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Performance Management Advisors Migration Guide

Advisors Features by Release

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Advisors Features by Release

This section summarizes the significant enhancements in the Genesys Pulse Advisors suite for each release. For detailed information about the Advisors features and functionality in each release, see the Pulse Advisors (formerly Performance Management Advisors) [documentation set](#).

Introduced in Release 9.0.0

- Customers concerned with Adobe Flash vulnerabilities can now run the Advisors administration module as a desktop client application, instead of using the existing Advisors administration web application that requires Flash. Contact your Genesys representative to request the administration module client application.
- The Object Configuration user is now obsolete; you no longer create this user account. The installation wizards no longer prompt you for the Object Configuration user account name.
- To simplify Advisors configuration, the following changes have been made to the Advisors administration module:
 - The **Genesys Adapters** page has been removed from the Advisors administration module. You can query currently-installed adapters directly from the database, if needed.
 - The **Base Object Configuration** page has been removed from the administration module. All CCAAdv/WA agent groups and applications are now directly configurable on the **Application Configuration** page. Objects are now loaded into the administration module and are listed as available for application configuration and the mapping of agent groups.
 - There are changes to the regions, application groups, and contact centers configuration. When these objects are imported into Advisors from the Configuration Server for the first time, all regions and application groups are set to the "Active" state by default and all contact centers are preconfigured and set to the "Active" state. For more information, see [Application Groups and Thresholds](#), [Regions](#), and [Contact Centers](#).
 - For CCAAdv/WA, only applications that you have configured in the application rollout can be mapped to agent groups.
 - For CCAAdv/WA, statistics requests are processed along with the process of configuring applications. The statistics requests are sent when you add an application to the application rollout. For more information, see [Application Configuration](#).
 - For CCAAdv/WA, agent group statistics requests are processed along with the process of configuring application-agent group relationships. Statistics are requested for an agent group as soon as the agent group is assigned to a configured application. For more information, see [Applications – Agent Groups tab](#) and [Agent Group Configuration](#).

If you currently have an Advisors installation with objects configured for your environment, no reconfiguration is necessary when you upgrade to release 9.0. The migration procedures will manage the reconfiguration of object configuration data.
- You now configure an object filter as an Annex option on the filter attribute value. You enter the filter expression in the **Option Value** field when you create the filter option. You can also add a **NameFormat** option to control the filter's display name for presentation purposes. For information, see the [Application Configuration](#) page in the *Genesys Contact Center Advisor and Workforce Advisor*

Administrator User's Guide.

For migrated installations, you must run the migration wizard in order to move existing filter definitions to the Annex section in Configuration Server. Use the **Reconfigure Advisors Filters Business Attributes** option on the migration wizard.

- Changes have been made to bulk configuration. Application and agent group names no longer need to be presented in the form of concatenated tenant name, base object name, switch name, and filter name; that is, [tenant name] [base object name or number] / filter name@switch. Instead, the bulk configuration structure contains separate fields for what was previously the parts of the concatenated object names. The **Application Name** and **Agent Group Name** columns should now only contain the base object name or number as it appears in the Configuration Server. The tenant name, switch name, and filter name are added if applicable or necessary. Applying the 9.0. bulk configuration object creation script to a Platform database that has bulk configuration tables containing the concatenated names used in the previous versions will transform the names as required in release 9.0.
- You can now enable and disable the browser console debug logging for the Advisors user interfaces. The debug logging is turned off by default. You can turn on the console debug logging for the UI by appending the `?adv.debug.on=true` parameter to the URL, and then turn it off again by appending the `?adv.debug.off=true` parameter.
- You can now view the Contact Center Advisor (CCAdv), Workforce Advisor (WA), and Frontline Advisor dashboard data on your mobile device. You can view the full desktop dashboard on your mobile device, if necessary, but the dashboards are available as an optimized view that is intended specifically for mobile device users. For information, see the [Genesys Contact Center Advisor and Workforce Advisor Help](#) and the [Genesys Frontline Advisor Help](#).
- In installations with Oracle, the script has changed that grants Select privileges to the Platform user on views contained in the Advisors Genesys Adapter metrics views. If you are performing a clean Advisors installation, see the [Configure Oracle Metrics Data Sources](#) page in the *Genesys Pulse Advisors Deployment Guide* for more information. If you are migrating to release 9.0 from the previous Advisors release, also see the [Pulse Advisors Migration Procedure – 9.0 Releases](#) page in this Guide.
- In installations with SQL Server, the following server-level collations are supported:
 - **Latin1_General_CI_AS**
 - **SQL_Latin1_General_CP1_CI_AS** (for compatibility with older installations)

