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Performance Management Advisors Deployment Guide

Deploying CCAdv and WA

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Deploying CCAdv and WA

If you are installing any or all of the following Advisors modules, use the procedures and information in this section:

- Contact Center Advisor (CCAdv)
- Contact Center Advisor-Mobile Edition (CCAdv-ME)
- Workforce Advisor (WA)
- Alert Management (AM) Administration

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

If you use a Genesys computer-telephony integration (CTI) installation, you must install Advisors Genesys Adapter with CCAdv and WA applications. For Cisco installations, no adapter is required.

If you are upgrading your version of CCAdv-ME, ensure you read [Upgrade CCAdv-ME](#).

For information about deploying smartphone client applications, see [Deploy Smartphone Client Applications](#).

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). See additional information for CCAdv/WA installations.
 5. Register the Stat Servers that you plan to use with Advisors.
 6. Install the Advisors components for your enterprise:
 -  Contact Center Advisor
 -  Workforce Advisor
 -  Contact Center Advisor – Mobile Edition
 - Frontline Advisor
 - SDS and Resource Management
 7. Make any required configuration changes.

You run a single .jar installation file to deploy any or all of the modules. Use the procedure below to start your installation. The installer guides you through the deployment. The screens displayed during your deployment are dependent on the selections you make on the **Modules to Install** screen. Information about each screen is available on the **Installation Screens** tab below.

<tabber>

Procedure=

Procedure: Deploying CCAdv, CCAdv XML Generator, WA, or CCAdv-ME

Steps

1. Review the [General Prerequisites](#) and [prerequisites specific to CCAdv/WA deployment](#) before beginning deployment.
2. 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 CCAdv/WA 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 ccadv-wa-installer-<version>.jar
```

[+] Show Step for Windows

Do one of the following:

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

