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# Performance Management Advisors Deployment Guide

Prerequisites for CCAdv and WA

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# Prerequisites for CCAdv and WA

Before you deploy Contact Center Advisor (CCAdv), Workforce Advisor (WA), or Alert Management (AM) Administration, it is helpful to answer the following questions:

- Will you deploy the software on a Linux Red Hat or a Windows platform?
- **NEW** Where will you store log files? Starting with release 9.0.001, you can specify a storage location for log files when you run the installation wizard.
- Each of the modules associated with a CCAdv/WA installation (CCAdv XML Generator, WA server, Resource Management Console) can be installed on a different machine, or multiple modules can be installed on the same machine. If you are installing multiple modules, on which system will you install each module?
- Some of these modules require integration with SCS. For details see [Integration with Solution Control Server and Warm Standby](#). Ensure you understand the [limitations and special configuration](#) requirements when planning which Advisors applications to install on a server.
- Will you install the CCAdv application, and if so, will you install it with XML Generator and CCAdv Web Services on the same system; or will you install it in distributed mode, with CCAdv Web Services on different system(s) than the XML Generator? If distributed, which systems will host the XML Generator, and which will host the Web Services?
- Each system on which you install XML Generator is a unique cluster node. What will you use for the node ID?
- Will you install the WA application, and if so, will you install it with WA Server and WA Web Services on the same system; or will you install it in distributed mode, with WA Web Services on different system(s) than the WA Server? If distributed, which systems will host the WA Server, and which will host the Web Services?
- If you will install WA, what are your workforce management data sources and how many do you require?
- Will CCAdv or WA send email notifications about alerts?
- Where did you install Advisors Platform on this system? When installing WA Server or RMC, the installation directory must be the same as the directory in which Platform was installed.

## Prerequisites

Ensure you have completed all the tasks in the following Table before you begin Contact Center Advisor/Workforce Advisor deployment.

If you have already installed Advisors Platform on the same system, then you will have done many of these tasks. If you are installing CCAdv XML Generator on a system on which Platform is not installed, then you must do them.

Y or N	Prerequisite
	<b>All Modules</b>
	A verified Genesys environment must be ready and available.
	In a Genesys environment, you have established connection to the Genesys Configuration Server.

Y or N	Prerequisite
	While you can use any Genesys configuration interface to import Advisors privileges into a Role, or to assign Role-based permissions to Users or Access Groups for access to the Advisors business attributes, you can view the Advisors privileges associated with a Role only in Genesys Configuration Manager. If you need to view the Advisors privileges associated with Roles regularly, then ensure you have access to Genesys Configuration Manager.
	You have configured the Advisors User account in the Genesys Configuration Server. For more information see <a href="#">Creating the Advisors User</a> .
	<p>You have initialized databases—databases must be present and at the current version prior to running the installation files. The following list shows the databases required by each component:</p> <ul style="list-style-type: none"> <li>• Contact Center Advisor XML Generator: Platform database and metric graphing database</li> <li>• Workforce Advisor Server: Platform database and metric graphing database</li> <li>• Accessibility Services, or Resource Management Console: Platform database.</li> </ul> <p>You have configured administrator accounts that can be used by applications to access the databases.</p>
	Advisors Platform is successfully installed on each system on which you will install all modules (it is no longer required for CCAdv XML Generator).
	You have located the ccadv-wa-installer-<version>.jar file on the installation CD and have copied it to the local drive of your server.
	<b>CCAdv XML Generator</b>
	In a Genesys environment, you have established connection to the Genesys Solution Control Server and to its backup if there is one.
	You have installed the Local Control Agent (LCA). See <a href="#">Integration with Solution Control Server and Warm Standby</a> and <a href="#">Overview: Configuring Advisors Application Objects and Deploying Modules that are Controlled by SCS</a> for more information.
	You have created the required Application and Host objects in Genesys Administrator or Configuration Server. If you are configuring Advisors in warm standby mode, then you have configured both primary and backup Applications and associated each primary Application with its backup for failover. See <a href="#">Integration with Solution Control Server and Warm Standby</a> and <a href="#">Overview: Configuring Advisors Application Objects and Deploying Modules that are Controlled by SCS</a> for more information.
	<p>There is a database-level connection between the Advisors Platform database and the datasource database (a Genesys metrics database).</p> <p>To configure the connectivity, see <a href="#">Configure Oracle Metrics Data Sources</a>.</p>
	For Genesys installations, the Advisors Genesys Adapter is installed.
	You have set the Regional and Language options to the locale for which you want the servers to be deployed.
	<b>Workforce Advisor Server</b>
	In a Genesys environment, you have established connection to the Genesys Solution Control Server.
	You have installed the Local Control Agent (LCA). See <a href="#">Integration with Solution Control Server and Warm Standby</a> and <a href="#">Overview: Configuring Advisors Application Objects and Deploying Modules that are Controlled by SCS</a> for more information.