The collation of the server and the collation of the database can be different as long as you use one of the preceding collations for each.
- Using the Metric Manager, you can now create Calling List custom metrics based on the Stat Server Outbound Contact Java Extension (OCCStatExtension).
- The following changes have been made to the Advisors Platform Installation Package:
 - The structure of subfolders has been rearranged in the platform-database-sql/oracle folder. The content description is in the WhatsInThisFolder.txt file. The archive folders contain adjusted scripts for older versions. They are included for use in migrations that involve database versions older than 9.000.06.
 - The **database validation script** that Genesys recommended for use with previous releases is now added to the Advisors Platform Installation Package. The advisors-platform-<version>_ValidateDatabaseInstall.sql script becomes part of the installation/migration process and you must apply it after all application components are installed and before they are started for the first time.
 - There are new ReadMe files included in the Advisors Platform installation package. The content of all Oracle folders and subfolders is described in the WhatsInThisFolder.txt file. The WhatFolderToUse.txt file explains how to decide which folder to use (definer or current_user)

when creating or migrating Oracle databases. The two folders, as well as the `WhatFolderToUse.txt` file, are included in the following three subfolders: `oracleJServer`, `oracleNoJServer`, and `migration`.

- Support has been added for OpenJDK 8. See the Prerequisites section on the [Pulse Advisors](#) page in the *Genesys Supported Operating Environment Reference Guide* for more detailed information and a list of all prerequisites.
- Starting with release 9.0.001.06:
 - Contact Center Advisor contains a default rollup configuration. In new Advisors installations, all base objects to which the Advisors user has access display as already assigned to a default Advisors hierarchy; the CCAdv dashboard starts showing the metadata and the real-time data on the initial start of the application. The new CCAdv automated rollup configuration method is turned on by default in installations where the database is newly created using the new database creation scripts. For information, see [Contact Center Advisor Default Rollup Configuration](#) in the *Contact Center Advisor/Workforce Advisor Administrator User's Guide*.
 - The independent configuration mode is now the new default configuration mode for Workforce Advisor. Previously the integrated configuration mode was deployed as the default mode.
 - The default storage location for log files changes. For information about log files, including the default log file storage locations, see [Adjust Logging Settings](#) and [Configure Administrative Actions Logs](#) in the *Genesys Pulse Advisors Deployment Guide*.
 - The URL to request a health check of the Advisors Web Services changes to `http://<host:port>/adv/health</host:port>`. Previously, the URL was `http://<host:port>/adv/rest/health</host:port>`. For additional information, see [Health Check API for the Platform Web Services Node](#) in the *Pulse Advisors Deployment Guide*.
- Starting with release 9.0.002.03:
 - You require Chrome version 66.0+ to run the Advisors user interfaces. Related to this, you can no longer use the Chrome browser on Windows Server 2008 to run the Advisors user interfaces. Windows Server 2008 support for Chrome ends with Chrome version 49.0 and the Advisors user interfaces require, as a minimum, Chrome version 66.0.
 - Dashboard performance was improved. Dashboards load into the browser faster than they did in previous 9.0 releases and are quicker to respond to user activity (better response time for dashboard rendering), even in large configurations and in any supported browser.

Introduced in Release 8.5.2

- The Advisors Platform installation wizard now includes the option to install Advisors Web Services. 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 are routed. Installing the Advisors Web Services is sufficient to enable all Advisors dashboards (Frontline Advisor, Contact Center Advisor, and Workforce Advisor).

When you install the WA Server or FA rollup engine server on the Platform server nodes, then the nodes are called *server nodes*. For performance reasons, Genesys recommends that you keep the presentation nodes distinct from the server nodes. That is, install the Advisors Web Services and the server components (WA Server or FA rollup engine) on separate Platform nodes.
- The new Advisors Web Services provide an API to check the health of the web server nodes. For example, the load balancer might access an `/adv/rest/health` URL to check the health of an Advisors Web Services node. This is an unauthenticated resource; it can be accessed without first logging in. The service returns an HTTP status code of 200 when the Web server is up and running. The service returns

a non-200 HTTP status code when the Web server is not reachable.

