Performance Management Advisors Deployment Guide

Prerequisites

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Prerequisites

Contents

This page provides general information about the Genesys Performance Management Advisors deployment environment. Also in the **Prerequisites** section is information specific to each Performance Management Advisors component. Read all prerequisites relevant to the components you will deploy before you begin installation. There is a list of questions to consider for each component. There are also Tables in which you can input data for your environment. Use the data in these Tables as a reference guide when you deploy each component. The Advisors components are:

- Advisors Platform
- Advisors Genesys Adapter
- Advisors Cisco Adapter
- Contact Center Advisor and Workforce Advisor
- Frontline Advisor and Agent Advisor

Integration with the Genesys Solution Control Server

NEW Starting in release 8.5.1, the following Advisors components are controlled with the Solution Control Server:

- Advisors Genesys Adapter
- Advisors CISCO Adapter
- Contact Center Advisor XML Generator
- Workforce Advisor WA Server
- Frontline Advisor FA Server (that is, FA with the rollup engine)

Integration with the Solution Control Server means you must:

- Install the Local Control Agent (LCA) on each system that runs any of the preceding components. See the Management Framework Deployment Guide for installation of LCA.
- Configure a Host in Configuration Manager or Genesys Administrator for each system that runs any of the preceding components. See Framework 8.1 Configuration Manager Help or Genesys Administrator Extension Help for information.
- Configure an Application in Configuration Manager or Genesys Administrator for each Advisors server that runs one or more of the preceding components. See Framework 8.1 Configuration Manager Help or Genesys Administrator Extension Help for information.

If you are deploying Advisors in a warm standby configuration, you must also configure a second Application for each Advisors component in Genesys Administrator for the secondary server, and associate the two Applications as a primary and backup pair for failover.

After the Advisors components listed above are installed and controlled by the Solution Control Server, you can monitor them using the Solution Control Interface (SCI), Genesys Administrator, or Configuration Manager.

For more details, see Integration with Solution Control Server and Warm Standby and Deploying

Components Controlled by Solution Control Server.

Importance of Advisors Platform

Most Performance Management Advisor applications require the installation of Advisors Platform before installation of the application. The applications rely on Advisors Platform to function. The exceptions to this rule are Contact Center Advisor XML Generator, Advisors Genesys Adapter, and Advisors CISCO Adapter, that do not need the Advisors Platform.

It is very important that you enter complete information on all installation screens when deploying Advisors Platform to ensure correct functionality in the applications.

The Platform installation file installs the following base services:

- Geronimo
- Base web
- Navigation service
- Mail-Delivery service
- Preferences service
- Cache service
- Security Realm
- The data source
- Cluster Manager

Licenses

For information about licenses (for example, you might require a license for High Availability), see the *Genesys Licensing Guide*.

Environmental Requirements

Before you deploy Genesys Performance Management Advisors, ensure you provide – or can provide – the following operating environment.

Networks

Advisors components and all related components (Stat Server, Configuration Server) must be installed on the same network.

Genesys Management Software

You can use Genesys Administrator for much of the post-deployment configuration associated with Genesys Performance Management Advisors, however you also must have access to the Genesys Configuration Manager to perform some of the administrative functions related to Role-Based Access Control (RBAC). You can use Configuration Manager or Genesys Administrator to define and maintain roles, and associate roles with users. This configuration is stored in the Genesys Configuration Server. There are limitations, however, that prevent you from viewing and editing privileges and permissions for Advisors roles; for those tasks, you require Configuration Manager.

Operating systems

You can deploy Performance Management Advisors on Microsoft Windows or, starting in Release 8.5.0, on Red Hat Linux (64-bit applications running on a 64-bit operating system). The installation of the Advisors products on a Red Hat Linux server differs from the installation of those same products on a Windows operating system. See Deploying Advisors for procedures.

For information about operating system versions compatible with your Advisors release, see *Genesys Supported Operating Environment Reference Guide* and *Genesys Interoperability Guide*.

Software

The following external software must be installed on the appropriate physical computer involved in Advisors installation:

- Java Development Kit (JDK)

- Apache HTTP Server
  If the Apache server is installed on the same machine as Advisors Platform, the Apache server must use a port other than 8080 (which is used by Advisors Platform). In most cases, Apache will be able to use port 80.

Client Software

You must install the Flash player plug-in for non-IE browsers (for example, Firefox) on each user's desktop or laptop that runs the Advisors user interface.