Y or N	Prerequisite
	<p>You have created the required Application and Host objects in Genesys Administrator or Configuration Server. If you are configuring Advisors in warm standby mode, then you have configured both primary and backup Applications and associated each primary Application with its backup for failover. See <a href="#">Overview: Configuring Advisors Application Objects and Deploying Modules that are Controlled by SCS</a> for information.</p>
	<p>Verified workforce management data sources must be ready and available.</p> <p>For Workforce Advisor installations connecting to Genesys WFM, the server running WA must be able to access your Genesys WFM installation.</p> <p>To verify this access, ensure you can do all of the following from your WA server machine:</p> <ol style="list-style-type: none"> <li>1. Successfully ping the server name or IP address specified in the base WFM URL.</li> <li>2. Successfully telnet the server name or IP address and the port specified in the base WFM URL.</li> <li>3. Successfully ping the host name of your Genesys WFM instance as it appears in your WFM server's Genesys Administrator application.</li> </ol> <p>Your WA server must have access to the WFM server by its associated Genesys Administrator host name. If it does not, an UnknownHostException occurs because the SOAP API's service locator provides a host name that is not reachable by the WA server.</p> <p>If you cannot ping or access the Genesys WFM instance using the associated Genesys Administrator host name from the machine hosting the WA server, then you must add the following lines to the hosts file on the machine that will host the WA server:</p> <pre># For WA connectivity with WFM [IP address of WFM server] [Associated Genesys Administrator host name for the WFM instance]</pre> <p>Example: 192.168.98.229 demosrv.genesyslab.com  The hosts file is OS-specific. For example, for Windows 2003, the host file resides in the following location:  %SystemRoot%\system32\drivers\etc\</p>

## Collect Information

During deployment of Contact Center Advisor/Workforce Advisor, the installer will prompt you for the information in the following Table. Default values provided by the installer are entered in the Table.

Information	Input
<b>All Modules</b>	
<p>Location and name of the base directory in which you will install Advisors.</p> <p>The installation directory for CCAdv/WA modules must be the same as the directory where Advisors Platform was installed. Contact Center Advisor XML Generator does not require Platform, so can be installed independently.</p>	<p>Default on Windows:</p> <p>C:\Program Files\GCTI\Advisors</p> <p>Default on Linux:</p> <p>/opt/gcti/advisors</p>
Location of the Java Development Kit (root directory).	
<b>Contact Center Advisor XML Generator</b>	
<p><b>NEW</b> Path to the directory in which log files will be written. Starting with release 9.0.001, the installation wizard prompts you to provide the log file</p>	Default on Windows:

Information	Input
<p>storage location, and provides a default path.</p> <p>Specifying the log file directory in the installation wizard will not change the directory that was set for previous installations.</p> <p>For more information about log files, see <a href="#">Adjust Logging Settings</a> and <a href="#">Configure Administrative Actions Logs</a>.</p>	<p>c:\genesys\log\advisors\ccadv-xmlgen\</p> <p><b>Default on Linux:</b></p> <p>/mnt/log/advisors/ccadv-xmlgen/</p>
<p>Connection details to the Genesys Configuration Server:</p> <ul style="list-style-type: none"> <li>• The name of the Configuration Server (the Application name, obtained from Genesys Administrator). If you have Configuration Servers configured in High Availability mode, enter the name of the primary Configuration Server.</li> <li>• The name or IP address of the machine that hosts the Configuration Server.</li> <li>• The port that the configuration server is listening on (if you are not using a TLS connection). If you use a TLS connection, identify the TLS port number.</li> <li>• The name of the application that XML Generator will use to log in to the Configuration Server (for example, default).</li> <li>• The user name and password of the account that XML Generator will use to connect to the Configuration Server. This is the 'Advisors User'.</li> </ul> <div data-bbox="185 1062 961 1192"> <p><b>Important</b></p> <p>If you are installing CCAdv XML Generator on an existing Advisors Platform server, you must use the Configuration Server connection properties that were provided during the Advisors Platform installation. See also the <a href="#">Advisors Platform installation prerequisites</a> for additional information.</p> </div> <p>If you will connect to the Configuration Server using TLS, then you also require the following information:</p> <ul style="list-style-type: none"> <li>• The TLS port number for the Configuration Server.</li> <li>• The location of the TLS properties file.</li> </ul> <p>If you use a backup Configuration Server, you require the following information, as well:</p> <ul style="list-style-type: none"> <li>• The name of the backup Configuration Server (the Application name, obtained from Genesys Administrator).</li> <li>• The name or IP address of the machine that hosts the backup Configuration Server.</li> <li>• The port on which the backup Configuration Server listens.</li> </ul>	<p>Defaults are:</p> <ul style="list-style-type: none"> <li>• Configuration server name: confserv</li> <li>• Configuration server port: 2020</li> <li>• Application name: default</li> </ul>
<p>The name of the default tenant in the Configuration Server under which the Advisors metadata is maintained.</p> <p>When multiple Advisors suite installations are deployed to use the same Configuration server, the default tenant selected on each Advisors suite installation must be a different tenant. The default tenant configuration is selected when installing the Advisors Platform server.</p>	