- The server-log4j.properties file has been renamed to log4j.properties, and is found in the <Advisors>/conf directory. All Tomcat logging and logging for all Advisors modules (CCAdv/WA/FA) is configured in this file.
- Performance is improved for redundant configurations that use multiple instances of queues that are registered under different switches.
- Support for MS SQL Server 2016 Cluster. See the [Supported Operating Environment Reference Guide: Performance Management Advisors](#) page for more detailed information and a list of all supported databases and database clusters.
- Support for Platform SDK 8.5.
- Support for Apache Tomcat 8. Tomcat version 8.5.23 is packaged with Advisors Platform.
- Support for Java 8 (that is, version 1.8). See the [Supported Operating Environment Reference Guide: Performance Management Advisors](#) page for more detailed information and a list of all prerequisites. Note that Java version 1.7 is no longer supported starting with release 8.5.2. See the Advisors deployment procedures in the *Genesys Performance Management Advisors Deployment Guide* for related updates.
- Support for Red Hat Enterprise/CentOS Linux 7 operating system. Advisors components support 64-bit native mode. See the [Supported Operating Environment Reference Guide: Performance Management Advisors](#) page for more detailed information and a list of all supported operating systems.
- Support for Oracle 12c Release 2. You require the ojdbc8.jar driver for Release 2.
- Support for the Oracle 12c Database In-Memory option.
- Support for MS SQL Server 2014/2016 memory-optimized tables.
- Support for Real-Time Metrics Engine 8.5.103.xx.
- Support for Microsoft Edge browser.
- Support for SAML 2.0 Single Sign-On (SSO). Users can authenticate once with their corporate SSO system, and then switch between Genesys products without having to enter their credentials again. In particular, users of both Genesys Pulse and Advisors can switch between the two applications without having to log into each separately.
- New screens have been added to the Advisors Platform installation wizard to accommodate the following new features:
 - You can now specify the authentication option that will be used in your deployment. You can continue to use the existing Configuration Server-based authentication system or you can select the SAML Single Sign-On (SSO) login process. Note, however, that the Resource Management Console and the "Change Password" and "Forgot Password" functionality are not supported with the SSO login process.
 - You now have the option to specify the URL for your Genesys Pulse installation. Entering the Pulse installation URL adds a link to Pulse in the navigation bar of each Advisors dashboard.
- You can now configure the connectivity between Advisors applications and Oracle databases to use the Oracle Call Interface (OCI). For existing installations where the connectivity uses the Oracle thin JDBC driver, see the *Genesys Performance Management Advisors Deployment Guide* for the procedure to update the connection to use the OCI.
- Database connections support TLS 1.2 (tested with MS SQL Server installations only).
- You can now configure secure TLS connections between Advisors Genesys Adapter and Stat Servers.
- For security purposes, you can separate the database accounts used by DBAs to create Advisors

databases and database objects from the database accounts used by Advisors modules to access and manipulate data at runtime. The *Genesys Performance Management Advisors Deployment Guide* now includes information and recommendations about scenarios in which you can configure Advisors database accounts to use a minimal set of privileges.

- You now configure Stat Servers as connections to the Advisors Genesys Adapter (AGA) Application object in the Genesys Configuration Server. See the *Genesys Performance Management Advisors Deployment Guide* for more information.
- The Advisors migration wizard has been updated to reflect the change in connection configuration between Stat Servers and AGA. When upgrading to Advisors release 8.5.2, you can use the migration tool to export the existing AGA-Stat Server configuration, stored in the Platform database. This automatically configures the connections to the respective AGA Application objects. See the *Genesys Performance Management Advisors Deployment Guide* for more information.
- In a multi-tenant Configuration Server environment, you no longer need to link each Advisors Stat Server to all tenants in the Configuration Server. You can now link a Stat Server to one tenant in the Configuration Server and the statistics will be routed correctly to that Stat Server. This configuration can sometimes help to reduce the load on the Stat Servers.
- The Frontline Advisor supervisor dashboard has been re-designed. Changes to the dashboard include the following:
 - There is now one pane in which to view detailed information about alerts, the **Team Alerts** pane. The **Team Alerts** pane provides all the information that was previously distributed between the **Agent Alerts** and **Team Alerts** panes.
 - You can now pause the dashboard. This preempts automatic data updates until you press the **Play** button to resume the data flow.
 - The dashboard toolbar includes a Data Connection status indicator. The status indicator changes color when you click the **Pause** button on the toolbar, or when there is a problem with connectivity.
 - The dashboard displays a timestamp in the toolbar, which indicates when dashboard data was last updated. Under normal circumstances, the Frontline Advisor dashboard receives data at regular intervals, however, the timestamp changes only when there is new data to display on the dashboard. Users can check the timestamp to determine when updated data was last received. You can use the timestamp to determine the health of the data source, as well. If the timestamp does not update in a long time, check the data source to make sure that it is working correctly.
- Improvements made to the Advisors Web services make it unnecessary to run FA Web services in the single instance, non-distributed mode. As a result, the FA deployment wizard no longer prompts you to choose between a "single instance" or "distributed mode" deployment.
- A configurable setting has been added to the FA accessible dashboard, which limits the number of agents, teams, and levels that can be displayed. The limit defaults to 1000.
- The Contact Center Advisor and Workforce Advisor dashboards have been re-designed. Changes to the dashboards include the following:
 - The dashboards now include an **Alerts** pane in which to view detailed information about alerts. This replaces the **Alerts** pop-up window. The **Alerts** pane provides all the information that was previously available in the **Alerts** window. The **Alerts** pane replaces the **Map** pane of earlier releases.
 - The dashboards now include a **Library** drop-down menu in the toolbar for users who have access to Column Chooser. Users can use the drop-down menu to switch between saved metrics libraries without having to launch the Column Chooser window.
- You can now configure DN Groups as applications for use in Contact Center Advisor/Workforce Advisor (CCAdv/WA). DN Groups provide an aggregated view of the underlying queues. Consider the use of DN Groups as applications for CCAdv/WA in enterprises where it is sufficient to monitor activity at the

