxyPass /rmc/ ajp://<rmc host>:<rmc port>/rmc/
```

where <rmc host> is the host name or IP address for the machine on which the RMC module is installed, and where <rmc port> is the corresponding port number (default: 8009).

7. Open the services windows and restart the Geronimo server.