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Performance Management Advisors Deployment Guide

[Create the Advisors User Account](#)

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Deployment 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 servers where it is required for Advisors components.**
 - Contact Center Advisor Web services
 - Workforce Advisor
 - Frontline Advisor
 - Contact Center Advisor-Mobile Edition
 - Resource Management Console
4. Install each adapter you will use (AGA and ACA).
5. Register the Stat Servers that you plan to use with Advisors.
6. **[+] Install the Advisors components for your enterprise.**
 - a. Contact Center Advisor
 - b. Workforce Advisor
 - c. Contact Center Advisor – Mobile Edition
 - d. SDS and Resource Management
 - e. Frontline Advisor
7. Make any required configuration changes.

You must create an account in the Configuration Server that can be used by the Advisors products to connect to and retrieve information from the Configuration Server. In this Deployment Guide, the account is referred to as the *Advisors User* account, but you can give the account a name of your


choice. That is, it is not necessary to name the account *Advisors User*. The permissions shown in the following Table are required for this account.


Important

You must use Configuration Manager to edit the permissions as described in the following Table; in Genesys Administrator, you cannot edit permissions for everything listed below.

Important

You must grant the Advisors user a privilege that allows that user to create materialized views if you are not using the supplied deployment scripts to create the user.

Object	Permissions	Notes
Applications folder	Execute,  Change	Only for Configuration Server 8.1.2 and later. Required for the Platform and AGA user account to connect to the Configuration Server and Stat Servers. Starting with release 8.5.1, Change permission is required so the

Object	Permissions	Notes
		installers can update properties of Application objects that correspond to Advisors servers.
 Hosts folder	Read	Starting with release 8.5.1, Read permission is required on the Hosts folder so that the hosts on which Solution Control Server is deployed can be read from the Configuration Server.
Stat Server Applications	Read	
Tenants	Read	
Agent Groups	Read, Read Permissions, Change, Change Permissions	Starting with release 8.1.5, Change and Change Permissions are required to

Object	Permissions	Notes
		propagate changes saved in the Base Object Configuration page to Configuration Server.
Switches	Read	
DNs (of type ACD Queues and Virtual Queues)	Read, Read Permissions, Change, Change Permissions	Starting with release 8.1.5, Change and Change Permissions are required to propagate changes saved in the Base Object Configuration page to Configuration Server.
	Read, Read Permissions	
Persons	Change	Required only in the following circumstances: <ul style="list-style-type: none"> if the Advisors Administration module will be used to modify user accounts

Object	Permissions	Notes
		<ul style="list-style-type: none"> NEW starting with Advisors Platform release 8.5.101.17, if the Resource Management Console will be used to modify agent skills (the Change permission is required to save the agent skill changes)
NEW Skills	Read	Starting with Advisors Platform release 8.5.101.17, Read permission is required to view skills in the Resource Management Console.
Scripts (of type Interaction Queues)	Read, Read Permissions, Change, Change Permissions	Starting with release 8.1.5, Change and

Object	Permissions	Notes
		Change Permissions are required to propagate changes saved in the Base Object Configuration page to Configuration Server.
Access Groups	Read, Read Permissions	
	Change	Only required if Advisors Administration module will be used to modify user accounts.
Calling lists	Read, Read Permissions, Change, Change Permissions	Starting with release 8.5.0, Change and Change Permissions are required to propagate changes saved in the Base Object Configuration page to Configuration Server.
Roles	Read, Read Permissions	Used to

Object	Permissions	Notes
		determine functional permissions for users.
Business Attributes	Read, Read Permissions	Used to determine access to Advisors metadata objects.
Advisors Metrics Business Attributes	Read, Create, Change, Delete, Read Permissions, Change Permissions	Used for the Metric Manager beginning in release 8.1.3.
Folders in Persons	Read, Read Permissions	Required for FA.
Folder in Agent Groups	Read, Read Permissions	Required for FA.
SDS Application	Read, Change, Read Permissions	Only required if you deploy Supervisor Desktop Service.