"groups of queues" level, rather than drilling down to the individual queue level. In enterprises that have a very large number of queues, configuring DN Groups as applications, instead of queues as applications, can reduce the administrative maintenance effort and can improve system performance.

- This release includes the following improvements to the CCAAdv/WA bulk import and export tool:
 - In releases prior to release 8.5.2, the bulk configuration tool required the presence of the business hierarchy objects (regions, operating units, application groups, and contact centers) in the Advisors configuration. You had to first add the business hierarchy data to the Genesys Configuration Server's Business Attributes folder, and then manually activate those objects in the Advisors administration module. Starting with release 8.5.2, none of that is necessary prior to using the bulk configuration tool; the bulk configuration tool now has a business hierarchy bulk configuration feature.
 - The bulk configuration data now includes the Service Level Threshold property for applications. With this addition, the bulk configuration tool covers all application, contact group, and agent group properties that are available in the Advisors administration module.
 - The bulk export tool can now export service level thresholds.
 - The bulk configuration export tool can now export the geographic regions that are required for bulk contact center configuration.
- WA now supports Genesys Workforce Management Server release 8.5.2.
- The accessible dashboards are no longer invoked from the user dashboards. To reach the accessible dashboard, enter its URL into the browser, as documented in the *Genesys Performance Management Advisors Deployment Guide*.

Introduced in Release 8.5.1

- The following Advisors modules are now integrated with Genesys Solution Control Server (SCS):
 - Advisors Genesys Adapter (AGA)
 - Advisors Cisco Adapter (ACA)
 - Contact Center Advisor (CCAAdv) XML Generator
 - Workforce Advisor (WA) Server
 - Frontline Advisor (FA) with the rollup engine

The Windows and Linux services that previously controlled the preceding components have been removed.

Advisors supports warm standby high availability for the modules that are integrated with SCS.

- Advisors Cisco Adapter (ACA) release 8.5.100.09 is the final release for this Advisors component. ACA release 8.5.100.09 is fully supported with Advisors release 8.5.1; that is, ACA is compatible with all 8.5.1 releases of FA, up to and including release 8.5.102.
- You now execute dedicated database procedures against the Advisors Platform database to:
 - register or remove Stat Server instances
 - add, edit, or remove Stat Server configuration settings related to Advisors

You can run the stored procedures whenever necessary. You perform Stat Server configuration adjustments after deployment – that is, after you have run the installers.

- The Source Metrics manager shows Interaction-related actions, available in the Main Mask and Relative Mask drop-down menus when you create a new source metric.

- Advisors alert and action management features can accumulate obsolete historical alert and action management report data that the Advisors application never removes automatically. A maintenance procedure is added to the Platform database that can remove the obsolete data based on configurable criteria. A database administrator can schedule a job or execute the procedure manually to periodically delete CCAdv and WA expired alerts, archived FA threshold violations, or purge key action reports that are associated with expired alerts.
- Custom historical chat and email agent group metrics that use the Short, Medium, or Long time profile group, and which you enable, are available in the Column Chooser for display on the CCAdv dashboard. Previously, CCAdv could display only Short email and chat agent group report metrics on the dashboard.
- In FA, updates to the hierarchy are now dynamic. The FA hierarchy is monitored in real time, with structural changes being reflected almost immediately in the dashboards rather than requiring a 24-hour refresh cycle or a manual hierarchy reload.
- Frontline Advisor and Agent Advisor include an Agent Skills metric. Agent Skills is an agent state metric; it is a default raw report metric with no corresponding source metric. The Agent Skills metric provides the list of configured skills for each agent and the skill levels. Use the Skill filter at the top of the Team pane in the supervisor dashboard to filter the list of agents by agent skill.