Databases

You require the following databases in an Advisors installation, dependent on the Advisors applications you install:

- Advisors Platform database – Required for all applications.

- Advisors Cisco Adapter database – For Cisco installations only.

- Advisors Genesys Adapter metrics database – Required for AGA, CCAdv, and WA.

- Advisors metrics graphing database – Required for Contact Center Advisor and Workforce Advisor. All components of those products require it (Web services and Web server/XML Generator).

In a situation where CCAdv/WA is deployed on one Platform cluster and FA is deployed on another

Platform cluster, Genesys recommends that you use a separate Platform database per cluster; the Platform server clusters should not share a Platform database in this situation.

When the various types of Platform server clusters share one Platform database, those servers are sharing the same Data Manager configuration – especially the Adapter pool configuration that is present in the Platform database – and this can lead to service interruptions when one service is restarted.

If it is absolutely necessary to have the various Platform server clusters for each application share one Platform database, ensure the Administration workbench is installed with only one of the Platform installations. The Advisors Platform installation file gives you the option to install this component. As part of your planning, you should decide on which Platform server you will install the Administration workbench.

You cannot mix database types within an Advisors installation; each installation must be either wholly MS SQL or wholly Oracle. Advisors supports one of the following for databases:

- Microsoft SQL Server 2008 or **NEW** Microsoft SQL Server 2012, including SQL Server Cluster. Genesys recommends that you use MS SQL Server Enterprise Edition for optimal performance, although Standard Edition is also supported. You can install the metric graphing feature with or without the MS SQL Server partitioning feature. The partitioning feature provides flexibility and can improve performance; partitioning has more options than non-partitioning for organizing the metric graphing data that comes from Workforce Advisor and Contact Center Advisor. You must use MS SQL Server Enterprise Edition if you plan to install metric graphing and use partitioning. MS SQL Server Standard Edition does not support the partitioning feature. If you use MS SQL Enterprise Edition, but you do not use partitioning, you can use the script(s) from \sql\mssql-standard.

- Oracle 11g or **NEW** Oracle 12c. You can install the metric graphing feature with or without the Oracle database partitioning feature. The partitioning feature provides flexibility; partitioning has more options than non-partitioning for organizing the metric graphing data that comes from Workforce Advisor and Contact Center Advisor. Ensure you have Oracle Database Enterprise Edition with the partitioning option if you plan to install metric graphing and use partitioning. If you use Oracle database software that includes the partitioning feature, but you do not use partitioning, you can use the scripts from \sql\oracle-without-partitions. Advisors support connection to Oracle Real Application Clusters (RAC).

If using Oracle, you also require the appropriate Oracle JDBC driver. You can obtain the driver from Oracle's website, www.oracle.com. Advisors requires versions compatible with supported JDK versions. Drivers containing tracing code or compiled with the -g option are not necessary. See the *Genesys Supported Operating Environment Reference Guide* for supported versions of JDK and Oracle JDBC drivers.

Database Management Tools

Genesys recommends the following tools to manage Advisors database operations:

- Oracle: SQLPlus
- Microsoft SQL Server: Microsoft SQL Server Management Studio

Installing Services under Windows 2008 Server

For installations on Windows 2008 Server, the Administrator installing the Advisors components and the Apache Web server should have permissions to install an NT service.

If for some reason granting this access is not possible, you can create shortcuts to the service installers that you may run as an Administrator.

To install the Platform Geronimo NT service, create a shortcut for the `InstallAdvisorsServer.bat` file.

To install the XMLGen NT service, create a shortcut for the `InstallXMLGen.bat` file.

To install Apache (including its NT service), create a short cut for the MSI installer.

Once you have created a shortcut, right click on the shortcut, and use the `Run as administrator` option to install the NT service for that component.

Linked Servers

The creation of linked servers might be required for either Cisco or Genesys installations.

For a Cisco installation, you must link to the server containing the Cisco Intelligent Contact Management (ICM) Distributor Admin Workstation (AW) databases. These must exist before the Advisors installation can proceed.

For a Genesys installation, you might have existing metrics databases. These are either created during the Advisors Genesys Adapter installation(s), or have already been created as part of earlier Genesys Adapter installation(s) (for example, for a previous version). The creation of linked servers in a Genesys environment is required only if the metrics databases exist, or will be created, on different SQL Server instances.

System clocks

You must synchronize the system clocks of all physical servers used in a given Advisors installation with a central time server.