Information	Input
The name, in Configuration Server, of the XML Generator Application. See <a href="#">Integration with Solution Control Server and Warm Standby</a> for more information.	
The name, in Configuration Server, of the primary Solution Control Server application.	Default is SCServer.
The port number on which Local Control Agent listens on this system.	Default is 4999.
Node ID for this server in the Advisors cluster. Use letters, numbers, or the dash character. The maximum 16 characters. For details see <a href="#">Advisors Cluster Information</a> .	
The IP address or host name that other cluster members will use to contact this node (not localhost or 127.0.0.1).	
The local host address (localhost or 127.0.0.1).	Default is localhost.
The HTTP port number the members of the cluster will use to communicate with XML Generator. If you are going to install two different deployments of XML Generator on the same machine see <a href="#">Multiple Advisors Deployments on One System</a> for how to choose this port number.	Default is 8090.
The Java Messaging Service port number the members of the cluster will use to communicate with XML Generator. If you are going to install two different deployments of XML Generator on the same machine see <a href="#">Multiple Advisors Deployments on One System</a> for how to choose this port number.	Default is 61616.
The port number the cluster's distributed caching will use to communicate with XML Generator. If you are going to install two different deployments of XML Generator on the same machine see <a href="#">Multiple Advisors Deployments on One System</a> for how to choose this port number.	Defaults are 11211 and 11212.
The maximum number of times that XML Generator should attempt to connect to a database if there is a connection failure.  This parameter is applicable to retry attempts when XML Generator is already running; that is, after establishing connections at startup.	Default is 32 times.
The number of seconds between CCAdv XML Generator's reconnection attempts in the event of a database connection failure.  This parameter is applicable to retry attempts when XML Generator is already running; that is, after establishing connections at startup.	Default is 30 seconds.
<p>The following details for the SMTP (mail) service that XML Generator will use to send email:</p> <ul style="list-style-type: none"> <li>• The host name or IP address of the SMTP server that XML Generator will use to send email.</li> <li>• (Optional) The address from which XML Generator will send notification email about alerts.</li> <li>• The address to which to send notification email for support staff concerning issues with XML Generator. This address will also appear in the From: header of these types of email.</li> </ul>	<p><b>Important</b></p> <p>Advisors modules store the email addresses that you enter on the installation wizards and use those addresses to notify support staff about operating issues. The email addresses are stored in the relevant properties file. A user's email address persists in the properties file even after a user's Person object is removed from Configuration</p>

Information	Input
	<p>Server. An email address that contains an employee's full name can be considered to be personally identifiable information (PII) and therefore, to be compliant with the General Data Protection Regulation (GDPR), you must remove the user's email address from the properties files if the user makes a "forget me" request. The need to update the properties file(s) to remove email addresses can be avoided if you always use an email alias for support staff, rather than user-identifying email addresses. For example, use <code>advisors.support@yourcompany</code> instead of <code>john.doe@yourcompany.com</code>. For more information about PII and the GDPR, see the <a href="#">Genesys Security Deployment Guide</a>.</p>
<p>Frequency (in seconds) at which CCAdv XML Generator stores metrics and threshold violations for the values calculated for the Medium and Long groups of time profiles.</p> <p>For example, if you enter 120 seconds for this parameter, XML Generator stores metrics and threshold violations for these time profiles no more often than that. However, XML Generator may store the view data less frequently depending upon load and the complexity of the configuration.</p>	<p>Default is 120 seconds.</p>
<p>The frequency (in seconds) at which snapshots are stored in the metric graphing database.</p> <p>For example, if you enter 60 seconds for this parameter, XML Generator and WA Server store graphable snapshots no more often than that. However, they may store the snapshots less frequently depending upon load and the complexity of the configuration.</p>	<p>Default is 60 seconds.</p>
<p>Should graphs display values from the previous day? Do <i>not</i> check the <b>Start at midnight</b> box if you want graphs to display values from the previous day.</p>	
<p>What are XML Generator's sources of real-time data? Specify the following:</p> <ul style="list-style-type: none"> <li>the database name or linked server name</li> <li>the source type (Genesys or Cisco)</li> <li>(optional) the display name</li> <li>the threshold update delay—how long CCAdv will wait for new data from this data source before notifying users on the CCAdv dashboard, and, if configured to do so, administrators by email.</li> <li>the Relational Database Management System (RDBMS) type (MS SQL or Oracle)</li> </ul>	