To support the Agent Skills metric, you must manually add a new business attribute value to the FA metrics list in the Configuration Server:

```
FrontlineAdvisor.Agent.All.AgentSkills
```

- Installer screens related to database connection have been changed. The Basic connection properties for Oracle no longer include SID. Instead, the Oracle service name must be provided. For more flexibility, an Advanced connectivity option is available for both MSSQL and Oracle that allows adding a custom connection string previously prepared in a text file.
- Advisors dashboards support the following browsers:
 - Mozilla Firefox 24.x
 - Microsoft Internet Explorer 10
 - Microsoft Internet Explorer 11
 - Google Chrome 35

Dashboards are available in English, French, or German.

- Support for Genesys intelligent Workload Distribution (iWD) metrics. The supported metrics do not include iWD datamart metrics.
- Advisors now include support for:
 - Microsoft SQL Server Cluster
 - Microsoft SQL Server 2012
 - Oracle 12c databases
- Starting with release 8.5.101:
 - The AGA, CCAdv XML Generator, FA, and WA applications support the Advanced Disconnect Detection Protocol (ADDP) connection to Genesys Solution Control Server (SCS). ADDP is now the default connection type between SCS and the Advisors servers.
 - The **Team** pane of the FA supervisor dashboard now includes a **DN** column. The **DN** column shows each agent's extension or ACD position in a voice environment, or, in a multimedia environment, the channel into which the agent is logged. Related to the new column, there is also a new source metric, AgentState, that derives information about the DN or multimedia channel, as applicable, for each logged-in agent. To display agent DN information on the FA supervisor dashboard, you must enable a new report metric, DN (AgentDN), in the Metric Manager (the metric is disabled, by default).
 - FA includes two new privileges, FrontlineAdvisor.SupervisorDashboard.Export.canView and FrontlineAdvisor.AgentDashboard.Export.canView, that control access to the **Print** button. Users to whom you assign the relevant privilege can see and use the **Print** button on their dashboard. The **Print** button does not display on the dashboard for users to whom you have not assigned the appropriate privilege.
 - FA can now display an agent's full first name and last name if the agent's first name is recorded in Genesys Configuration Server.
 - A hierarchy.dynamicUpdate.maxBatchSize property has been added to the FrontlineAdvisor.properties file in the Advisors conf directory. The new property specifies the maximum number of dynamic hierarchy events to process at one time before reconciling these updates with the FA adapter(s). Specifying a maximum ensures that updates are reconciled even when large numbers of events are received continuously. Genesys considers the default value of 1000 to be

large enough to avoid placing excessive load on the FA adapter(s), but you can increase this number if you regularly update more than 1000 objects at once in Configuration Server.

