Performance Management Advisors Deployment Guide

Prerequisites for Advisors Platform

12/19/2025

Prerequisites for Advisors Platform

Contents

Before you deploy Advisors Platform, it is helpful to answer the following questions:

- Will you deploy Advisors Platform on a Linux Red Hat or a Windows platform?

- Is there a need to have two distinct Advisors deployments on one system?

- On which server will you install the Advisors Administration module? The Administration module must be installed on at least one system.

- Will you install the applications (FA, CCAdv, WA) distributed in a cluster on several systems, or all on one system?

- Each system on which you install Advisors Platform or XMLGen is a unique cluster node. What will you use for the node ID?

- Where are you installing Advisors (in which directory)? The default location on Windows is `C:\ProgramFiles\GCTI\Advisors`. If you do not create the directory before deployment, you can create it as part of the deployment process.

- Do you want applications to send e-mail notification messages? From what address will an application send notifications (for example, `DONOTREPLY@<your enterprise>.com`)? To what e-mail address will an application send notifications?

- Which language(s) will be used for email notifications from the system? (Advisors support English, German, and French in release 8.5.1.)

- **NEW** Will you later deploy, on this system, one of the following modules?

  - CCAdv XML Generator

  - Workforce Advisor Server

  - Frontline Advisor Server (with the rollup engine)

  - Resource Management Console

  If so, when installing Advisors Platform, you must specify a Configuration Server connection that has permission to change applications and agent groups in the Configuration Layer.

- Will you connect to the Genesys Configuration Server using TLS?

- Do you want update events from the Configuration Server to update the Advisors database with the new information (that is, do you want to synchronize user updates between Configuration Server and the Advisors database)? If yes, which instance of Advisors Platform will maintain the synchronization (in a clustered environment, a single Platform instance must be designated as responsible for maintaining the user account synchronization)?

- Plan your integration of Advisors with Solution Control Server.

  - Ensure you understand the limitations and special configuration requirements when planning which Advisors applications will be installed on a server.

  - If you plan an HA deployment that supports warm standby, you might require an additional license. See Licenses.

  - You require a Solution Control Server (SCS), and optionally, the Solution Control Interface (SCI) (you can also use Genesys Administrator or Configuration Manager).

  - You must configure Application and Host objects in Genesys Administrator or Configuration Manager for some Advisors modules. See Integration With Solution Control Server.

Prerequisites

Ensure you have completed all the tasks in the following Table before you begin Advisors Platform deployment.

Y or N	Prerequisite
	A verified Genesys environment must be ready and available.
	In a Genesys environment, you have established connection to the Genesys Configuration Server and to its backup if there is one. **NEW** If you are later going to deploy one of the following modules on this system, then this connection must have permission to change applications and agent groups in the Configuration Layer: • CCAdv XML Generator • Workforce Advisor Server • Frontline Advisor Server (with the rollup engine) • Resource Management Console Additionally, if this is a server on which you will later deploy CCAdv XML Generator, Workforce Advisor Server, or the Frontline Advisor Server, you must use a Configuration Server connection that *writes* to the Configuration Server (avoid using a read-only–type connection to the Configuration Server). The preceding components use the Configuration Server connection properties that you supply during the Advisors Platform installation; these components must be able to write to the Configuration Server to function correctly.
	In a Genesys environment, you have established connection to the Genesys Solution Control Server and to its backup if there is one.
	You have initialized databases—databases must be present and at the current version prior to running the installation files. You have configured accounts that can be used by applications to access the databases.
	Each application server and its associated database are in the same time zone, and the time is synchronized. (The client can be in a different timezone.)
	You have configured the Advisors User account in the Genesys Configuration Server. For more information see Creating the Advisors User.
	You have configured the Object Configuration User in the Genesys Configuration Server. For more information, see Data Manager.
	You have installed JDK on the server on which you will be deploying Advisors Platform.
	If you plan to connect to the Configuration Server using TLS, you have configured a secure port for Genesys Configuration Server. For more information, see Genesys 8.1 Security Deployment Guide.
	If you plan to connect to the Configuration Server using TLS, you have configured security certificates: • You have configured the security providers and issue security certificates. For more information, see Genesys 8.1 Platform SDK Developer's Guide. • You have assigned a certificate to the Configuration Server host in Configuration Manager. For more information, see Genesys 8.1 Security Deployment Guide.
	On the system on which you are installing Advisors Platform, you have set the Regional and Language options to the locale for which you want the servers to be deployed.

