GENESYS™

Performance Management Advisors Deployment Guide

Deploying Frontline Advisor

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Deploying Frontline Advisor

You run a `.jar` installation file to deploy Genesys Frontline Advisor (FA). The `fa-server-installer-<version>.jar` file installs the Frontline Advisor dashboard; you use Role-Based Access Control (RBAC) privileges to control the dashboard features that each user can see and use.

You can deploy FA on a Red Hat Linux or a Windows platform, and with Oracle or MS SQL databases.

Important

In release 9.0, there are changes to the installation wizard screens; therefore, you cannot reuse your previous setup for silent installation or any saved `ant.install.properties` file.

Deployment Roadmap

The arrow icon in the following roadmap indicates where you are in the Advisors deployment process.

1. Install the databases that correspond to the Advisors products that you will deploy. Perform the database installation in the following order:

    a. AGA metrics database

    b. Grant `select` privileges on all AGA metrics views to the Platform user.

    c. Metric Graphing database

    d. Advisors Platform database
        [+] REVIEW IMPORTANT INFORMATION HERE

        If the Oracle Platform deployment script issues the following error, `ORA-20001: spCreateOneSourceView ORA-01031: insufficient privileges`, and you are sure that the Platform user has been issued all necessary privileges, then you might have role-based Oracle security set for the Platform user by your DBA. Make sure you take the deployment script from the **current_user** sub-folder in the installation package. You can apply the correct script on top of the one that you applied previously, ignoring the exceptions about existing objects and primary key violations. Alternatively, you can ask your DBA to recreate the user and the privileges and apply the correct script.

        If your installation package does not contain a **current_user** folder, edit the following scripts by replacing all entries of DEFINER with CURRENT_USER and repeat the database deployment process.

        - If initially you used `advisors-platform-<version>_Schema.sql` or `advisors-platform-<version>_ObjectsPlus.sql`, edit these scripts:
          `advisors-platform-<version>_CUSTOM_ROUTINE.sql`
          `advisors-platform-<version>_PIMPORT_xxx.sql`
          `advisors-platform-<version>_Routine1.sql`

        - If initially you used `advisors-platform-<version>_ObjectsCustom.sql` or `advisors-platform-<version>_ObjectsDefault.sql`, this would be the only script to edit.

        If you prefer, you can contact Genesys Support to obtain the edited scripts.

        Alternatively, you can set up the enhanced Oracle security to run Advisors applications as an application user with least privileges. For instructions, see Least Privileges: How to Configure Advisors Database Accounts with Minimal Privileges.

        If necessary, run the Advisors Object Migration utility. You must run the Advisors Object Migration utility when:

- You first install Advisors in an environment with a new Configuration Server or when you move an existing Advisors installation to a new Configuration Server.

- If any of the required Business Attributes folders that Advisors components use are not already present in the Configuration Server.

- If you decide to enable metrics that are not yet present in your Configuration Server.

- If you decide to use the Advisors default rollup configuration. Starting with Advisors release 9.0.001.06, a brand new Platform database contains a set of Advisors default hierarchy objects that must be added to the Configuration Server to make the automatic configuration visible on the dashboard. The automatic configuration consists of all base objects mapped to the default hierarchy. For more information, see Contact Center Advisor Default Rollup Configuration in the *Contact Center Advisor and Workforce Advisor Administrator User's Guide*.

- If you perform a new installation in an environment that previously had an Advisors release installed that was older than release 8.5.1. In this case, remove all FA metrics that are in the Configuration Server and then run the migration wizard to populate all FA and CCAdv metrics and hierarchy business attributes.

2. Create the Advisors User account in Genesys Configuration Server.

3. Install the Platform service on servers where it is required for Advisors components. The Platform service is a prerequisite for installing the following components:

   - Advisors Administration

   - Advisors Web Services

   - WA Server

   - FA Server with rollup engine

   - CCAdv/WA/FA Accessibility services

   - CCAdv/WA Resource Management console

4. Install each adapter that you will use and configure the adapter Application objects with Stat Server connections.

5. Install the Advisors components for your enterprise in the following order:

   - Contact Center Advisor server (CCAdv XML Generator)

   - Workforce Advisor server

   - Frontline Advisor server

   - SDS and the CCAdv/WA Resource Management console

6. Make any required configuration changes.

Deploying the Frontline Advisor Application

Procedure:

Prerequisites

- Review the General Prerequisites and prerequisites specific to Frontline Advisor deployment before beginning deployment.