- Subscription to hierarchy updates can be enabled and disabled using the `hierarchy.dynamicUpdate.subscribe` property in the `FrontlineAdvisor.properties` file. Valid values are `true` (enable subscription) and `false` (disable subscription). Reloading of the hierarchy during the scheduled nightly refresh, or through the Administration page, continues to work as previously.
- Starting with release 8.5.101.17, AGA ships with Supervisor Desktop Service (SDS) release 7.6.300.11. The Resource Management Console (RMC) included with AGA release 8.5.101.17 requires SDS release 7.6.300.11 or higher, and is not compatible with earlier releases of SDS.
- Enhancements to RMC:
 - It is no longer necessary to configure RMC users as agents. In other words, RMC users can manage the skills of agents in RMC without being configured as agents themselves. To take advantage of this functionality, you must install SDS 7.6.300.11.
 - You can deploy SDS and RMC on Red Hat Enterprise Linux. See the [Genesys Supported Operating Environment Reference Guide](#) for information about supported operating system versions.
 - Access to agents and agent groups in RMC is more accurately controlled by user permissions saved in Genesys Configuration Server. Read permissions to agent groups and agents, granted in the Configuration Layer, now extend control to the RMC filtering window, as well as the agent list displayed in the RMC panes. For detailed information, see [Configuring RMC Users in the Genesys Configuration Layer](#) section in the *Genesys Contact Center Advisor and Workforce Advisor Administrator User's Guide* and [Agent Groups in the RMC Filter](#) in the *Genesys Contact Center Advisor and Workforce Advisor Help*.
 - If your deployment includes RMC, you must assign a value to a new configuration parameter for JMS messaging. The `ActiveMQ.properties` file in the `Advisors/conf` directory now contains the `advisors.user.auth.event.queue.ttl.secs` property, which has a default value of 1, which is not large enough for RMC to function properly. For detailed information, see the [deployment procedures for SDS and RMC](#) in the *Genesys Performance Management Advisors Deployment Guide*.
 - You can configure the new `expectedNumberConcurrentUsers` parameter for RMC to make the application more specific to the user configuration in your enterprise (the default value is 10).
 - There are two new role-based access control (RBAC) privileges associated with RMC that provide additional task permissions: `Advisors.RMC.ManageAgentSkills.canView` and `Advisors.RMC.ManageAgentStatus.canView`.
- You can specify at what time each Stat Server is to reset the statistics daily (that is, for the One day/Growing time profiles). The configuration is applicable to both CCAdv/WA and FA Stat Servers configured on the respective AGA instances. For more information, see [Configure the Daily Reset Time for Statistics on a Stat Server](#) in the *Genesys Performance Management Advisors Deployment Guide*.
- A new Retrieved Calls metric for agent groups and contact groups has been added to CCAdv/WA. The previously-existing Retrieved Calls metric has been re-named to *Completed Calls*. The new Retrieved Calls metric counts answered/retrieved calls as soon as a call is answered.
- Genesys has enhanced the [CCAdv/WA bulk configuration](#) export utility. You can now use the export utility to generate a copy of your bulk configuration tables from existing application configuration, and the copy contains no redundancies.
- The minimum supported version of the Adobe Flash Player is now 20.0.0.286.
- Support for Genesys Stat Server 8.5.1.
- Support for Genesys Workforce Management (WFM) Server release 8.5.2. See release 8.5.101.15 in the [Contact Center Advisor and Workforce Advisor Release Note](#) for additional information about this support.
- Starting with Workforce Advisor release 8.5.102.01, WA supports Genesys WFM API release 8.0. WFM Server releases earlier than 8.0 are not supported with WA release 8.5.102.01 and later. See release 8.5.102.01 in the [Contact Center Advisor and Workforce Advisor Release Note](#) for additional information about this support.

Introduced in Release 8.5.0

- The Performance Management Advisors (PMA) browser has been removed and replaced with a new thin-

client user interface (supported on Firefox v.24.x+) that provides a single landing page for all Advisors. You can open each module in a separate browser tab. Always check the *Genesys Supported Operating Environment Reference Guide* for information about supported browsers and browser versions for each Advisors release.

- You can have two separate deployments of Advisors on the same machine, each with their own independent configuration and their own databases. The port numbers that Advisors modules use to communicate, previously hard-coded, are now exposed in properties files. The Platform installer now accepts and sets configurable port values for Geronimo. See the Performance Management Advisors Deployment Guide for details.
- In the Administration module, Metric Manager has been improved:
 - The **Source Metrics** page provides a user interface for maintaining statistic-type definitions from Stat Server. You can create custom source metrics for Agents, GroupAgents, Queue, and CallingList objects.
 - The **Report Metrics** page enables you to create custom Contact Center Advisor (CCAdv) agent group metrics and Frontline Advisor agent metrics. In release 8.5.0, you cannot create custom metrics for Workforce Advisor (WA).
- You can reduce the volume of statistics collected, and potentially reduce the number of Stat Servers used, by grouping raw report metrics and configuring metric applicability for source objects in the Configuration Server.
- Advisors Platform now supports a backup Configuration Server.
- The Frontline Advisor Oracle schema/MS SQL database has been removed from the installation. Frontline Advisor data has been moved to the Advisors Platform Oracle schema/MS SQL database.
- You can define metric display names and descriptions in English or German in the Metric Manager. Those names and descriptions are then displayed in the Advisors applications when you choose one of those languages on login.
- Advisors Genesys Adapter supports the Outbound Contact Campaign CallingList object.
- Performance Management Advisors components supported connection to Oracle Real Application Clusters (RAC) starting in release 8.1.4. Advisors now fully support RAC functionality such as High Availability and failover, as well.
- Starting in release 8.5.001, the following features are also available:
 - You can create custom agent group report metrics using capacity rules. Capacity rules define an agent's ability to handle multiple, simultaneous interactions of differing media types on both single-media and multimedia DNs. These custom report metrics can track:
 - maximum interactions
 - routable interactions
 - current interactions
 - You can configure the prefix to be used as part of the internal short name for custom report metrics. Previously, Advisors created an auto-generated short name that used the CM prefix, which you could not change.
- In the Metric Manager, you can search by metric name or description in German, as well as English, regardless of the language option you selected at login.
- You can place point-in-time metrics in a time profile group: Short, Medium, or Long. Previously, point-in-time metrics were displayed on the dashboard independently from the time profile group selection.
- You can enable or disable FA report metrics by time profile using the Report Metrics manager. You

continue to use the FA time profile configuration field in the FA administration Settings tab to configure the time profile durations, as well as to disable a time profile at the FA module level.