Y or N	Prerequisite
	If you are going to use two different deployments of Advisors on the same machine, then you have chosen different values for the port numbers that each deployment will use. See Multiple Advisors Deployments on One System.
	You have located the `advisors-platform-installer-<version>.jar` file on the installation CD and have copied it to the local drive of your server. **[+] Show additional information for Linux environments** 1. You can start the installer locally or from a remote desktop. To run the installer remotely, use SSH with X11 forwarding enabled: `ssh -X root@<host>` 2. As root, place the `advisors-platform-installer-<version>.jar` file into the Advisors home directory.
	You have created the required Application and Host objects in Genesys Administrator or Configuration Server for any server on which you will install the administration module. 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 Deploying Components Controlled by Solution Control Server for information.

	If you are deploying Advisors Platform on a Linux system, you must first create the Advisors group and user. The Advisors Platform is run as the *advisors user*, which belongs to the *advisors group*.
	[+] Show Steps
	
	1. Open the shell.
	
	2. As root, create the Advisors group:
	
	`groupadd advisors`
	
	3. As root, create the Advisors user in the Advisors group:
	
	`useradd -s /bin/bash -g advisors advisors`
	
	The preceding command creates the /home/advisors directory. If you want a different directory, you can use the following command:
	
	`useradd -g advisors -d <path to the desired directory> advisors`
	
	You can optionally set a password for the Advisors user:
	
	`passwd advisors`
	
	Genesys recommends that you mount /home as a separate partition.

Y or N	Prerequisite

	Install Oracle Java Development Kit (JDK).
	[+] Help with Linux environments
	
	1. Download the latest version of an Advisors-supported Oracle JDK from http://www.oracle.com/technetwork/java/javase/downloads/index.html The correct file is an archive binary file (.tar.gz). In the following Steps of this procedure, JDK 7 is used as an example. Ensure you enter the correct version number of the Oracle JDK you use in your installation.
	
	2. As root, navigate to the directory that has the downloaded Oracle JDK and copy the Oracle JDK archive binary file to the Advisors home directory:
	
	`cp ./jdk-7u<version>-linux-x64.tar.gz /home/advisors`
	
	3. Navigate to the Advisors home directory:
	
	`cd /home/advisors`
	
	4. As root, unpack the archive and install the JDK:
	
	`tar zxvf jdk-7u<version>-linux-x64.tar.gz`
	
	5. As root, change the owner of the installed JDK:
	
	`chown -R advisors:advisors jdk1.7.0_<version>`
	
	6. As root, change to the Advisors user and test JDK:
	
	`su - advisors`
	
	`./jdk1.7.0_<version>/bin/java -version`
	
	You should see output similar to the following:
	
	`java version "1.7.0_40"`
	
	`Java(TM) SE Runtime Environment (build 1.7.0_40-b43)`
	
	`Java HotSpot(TM) 64-Bit Server VM (build 24.0-b56, mixed mode)`

	If you use Management Framework 8.1.x in your enterprise and you will allow users to modify their Advisors login password, you have changed the following two options in Management Framework to true to avoid potential lockouts: • the no password change at first login option • the override password expiration option For information about the no password change at first login and override password expiration options, see Genesys Framework 8.1 Configuration Options Reference Manual.

Y or N	Prerequisite
	Important After you install the Advisors applications, you must also ensure you assign the `Advisors.ChangePassword.canView` privilege to all users. Performance Management Advisors support Genesys Management Framework Release 8.1.x, but do not fully support the password security authentication options available in Management Framework. Users can be locked out of the Advisors interface if you use Genesys Management Framework 8.1.x in your enterprise and do not change the preceding Management Framework options to `true` and fail to assign the `Advisors.ChangePassword.canView` privilege to all users.

Collect Information

During deployment of Advisors platform, the installer prompts you for the information in the following Table. Default values provided by the installer are entered in the Table.

Information	Input
Are you installing the Advisors Administration on this system with this installation of Platform?	
Language(s) to use in email notifications from the system, and the default metric name and description language.	