Steps

1. Launch the installation file.
   [+] Show Steps for Linux

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

      ```
      cd /home/advisors
      ```

   b. As root, run the FA 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. The following example uses jdk1.8.0. When you run the command in your environment, be sure to enter the JDK version number that you use in your installation.

      ```
      ./jdk1.8.0_<version>/bin/java -jar fa-server-installer-<version>.jar
      ```

      See the *Genesys Supported Operating Environment Reference Guide* for information about Java versions supported with each Advisors release.

   [+] Show Step for Windows

   Do one of the following:

   - Open a command line window, and enter the following command:
     ```
     java -jar fa-server-installer-<version>.jar
     ```

   - Double-click the `fa-server-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.

   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 **Destination Directory** screen, accept the default directory, or specify a different directory. The installation directory for Frontline Advisor server must be the same as the directory where Advisors Platform has been installed.

3. Use the information provided in the Installation Screens section on this page to complete the remaining deployment screens.

4. After you deploy FA, you must modify the Apache configuration file (`httpd.conf`). See Deploy

and Configure Apache.

Installation Screens

[+] Distributed Mode - Rollup Engine

You see the **Distributed Mode - Rollup Engine** screen only if you selected the Run as a cluster member option on the **Distributed Mode Configuration** screen.

On the **Distributed Mode - Rollup Engine** screen, select one of the two options:

- Enable Rollup Engine—Enable the rollup engine if you intend the FA instance you are installing to be responsible for data aggregation. When installing Advisors Platform to support the FA instance on which the rollup engine will be enabled, you must install the Administration workbench.

  > **Tip**
  >
  > Enable the rollup engine for only one of the FA instances in a cluster for a basic setup. In a warm standby configuration, however, ensure you enable the rollup engine on both the primary and backup applications; the two do not run simultaneously, and in the event of failover, the backup must be able to continue the data aggregation processes.

- Disable rollup engine—Disable the rollup engine if you intend the FA instance you are installing to be responsible for presentation only. When installing Advisors Platform to support the FA instance on which the rollup engine will be disabled, do not install the Administration workbench.

[+] Failure Notification Configuration

On the **Failure Notification Configuration** screen, specify the email settings for system-level notifications:

- Application from address—The default *sender* of the notification message; for example, faadmin@genesys.com

- Application to address—The default *recipient* of the notification message; for example, faadmin@genesys.com

- Subject—The default subject line for notification messages; for example, Frontline Advisor Message

[+] Genesys Advisor Platform Database

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 IP v6 addresses, enclose the literal in brackets.

- Database port number—The database server's port number.

- Database name or Service name—The unique name of the database instance.

- Database user or Database schema—The Advisors user with full access to the Advisors platform database.

- Database user password—The password created and used for the Advisors platform database.

[+] Genesys Advisor Platform Database - Advanced

You will see this screen only if you select Oracle as the database type and Advanced as the JDBC connectivity setup type on the **RDBMS Type And JDBC Connectivity** installer screen. On the **Genesys Advisor Platform Database - Advanced** screen, specify the parameters for the Advisors Platform database:

- Database user or Database schema—The Advisors user with full access to the Advisors platform database.

- Database user password or Database schema password—The password created and used for the Advisors platform 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.

[+] Hierarchy Source Details

You see the **Hierarchy Source Details** screen only if you selected the Run as a single instance option on the **Distributed Mode Configuration** screen.

On the **Hierarchy Source Details** screen, enter either:

- The name of the tenant in the Genesys Configuration Server in which the monitoring hierarchy resides, and the path to the hierarchy root folder.

- The name of a Person folder in your Genesys configuration interface (for example, Genesys Administrator), and the path to that Person folder. Selecting this option restricts the hierarchy view that is loaded at startup (or reloaded using the reload feature) to the team of agents belonging to that person (supervisor).