- You can configure whether or not the Time in Reason code part of the Reason code metric displays on the dashboard.
- The *Performance Management Advisors Deployment Guide* includes information about how to use Advisors in a Cold Standby mode of operation. Cold Standby is a form of High Availability.
- Performance Management Advisors release 8.5 supports the following versions of Genesys Management Framework and Stat Server:
 - Release 8.5.000 supports Genesys Management Framework up to, and including, release 8.1.3.
 - Release 8.5.001 supports Genesys Management Framework up to, and including, release 8.5.
- Performance Management Advisors support the following:
 - Release 8.5.000 supports Stat Server up to, and including, version 8.1.2. Advisors release 8.5.001 adds support for Stat Server version 8.5.
 - Genesys Workforce Management 8.1.2
 - Java SE Development Kit 7
 - Red Hat Enterprise Linux 6.0 64-bit native
 - Windows 8 64-bit Native
 - Windows Server 2012 64-bit native
 - Apache 2.4

Introduced in Release 8.1.5

- Starting in Release 8.1.5, permissions for user accounts are loaded when users log in to the Advisors browser. This affects the availability of objects in the browser:
 - In general practice, if a user is logged in to the Advisors browser, and a new object is added to Genesys Configuration Server, it is not added to the user's view until that user logs out and logs in again (if the user has the necessary security permission to view the object). The reverse is also true: when a user's access to an object is removed while that user is logged in, access to the object is not revoked until the user logs out and logs in again.
 - To see objects that were activated or removed in Advisors after the user logged in, that user must log out and log in again.
- Performance Management Advisors format numbers that display on the dashboard modules based on the language you selected in the Advisors browser, regardless of the system setting for Locale on the server. For example, if you log in to the German-language Advisors browser, but the system setting for Locale on the server is English, the numbers on your Advisors dashboard are formatted in the German style. Prior to Release 8.1.5, the number format depended on the Locale setting on the server.
- The following general changes have been made to the navigation pane in the Administration module:
 - The Frontline Advisor Administration component is embedded in the Advisors Administration component, consolidating administration of CCAAdv, WA, and FA within one Administration module in the Advisors browser. To access the Frontline Advisor page in the Administration module, you must have access permissions to both Frontline Advisor Administration

(FrontlineAdvisor.Administration.canView) and Advisors Administration (AdvisorsAdministration.canView).

- The Object Configuration page in the Administration module is now the Base Object Configuration page, and is no longer included in the Genesys Adapters section of the navigation pane.
- The Manage Adapters page is read-only.
- The navigation link to the Agent Group Configuration page is moved below the links to the Application and Contact Group Configuration pages.
- The layout and content of the Agent Group Configuration and Contact Group Configuration pages have been updated; the contact center column and the contact center drop-down list now show the network contact center (NCC) name with the agent group contact center (AGCC) name, and uses the format NCC:AGCC.
- Performance Management Advisors support Genesys Management Framework up to, and including, Release 8.1.3.
- An additional configuration mode is added to Contact Center Advisor (CCAdv) / Workforce Advisor (WA), which enables you to implement WA configuration that does not depend on the existence of CCAdv configuration or CCAdv object mappings. The Administration System Configuration page contains a new option for CCAdv/WA configuration mode, which you can set as follows:
 - yes: for Integrated CCAdv/WA Configuration mode
 - no: for Independent CCAdv/WA Configuration mode

If Independent Configuration mode is selected, you can now directly map agent groups to contact groups mapped to Network Contact Centers on the Contact Group-Agent Group tab of the Contact Group Configuration page.

If Independent Configuration mode is selected, a contact group can be associated with an application that is not mapped to any contact center, application group, region, or operating unit. The application inherits those properties from the contact group associated with it.

If Independent Configuration mode is selected, a contact group can be associated with an agent group that is not mapped to any application. The agent group inherits contact center and application group properties from the contact group associated with it.
- You can now map an agent group to multiple contact groups.
- New bulk configuration tools are provided for CCAdv and WA, which enable you to configure applications, contact groups and their relationships to agent groups outside the Administration module. An additional configuration export/diagnostics tool is also provided. The new tools are found in the installation package, in folders \sql\mssql\bulkconfig and \sql\oracle\bulkconfig.
- CCAdv/WA now support interaction with Data Manager. Metadata previously stored in the Advisors Genesys Adapter configuration database is now found in the Platform database and Configuration Server.
- The Alerts window was previously called the Alerts pane or panel. You can open the Alerts window from the Map pane as you always did. The Alerts window has been re-designed in Release 8.1.5, and includes the following changes:
 - You can scroll through the alerts of each contact center automatically or manually.
 - Inactive alerts display for a few seconds before they are removed from the Alerts window.
 - The Alerts window now displays the difference between the last refresh of the metric value and the current metric value, as well as the percentage of the absolute difference.
 - An expanded Alert cell in the Alerts window displays a spark line to indicate the history of the alert

since the Alerts window was opened. Red or yellow spark line bars indicate the values that triggered a threshold alert.