Location and name of the base directory in which you will install Advisors.	Default on Windows:
	
	`C:\Program Files\GCTI\Advisors`
	
	Default on Linux:
	
	`/opt/gcti/advisors`

Location of the Java Development Kit (root directory).	
Port numbers that the Geronimo application server will use. If you are not going to install two different deployments of Advisors on the same machine, use the default values the installer supplies. See Multiple Advisors Deployments on One System for more information.	Default values are: • HTTP port: 8080 • HTTPS port: 8443 • AJP port: 8009 • JMX port: 9999 • Naming (JNDI) port: 1099
This section applies if you are installing the Administration module. You require the name, in Configuration Server, of the primary Solution Control Server Application that you will use with Advisors.	Default value is SCServer.
This section applies if you are installing the Administration module. From the Configuration Server, you require: • the name of the XML Generator application • the port number on which that application listens	Default value for both port numbers is 8090.

Information	Input
• the name of the host associated with that application If you are deploying Advisors in a warm standby configuration, then you require this information for both the primary and backup XML Generator applications.	
Node ID for this server in the Advisors cluster. Use letters, numbers, or the dash character. Maximum 16 characters. For more information see Advisors Cluster Information.	
The IP address or host name that other cluster members will use to contact this node (not `localhost` or `127.0.0.1`)	
The port number the members of the cluster will use to communicate. If you are not going to install two different deployments of Advisors on the same machine, use the default value the installer supplies. See Multiple Advisors Deployments on One System for more information.	Default value is 61616.
The local host address (`localhost` or `127.0.0.1`)	
The port numbers used for communication by the cluster's distributed cache. If you are not going to install two different deployments of Advisors on the same machine, use the default values the installer supplies. See Multiple Advisors Deployments on One System for more information.	Default values are 11211 and 11212.
Details to connect to the Genesys Configuration Server: • 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. • The name or IP address of the machine that hosts the Configuration Server • 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. • The name of the application that Advisors Platform will use to log in to the Configuration Server (for example, `default`) • The user name and password of the account that Advisors Platform will use to connect to the Configuration Server. This is the *Advisors User* account (see Create the Advisors User Account for information). **NEW** If you are later going to deploy one of the following modules on this system, then the connection to the Genesys Configuration Server must have permission to change applications and agent groups in the Configuration Layer: • CCAdv XML Generator • Workforce Advisor Server • Frontline Advisor Server (with the rollup engine) • Resource Management Console Additionally, if this is a server on which you will later deploy CCAdv XML Generator, Workforce Advisor Server, or the Frontline Advisor Server, you must use a Configuration Server connection that *writes* to the Configuration Server (avoid using a read-only–type	Defaults are: • Configuration server name: confserv • Configuration server port: 2020 • Application name: default

Information	Input
connection to the Configuration Server). The preceding components use the Configuration Server connection properties that you supply during the Advisors Platform installation; these components must be able to write to the Configuration Server to function correctly. If you will connect to the Configuration Server using TLS, then you also require the following information: • The TLS port number for the Configuration Server. • The location of the TLS properties file. If you use a backup Configuration Server, you require the following information, as well: • The name of the backup Configuration Server (the Application name, obtained from Genesys Administrator). • The name or IP address of the machine that hosts the backup Configuration Server. • The port on which the backup Configuration Server listens.	
The name of the Object Configuration User account (configured in Configuration Server). See Create the Data Manager Base Object Configuration User for information.	
Will you synchronize user updates between the Configuration Server and the Advisors database? To synchronize user updates, an installation must include the Administration module.	
The name of the default tenant in the Configuration Server under which the Advisors metadata is maintained. 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 Platform server. Within one Advisors suite, the Platform server for CCAdv/WA and the Platform server for FA can share the same default tenant, but different suites cannot share the same tenant.	
Will you enable **Forgot your password?** functionality (that is, allow password modification)? If you enable it, you can control user access to it with role-based access control.	
Type of database used in your enterprise (MS SQL or Oracle), and connection details: • The host name, IP address, or named instance of the server for the Platform database. • Port number that the database listens on (you do not require this information if the server is a named instance). • The Platform database name (the Service name for an Oracle installation). • The Platform database username and password associated with the account that Advisors Platform will use to access the Platform database. • For clustered databases, the location of the file that contains the	Default values for port number: • Oracle: 1521 • MS SQL: 1433

Information	Input
advanced database connection string. If you do not know how to correctly build the advanced database connection string, contact your database administrator. • For an Oracle installation, the location of the JDBC driver.	
(Optional) If you have enabled the **Forgot your password?** functionality, you require the following details for the SMTP (mail) service that you will use to send the notification messages: • SMTP server host name or IP address • The address from which to send application notification e-mail • The address to which to send application notification e-mail	