```
java -jar ccawa-installer-<version>.jar
```
- Double-click the `ccawa-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.

3. On the **Modules to Install** screen, select which Advisors application(s) you will install. You can install an individual application or as many applications as you require during a single run of the installation file.

Each of the modules can be installed on a different machine. Advisors Platform must be installed on each server where a module is installed, with the exception of CCAdv XML Generator. CCAdv XML Generator does not require Advisors Platform. When installing multiple modules on the same machine, the underlying components, such as Advisors Platform, are installed only once.

[+] Show Information about Selections

The modules are:

- Contact Center Advisor XML Generator application—Install this module no more than twice in one cluster of Advisors systems. One instance will run as the primary, and the second, if present, will run as the backup. Starting in release 8.5.1, CCAdv XML Generator runs independently of Advisors Platform.
- Contact Center Advisor Web services, including the dashboard—You can install more than one instance in one deployment of Advisors. You can install it on the same system on which you installed the XML Generator, or on a different system.
- Contact Center Advisor Mobile Edition—Contact Center Advisor application for mobile devices.
- Workforce Advisor server— Install this module no more than twice in one cluster of Advisors systems. One instance will run as the primary, and the second, if present, will run as the backup.
- Workforce Advisor Web service, including the dashboard—You can install more than one instance in one deployment of Advisors. You can install it on the same system on which you installed the Workforce Advisor server, or on a different system.

- Alert Management administration— Install this module on the systems on which you installed the Administration Workbench when installing Platform.
- 4. On the **Destination Directory** screen, specify the location and name of the base directory in which you will install Advisors. 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.
- 5. Use the information provided on the *Installer Screens* tab on this page to assist you to complete the remaining deployment screens.

|–| Installer Screens=

[+] CCAdv-ME Server

- Allow client password caching—Determines whether the server will tell its clients to cache the password on the client. If this checkbox is not selected, the user is redirected to the login page every time he or she launches an application.
- Logo link URL (image link)—Enter the URL to which users are redirected when they click on your enterprise's logo on the login screen. This is optional configuration; it is not required.
- URL that Logo links to—You can enter an image URL of the company's logo that will be visible on the login page. This hyperlinked image is used to personalize the login page. This is optional configuration; it is not required.
- Interval for file purge (ms)—This value (in milliseconds) specifies the frequency at which to delete the charting local cache from the server.
- Delay for retries on failed response—This value (in milliseconds) specifies the delay between retries when a failure occurs.
- Number of retries—Number of times each resource retries to build the response when a failure occurs in the Advisors server.
- Device refresh interval (ms)—This value (in milliseconds) represents the refresh time of the client views when auto-refresh is enabled.

[+] CCAdv-ME Trend Charting

Enter the time periods for trend charting on the **CCAdv-ME Trend Charting** screen. The values are in minutes. Period two should be bigger than period one and smaller than period three. Period three should be smaller than the retention period set by the CCAdv server.

Enter numerical characters only in these fields, such as 30, 60, and 120.

[+] Data Source

For each data source not already in the database, specify the following:

- the database name or linked server name
- the source type (Genesys or Cisco)
- (optional) the display name
- the threshold update delay. This is how long CCAAdv will wait for new data from this data source before notifying users via the CCAAdv dashboard, and, if configured to do so, administrators via e-mail.
- the Relational Database Management System (RDBMS) type

If you have additional data sources to add, select **Add another data source** and repeat this step.

Up to five data sources may be added using the installer.

[+] Database Type

Specify the type of database you use in your enterprise.

[+] Genesys Advisor Platform Database

Enter the database connectivity parameters for the already created or upgraded database (that is, the database must be present and at the current version prior to running the installer).

When using numerical IPv6 addresses, enclose the literal in brackets.

If the database server is a named instance, then omit the port number.

[+] Genesys Advisor Platform Database - Advanced

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

[+] Java Development Kit

Enter or select the folder location for the Java Development Kit.

[+] Metric Graphing Database

Specify the connection parameters for the Metric Graphing database.

When using numerical IPv6 addresses, enclose the literal in brackets.

[+] Metric Graphing Database - Advanced

- Database user and Database user password—The database schema and password created and used for the Metric Graphing 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.

[+] Oracle setup type

Specify whether you use Oracle basic (single instance) or Oracle Real Application Cluster (RAC) databases.

[+] 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.

[+] Workforce Advisor Page 1 - SCS Integration

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

[+] Workforce Advisor Server Page 2 - WFM Systems

Select your sources for workforce management data.

[+] Workforce Advisor Server Page 3 - EMail Addresses