Information	Input
Up to five data sources may be added to the deployment of XML Generator.	
<b>Workforce Advisor Server</b>	
The name, in Configuration Server, of the WA Server Application.	
The name, in Configuration Server, of the Solution Control Server application.	Default is SCServer.
The port number on which Local Control Agent listens on this system.	Default is 4999.
Specify your workforce management data sources (IEX TotalView, Aspect eWFM, Genesys WFM).	
The 'From' address WA puts in email it sends about alerts to users that are members of distribution lists configured in the Administration module.	
<p>If you are using WFM data from <b>IEX TotalView</b>, then specify:</p> <ul style="list-style-type: none"> <li>the port number on which the FTP connection in WA listens for data from TotalView.</li> </ul>	Default port number is 6021.
<p>If you are using WFM data from <b>Aspect eWFM</b>, then specify:</p> <ul style="list-style-type: none"> <li>the URL of the directory from which WA reads data from eWFM. For example file:/// followed by the location of the eWFM files. Additional information is provided in the descriptions of installation screens on the <a href="#">Deploying CCAdv and WA</a> page.</li> </ul>	
<p>If you are using WFM data from <b>Genesys WFM</b>, then specify:</p> <ul style="list-style-type: none"> <li>The Application name of the WFM server as configured in the Configuration Server.</li> <li>The URL of the WFM server.</li> <li>The username WA Server will use to connect to Genesys WFM.</li> <li>The password WA Server will use to connect to Genesys WFM.</li> <li>The interval (in ms) at which the Genesys WFM service is polled for forecast data.</li> <li>The number of hours of forecast metrics to get on each polling.</li> </ul>	<p>Default values are:</p> <ul style="list-style-type: none"> <li>Application name: WFM_Server</li> <li>Username and password: no defaults.</li> <li>Polling interval: 1800000 ms. (30 minutes.)</li> <li>Number of hours of forecast metric to retrieve: 24 hours.</li> </ul>
<b>CCAdv XML Generator and Workforce Advisor Server</b>	
The time profile to use for default historical metrics that you want to display for agent groups in Contact Center Advisor and Workforce Advisor. The choices are 5 minute sliding, or 30 minute growing. The same choice applies to both applications.	Default is 5 minutes sliding.
<p>Type of database used in your enterprise (MS SQL or Oracle), and connection details to the Advisors Platform database:</p> <ul style="list-style-type: none"> <li>The host name, IP address, or named instance of the server on which the Advisors Platform database is installed.</li> <li>Port number that the database listens on (you do not require this</li> </ul>	<p>Default values for port number:</p> <ul style="list-style-type: none"> <li>Oracle: 1521</li> <li>MS SQL: 1433</li> </ul> <p>When using numerical IP</p>

Information	Input
<p>information if the server is a named instance)</p> <ul style="list-style-type: none"> <li>• The Platform database name (the Service name for an Oracle installation)</li> <li>• The username (the schema for clustered databases or an Oracle installation) and password associated with the account that modules will use to access the Platform database</li> <li>• For Oracle environments, the location of the JDBC driver.</li> <li>• For clustered databases, the location of the file that contains the JDBC URL (you should have the freeform JDBC URL in a text file).</li> </ul> <p>Use the same database configuration that was specified when the Advisors Platform database was configured.</p>	<p>addresses or names with dots in the installations with MS SQL, enclose the literal in brackets. If the MS SQL database server is a named instance, then omit the port number and use double backslash: &lt;host name&gt;\\&lt;instance name&gt;</p>
<p>Connection details to the Metric Graphing database:</p> <ul style="list-style-type: none"> <li>• The host name, IP address, or named instance of the server on which the Metrics Graphing database is installed.</li> <li>• Port number on which the database listens (you do not require this information if the server is a named instance).</li> <li>• The Metrics Graphing database name (the Service name}} for an Oracle installation).</li> <li>• The username and password associated with the account that modules will use to access the Metrics Graphing database.</li> <li>• For clustered databases, the location of the file that contains the JDBC URL (you should have the freeform JDBC URL in a text file).</li> </ul>	<p>Default values for port number:</p> <ul style="list-style-type: none"> <li>• Oracle: 1521</li> <li>• MS SQL: 1433</li> </ul> <p>When using numerical IP addresses or names with dots in the installations with MS SQL, enclose the literal in brackets. If the MS SQL database server is a named instance, then omit the port number and use double backslash: &lt;host name&gt;\\&lt;instance name&gt;</p>