[+] RDBMS Type And JDBC Connectivity

On the **RDBMS Type And JDBC Connectivity** screen, select either the **SQL Server** or the **Oracle** option – whichever you use for database(s). You must also select the Java Database Connectivity (JDBC) type that matches your environment. Select **Basic** for standalone databases or **Advanced** for clustered database configurations. The screens that follow are dependent on your selections on this screen.

[+] SCS Integration

Enter the Advisors Application name exactly as it is configured in Genesys Configuration Server.

Start the FA Service

Procedure:

Steps

1. Follow the Advisors Platform instructions to install the Windows service.

2. Each time the service is started, the Monitoring Hierarchy Loader runs.

3. Start the service and refresh a few times to make sure the service stays running.

4. If you experience problems, check the Platform log file. It may take up to 45 minutes to fully start the FA service, depending on the number of agents and the complexity of the hierarchy.

Troubleshooting

The following Table shows parameter validation errors that you might encounter at the end of installation.

Installation Error Message	Cause

`[java] Failed to connect to the database using connection URL:`
 	
`[java]`
`jdbc:sqlserver://192.168.xx.yy:nnn;DatabaseName=ys_fadb;user=sa;`
`password=very_secure_pwd;selectMethod=cursor`
`[java] The following exception was thrown:`
`com.microsoft.sqlserver.jdbc.SQLServerException: The TCP/IP connection to the`
`host 192.168.xx.yy, port nnn has failed. Error: "Connection refused. Verify the`
`connection properties, check that an instance of SQL Server is running on the`
`host and accepting TCP/IP connections at the port, and that no firewall is`
`blocking TCP connections to the port.`
	Wrong database server name / IP address or port number

`[java] Failed to connect to the database using connection URL:`
 	
`[java]`
`jdbc:sqlserver://192.168.xx.yy:nnnn;DatabaseName=NotAPlatformDB;`
`selectMethod=cursor;user=sa;password=very_secure_pwd`
`[java] The following exception was thrown:`
`com.microsoft.sqlserver.jdbc.SQLServerException: The TCP/IP connection to the`
`host 192.168.xx.yy, port nnnn has failed. Error: "connect timed out. Verify the`
`connection properties, check that an instance of SQL Server is running on the`
`host and accepting TCP/IP connections at the port, and that no firewall is`
`blocking TCP connections to the port."`
	Wrong database name

`[java] Exception while connecting: Login failed for user 'badUserId'.`
 	
`[java] url used:`
`jdbc:sqlserver://192.168.xx.yy:nnnn;DatabaseName=ys_fadb;selectMethod=cursor;`
`user=badUserId;password=very_secure_password`
	Wrong database user name or password

`[loadfile] Unable to load file: java.io.FileNotFoundException: C:\ (The system cannot find the path specified)`	Produced in error and can be ignored.
An error message in the FA log that contains the following string: `datamanager.adapters.MultiAdapterException`	Indicates that there is at least one (there might be more than one) configured Genesys Advisors Adapter (AGA) instance that is either not running or is not reachable. Genesys recommends the following actions to correct the condition: 1. Check all configured AGA instances. Make sure that each one is running

Installation Error Message	Cause
	and reachable from FA. 2. If you have any AGA instances that are not absolutely required for the operation of FA, remove those from the configuration. If a configured adapter is reporting this error condition, and it is running correctly, then you need to look for other problems with the adapter. For example, the adapter Application that is registered in Configuration Server might not have any Stat Servers configured, or the configured Stat Server(s) might not be running.

`C:\Users\<USERNAME>\AppData\Local\Temp\antinstall\ build.xml:189: The following error occurred while executing this line:`
 	
`C:\Users\<USERNAME>\AppData\Local\Temp\antinstall\ installer-common.xml:468: java.lang.NoClassDefFoundError: javax/xml/bind/DatatypeConverter at com.microsoft.sqlserver.jdbc.SQLServerConnection.sendLogon(SQLServerConnection.java:4061) …`
	Ensure that you are launching the installer with a supported version of the Java Development Kit (JDK). You can type java `--version` in a Windows command prompt window or in the Linux terminal to see which version is currently configured on your system. If you are using a Windows OS, add the JDK folder path to both JAVA_HOME and PATH in environment variables. If you use Red Hat Enterprise Linux, add the JDK folder path to the PATH variable.