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Performance Management Advisors Deployment Guide

[Create the Advisors User Account](#)

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Create the Advisors User Account

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.

Deployment Roadmap

The arrow icon in the following roadmap indicates where you are in the Advisors deployment process.

1. Install the databases that correspond to the Advisors products that you will deploy. 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

[+] REVIEW IMPORTANT INFORMATION HERE

If the Oracle Platform deployment script issues the following error, ORA-20001: spCreateOneSourceView ORA-01031: insufficient privileges, and you are sure that the Platform user has been issued all necessary privileges, then you might have role-based Oracle security set for the Platform user by your DBA. Make sure you take the deployment script from the **current_user** sub-folder in the installation package. You can apply the correct script on top of the one that you applied previously, ignoring the exceptions about existing objects and primary key violations. Alternatively, you can ask your DBA to recreate the user and the privileges and apply the correct script.

If your installation package does not contain a **current_user** folder, edit the following scripts by replacing all entries of DEFINER with CURRENT_USER and repeat the database deployment process.

- If initially you used advisors-platform-<version>_Schema.sql or advisors-platform-<version>_ObjectsPlus.sql, edit these scripts:
advisors-platform-<version>_CUSTOM_ROUTINE.sql
advisors-platform-<version>_PIMPORT_xxx.sql
advisors-platform-<version>_Routine1.sql
- If initially you used advisors-platform-<version>_ObjectsCustom.sql or advisors-platform-<version>_ObjectsDefault.sql, this would be the only script to edit.

If you prefer, you can contact Genesys Support to obtain the edited scripts.

Alternatively, you can set up the enhanced Oracle security to run Advisors applications as an application user with least privileges. For instructions, see [Least Privileges: How to Configure Advisors Database Accounts with Minimal Privileges](#).

If necessary, run the Advisors Object Migration utility. You must run the Advisors Object Migration utility when:

- 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.
- If any of the required Business Attributes folders that Advisors components use are not already present in the Configuration Server.
- If you decide to enable metrics that are not yet present in your Configuration Server.
- 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*.

- 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.
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. Make any required configuration changes.

Tip

You might need to use Configuration Manager to configure some of the permissions described in the following Table; it might not be possible to configure everything listed below in other Genesys configuration interfaces (Genesys Administrator or GAX).

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.

Starting with Advisors release 9.0, the **Base Object Configuration** page no longer exists in the Advisors administration module. Therefore, the following table of Advisors User account permissions has been updated; you no longer require additional permissions related to configuration on the **Base Object Configuration** page.

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. Change permission is required so the installers can update properties of Application objects that correspond to Advisors servers.
Hosts folder	Read	Read permission is required on the Hosts folder so that the

Object	Permissions	Notes
		hosts on which Solution Control Server is deployed can be read from the Configuration Server.
Adapter Application object(s)	Read, Change	Starting with release 8.5.2, permissions on the adapter Application object are required for adapter-Stat Server communication. These permissions also allow the migration wizard to update properties in both the adapter Application object and the Stat Server Application object. See Manage

Object	Permissions	Notes
		Stat Server Instances for more information about the Advisors Stat Server configuration.
Stat Server Application object(s)	Read, Change	The Change permission is required starting in release 8.5.2. The migration wizard connects to the Configuration Server in order to update the properties in both the adapter Application object and the Stat Server Application object. See Manage Stat Server Instances for more information

Object	Permissions	Notes
		about the Advisors Stat Server configuration.
Tenants	Read	
*Agent Groups	Read	Required for CCAdv and WA Choose only the sets of objects that you might want to monitor in CCAdv or WA.
Switches	Read	
*DNs (of type ACD Queues and Virtual Queues)	Read	Required for CCAdv and WA
*DN groups	Read	Required for CCAdv and WA
	Read, Read Permissions	
Persons	Change	Required only in the following circumstances: to allow users to change their password using the

Object	Permissions	Notes
		Change Password functionality if the Resource Management Console will be used to modify agent skills (the Change permission is required to save the agent skill changes)
Skills	Read	Read permission is required to view skills in the Resource Management Console.
*Objects in the Scripts folder (of type Interaction Queue)	Read	Required for CCAdv
Access Groups	Read, Read Permissions	
*Campaigns	Read	Required for CCAdv
*Calling lists	Read	Required for CCAdv
Roles	Read, Read Permissions	Used to determine

Object	Permissions	Notes
		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.
Folders in Persons	Read, Read Permissions	Required for FA. Read Permissions is necessary to control end users' permissions to see the agent hierarchy.
Folder in Agent Groups	Read, Read Permissions	Required for FA. The folder content should represent the FA hierarchy. Read Permissions is necessary to control the end users'

Object	Permissions	Notes
		agent hierarchy.
SDS Application	Read, Change, Read Permissions	Only required if you deploy Supervisor Desktop Service.

*You may exclude the following Advisors-supported object types from Read access as a whole, or exclude individual objects within any object type, if any of these objects do not need to be monitored in Advisors:

- Agents (Persons)
- Agent Groups
- ACD Queues
- Virtual Queues
- DN Groups
- Calling Lists
- Interaction Queues

In the Configuration Server, under **Agent Groups**, if the folder that you choose for FA does not need to be monitored in CCAdv/WA, then create a separate Advisors account for FA and enter that account when you install the FA component.