Enter the e-mail address that will appear in the From: header of e-mail that WA sends about alerts, to users that are members of distribution lists configured in the Administration Workbench. For example, DONOTREPLY@genesys.com.

[+] Workforce Advisor Server Page 4 - IEX TotalView

Enter the FTP Server port number on which the FTP connection in WA listens for data from TotalView.

[+] Workforce Advisor Server Page 5 - Aspect eWFM

Enter the Aspect eWFM base retrieval URL.

The base retrieval URL should be `file:///` followed by the location of the eWFM files.

If the component must read or write data kept on a drive accessible over the network, then enter the path name to the directory using the Uniform Naming Convention, which includes the host name and the name of the shared drive.

For example:

`//host_name/shared_drive_name/root_directory_name/directory_1_name/directory_2_name`

You can use forward slashes in the name even on Windows systems. If you use back slashes, they must be escaped.

For example:

`\\\\host_name\\shared_drive_name\\root_directory_name\\directory_1_name\\directory_2_name`

[+] Workforce Advisor Server Page 6 - Genesys WFM

- **Base URL**—The base URL should contain the server name or IP address of the machine where the WFM server is installed, as well as the port on which the server is configured and listening. For example, `http://192.168.98.215:5007`. When using numerical IP v6 addresses, enclose the literal in brackets.
- **Application name**—The application name of the WFM server as configured in the Configuration Server or Genesys Administrator.
- **User ID**—Enter either a specific user ID to indicate the identity of the requests, or enter 0 (zero) to indicate no user. The user ID is used as a reference in the connection string to Genesys WFM.
- **Polling interval (ms)**—The interval at which the Genesys WFM service is polled for forecast data.
- **Number of hours to harvest**—The number of hours of forecast metrics to get during each polling interval.

[+] XML Generator Page 1 - Config Server

Starting in release 8.5.1, CCAdv XML Generator runs independently of Advisors Platform; it is no longer necessary to install Advisors Platform to support XML Generator. Also, XML Generator more actively communicates with Genesys Configuration Server, particularly in warm standby setups. You must, therefore, enter some of the same information for XML Generator's use that you entered for Advisors Platform.

On the **XML Generator Page 1 - Config Server** screen, enter information about the Genesys Configuration Server that is part of your deployment:

- **Config Server Name** - The name of the primary configuration server; for example, `confserv`. The name is obtained from the Configuration Manager and is case sensitive.
- **Config Server Address** - The name or IP address of the machine hosting the Configuration Server. When using numerical IPv6 addresses, enclose the literal in brackets.
- **Config Server Port Number** - The port on which the configuration server is listening; for example, 2020. If you enter a port number in this field, and then enable a TLS connection, this port number is ignored.
- **Config Server Client Name** - Enter the name of the application that Advisors Platform will use to log in to the Configuration Server (for example, `default`).
- **Config Server user** - The user name of the account that Advisors Platform will use to connect to the Configuration Server; for example, `default`.

- **Config Server password** – The password of the account that Advisors Platform will use to connect to the Configuration Server. The Genesys Configuration Server password is encrypted and saved in the `..\GCTI\Advisors\conf\GenesysConfig.properties` file by default (unless altered). To change the password, see [Change Encrypted Passwords](#).
- **Enable TLS connection** – To configure a TLS connection to the Configuration Server, select this option on the installation screen.
- **Config Server TLS Port Number** – Enter the Configuration Server TLS port number. When TLS is enabled, Advisors Platform uses the TLS port number instead of the unsecured port number.
- **Locate TLS properties file** – Identify the location of the TLS properties file. The TLS properties file contains all the properties required to connect successfully using TLS, as well as any other optional TLS attributes that you use.
- **Add backup server** – Select this checkbox if you have a backup Configuration Server for this installation.
If you select the Add backup server checkbox, the **Backup config server** screen displays after you click Next.

NEW **[+] XML Generator Page 2 - Backup Config Server**

The **XML Generator Page 2 - Backup Config Server** screen displays only if you selected the Add backup server checkbox on the **XML Generator Page 1 - Config Server** screen.
Enter the backup Configuration Server details:

- Backup Server Name
- Backup Server Address
- Backup Server Port Number

NEW **[+] XML Generator Page 3 - Config Server**

Enter the name of the Object Configuration User account (configured in Configuration Server). You must enter this information if you use a Genesys data source. This is not applicable if you use only Cisco data sources.
You are not prompted for the password for this user account because there is no user authentication performed for this user.

NEW **[+] XML Generator Page 4 - Config Server**

Enter the name of the default Genesys tenant.

NEW **[+] XML Generator Page 5 - SCS Integration**

Enter the XML Generator application name exactly as it is configured in the Genesys Configuration Server.

NEW **[+] XML Generator Page 6 - Cluster Member**

Configure this XML Generator installation as a unique node in the cluster. Each server on which you install XML Generator requires a unique cluster node ID. On this screen you also enter the port number that nodes in this cluster use to communicate. The data you enter on this screen, and the following screen (**XML Generator Page 7 - Cluster Member**), is entered in the `ActiveMQ.properties` and `Caching.properties` files in the Advisors Platform database. Configure the node with the following information:

- **Node ID**—A unique ID across all XML Generator installations. The ID must not contain spaces or any special characters, and must be only alpha numeric. Node IDs are not case sensitive. Within one cluster, `Node1`, `node1`, and `NODE1` are considered to be the same ID. You can use `node1`, `node2`, and so on.
- **IP Address/Hostname**—The IP address or host name that other cluster members will use to contact this node; for example, `192.168.100.1`. It is not `localhost` or `127.0.0.1`. When using numerical IP v6 addresses, enclose the literal in brackets.
- **Localhost address**—The local host address: `localhost` or `127.0.0.1`.
- **XMLGen Port Number**—The port number that the nodes in this cluster use to communicate. If you are installing only one deployment of Advisors, accept the default that the installer offers. The port number must be unique to this deployment of Advisors. All nodes in one cluster must use the same port number.

[+] XML Generator Page 7 - Cluster Member

Enter information about port numbers used for communication within the cluster. The data you enter on the preceding screen (**XML Generator Page 6 - Cluster Member**) and on this screen is entered in the `ActiveMQ.properties` and `Caching.properties` files in the Advisors Platform database.

- **JMS port**—The Java Message Service (JMS) port number.
- **The first port in range and The last port in range**—Specify the port to be used by the distributed cache for communication. If you are installing only one deployment of Advisors, accept the default that the installer offers. The port number must be unique to this deployment of Advisors. All nodes in one cluster must use the same port number.

[+] XML Generator Page 8 - SMTP Server

Enter the host name or IP address of the SMTP server that XML Generator will use to send e-mail with ERROR messages. You can see the ERROR messages in the log file for XML Generator.

[+] XML Generator Page 9 - Generation Interval

Enter the interval for the Medium and Long groups of time profiles. 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 might store the view data less frequently depending on load and the complexity of the configuration.

[+] XML Generator Page 10 - DB Connection Retry

Enter the maximum number of retry 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.

Enter the number of seconds between 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.

[+] XML Generator Page 11 - EMail Addresses

Alert E-mail From Address: Enter the e-mail address that will appear in the From: header of e-mail that XML Generator sends about alerts, to users that are members of distribution lists configured in the Administration Workbench. For example, DONOTREPLY@genesys.com.
Enter the e-mail address that will appear in the From: header of e-mail that WA sends about alerts. For example, DONOTREPLY@genesys.com.

Support E-mail Address: Enter the e-mail address to which XML Generator will send e-mail about events other than alerts. For example, an e-mail sent when XML Generator has not been able to connect to an external data source within the configured number of minutes. The address entered in this field also appears in the From: header of these types of e-mails.

[+] XML Generator Page 12 - Metric Graphing

Specify how frequently (in seconds) snapshots should be stored in the metric graphing database. For example, if you enter 60 seconds, XML Generator stores graphable snapshots no more often than that. However, XML Generator may store the snapshots less frequently depending upon load and the complexity of the configuration.

Specify whether graphs should display values from the previous day. If you select the **Start at midnight** checkbox, then graphs will not display values from the previous day. Also, an open graph will delete values from the previous day as it reaches midnight.

See [Configure Metric Graphing Properties](#) for detailed information.

[+] XML Generator and Workforce Advisor - Page 1

Select the time profile for the historical agent group metrics that CCAdv and WA will display.

If you choose **5 minute sliding**, then CCAdv and WA will display agent group metrics from the most recent 5 minutes. If you choose **30 minute growing**, then they will display agent group metrics from the current half hour.

For metrics imported from CISCO ICM, Advisors always imports agent group metrics with the 5 minute sliding profile. If you are running Advisors with CISCO ICM, and you choose the 30 minute growing option here, then on the dashboards, historical agent group metrics will display as a dash. Genesys recommends that you use the five minute growing setting if you have a CISCO source of data.

[+] XML Generator and Workforce Advisor - Page 2

Enter information to connect to the Genesys Management Layer on the **XML Generator and Workforce Advisor - Page 2** screen. You must configure these properties for both a basic Advisors setup, as well as a warm standby setup.

- LCA port—The LCA port number for the server on which you are currently deploying a CCAdv or WA component. Unless you changed the LCA port number, accept the default.
- SCS application name—The name of the Solution Control Server application in Configuration Manager or Genesys Administrator.

[-] Troubleshooting=

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

Installation Error Message	Cause
<pre>[java] Failed to connect to the database using connection URL: [java] jdbc:sqlserver://192.168.xx.yy:nnn;DatabaseName=ys_eadb;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."</pre>	Wrong database server name / IP address or port number
<pre>[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."</pre>	Wrong database name
<pre>[java] Exception while connecting: Login failed for user 'badUserId'. [java] url used: jdbc:sqlserver://192.168.xx.yy:nnnn;DatabaseName=ys_eadb;selectMethod=cursor;user=badUserId; password=very_secure_password</pre>	Wrong database user name or password
<pre>[loadfile] Unable to load file: java.io.FileNotFoundException: C:\ (The system cannot find the path specified)</pre>	Produced in error and can be ignored.