GENESYS™

Performance Management Advisors Deployment Guide

Deployment Summary

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Deployment Summary

The basic sequence of events for deploying Genesys Pulse Advisors is shown below. This sequence is repeated throughout the book to help you understand where you are in the deployment process.

Advisors integrate with the Genesys Management Layer. The deployment summary below is specific to Advisors deployment; it assumes that you have installed the Local Control Agent (LCA) on any servers that require it, and that you have configured your Application and Host objects. During the deployment of the Advisors components, some installers will prompt you for information about Applications, Hosts, LCA, and the Solution Control Server (SCS).

You configure Stat Servers as connections to the Advisors Genesys Adapter (AGA) Application object in the Genesys Configuration Server. See Manage Advisors Stat Server Instances for information.

See the Prerequisites and the various deployment procedures in Deploying Advisors for detailed information.

Deployment Roadmap

1. Install the databases that correspond to the Advisors products that you will deploy. In Oracle installations, make sure that Advisors Genesys Adapter (AGA) metrics, metric graphing, and Platform users are created with all of the necessary privileges that are listed in the `advisors-xxxx-<version>_Userxxxx.sql` script that corresponds to your release. Delegate the Users creation task or the whole database creation task to your DBA because the user creation task requires elevated Oracle privileges.

   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

   e. If you want the Advisors applications to run as an application user with least privileges instead of a database user-schema owner, and your installation is with Oracle, ask your DBA to review and apply the `advisors-platform-<version>_UsersAndRoles.sql` script. For MS SQL installations and additional information, see the enhanced security setup.

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:

- Contact Center Advisor server (CCAdv XML Generator)

- Workforce Advisor server

- Frontline Advisor server

- SDS and the CCAdv/WA Resource Management console

6. In installations with Oracle, validate the database by executing the `advisors-platform-<version>_ValidateDatabaseInstall.sql` script as the schema owner after you install XML Generator and before you start it. If you do not see this file in your installation package, see the recommendations for Oracle users.

7. Make any required configuration changes.

8. Run the Advisors Object Migration Utility if necessary.

Use the Advisors Object Migration Utility when:

a. 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.

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

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

d. 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*.

e. 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.

Presentation Nodes

The Platform server nodes on which you install Advisors Web Services are called the *presentation nodes*. These are the nodes to which all user requests will be routed. For example, Apache proxy pass redirects are expected to be routed primarily to these presentation nodes. Installing Advisors Web Services is sufficient to enable all of the Advisors dashboards (that is, the Contact Center Advisor, Workforce Advisor, and Frontline Advisor dashboards).

On these presentation nodes, you can install optional additional services such as the Metric Graphing service, the CCAdv/WA/FA accessible dashboards, or the Resource Management console.

Server Nodes

When you install the WA Server or FA Rollup engine server on the Platform server nodes, the nodes are called *server nodes*.

> ### Important
>
> XML Generator can be installed either on a separate folder or under an existing Platform server installation. In either of those deployments, XML Generator is a separate process from the Platform server process. The only commonality of installing XML Generator on the same folder as the Platform server is sharing of the configuration files between them.

For performance reasons, Genesys recommends that you avoid installing the server components (WA Server or FA rollup engine) and the Advisor Web Services on the same Platform server node.