- CCAdv and WA metric graphing changes:
 - The time slider attributes are maintained when you log out and log in again.
 - The five default colors used in the graph are more easily distinguished from one another; the color values have greater contrast.
 - If metrics are not defined for an object, they are not available to graph.
 - You can graph multiple time profiles for a metric simultaneously.
- Role-based access control (RBAC) extends to the Alert Management Reports window and the Alert Management tab. You can view action reports only if you have permission to see the aggregating objects and metrics of the alerts to which the reports are related.
- Workforce Advisor is horizontally scalable. The WA server can be deployed on one node, and more than one instance of the WA web services can be deployed on other nodes in the same cluster of Advisors. This permits a larger number of simultaneous users of WA.
- CCAdv supports 1500 concurrent users per installation and WA supports 1500 concurrent users per installation.
- During component upgrades, installation packages preserve the configured `Warehoused.metrics.max.minutes.kept` value.
- Frontline Advisor (FA) can operate in a distributed, or clustered, mode. In distributed mode, all FA instances share the Platform database and FA database. Only one FA instance, the FA engine, performs metric aggregation. The other FA instances, which provide FA web services, retrieve dashboard data and metrics from the FA engine. Together, the FA web instances provide the presentation layer.
- The following performance enhancements have been made to Frontline Advisor:
 - Frontline Advisor now supports 1500 concurrent users with a maximum dashboard age of 30 seconds for State metrics, 95% of the time, and a maximum dashboard age of 2 minutes for Performance and Rule metrics, 95% of the time.
 - Frontline Advisor now performs metric rollups in memory. Previously, FA performed the metric rollups through database stored procedures.
- Metadata previously stored in the Advisors Genesys Adapter database related to Data Manager functionality is now found in Advisors Platform and Genesys Configuration Server. The configuration database for Genesys Adapter is no longer required and has been removed. If you are upgrading to Release 8.1.5, you use the Advisors Object Migration Wizard to migrate data from the Genesys Adapter configuration database to Advisors Platform and Configuration Server. Changes related to this new functionality include the following:
 - Changes in the type of files supplied in the installation package.
 - Updates to the installation screens used to deploy AGA.
 - Introduction of a new user account (the Object Configuration User account), which you configure in Configuration Server.
- Advisors Genesys Adapter supports Genesys Platform Software Development Kit (PSDK) to Release 8.1.2.
- Performance Management Advisors support encryption of Advisors Genesys Adapter metrics database data.
- Genesys Cisco Adapter can connect to Oracle Real Application Clusters (RAC). RAC functions such as

High Availability and failover are not supported. Other Advisors components supported connection to RAC servers in Advisors release 8.1.4; see [Major enhancements in Advisor Suite functionality for Release 8.1.4](#) for additional information.

Introduced in Release 8.1.4

- New performance metrics added to Frontline Advisor:
 - Thirteen new source metrics added to the metrics configuration table (metric IDs ranging from 500 to 512 inclusive).
 - New source and computed performance metrics, including metrics that are disabled until you configure an associated filter for each (available in stored procedures in the FA database).
 - Advisors Platform, Advisors Genesys Adapter, Contact Center Advisor/Workforce Advisor, and Frontline Advisor can connect to Oracle Real Application Clusters (RAC). Advisors Cisco Adapter supports connection to RAC servers starting in Advisors release 8.1.5; see [Major enhancements in Advisor Suite functionality for Release 8.1.5](#) for additional information.
- Starting in Release 8.1.401:
 - French is added as an option for language and country settings. English and German continue to be options.
 - Performance Management Advisors are compatible with Oracle Java 1.7.
 - Performance Management Advisors can use a Transport Layer Security (TLS) connection to Genesys Configuration Server.

Introduced in Release 8.1.3

- A Metric Manager page is added to the Administration module. Metric Manager replaces the Metrics page. All CCAdv/WA metrics can be viewed in the Metric Manager, and the display attributes for all metrics can be updated. In Release 8.1.3, you can create custom application metrics using existing source metrics provided by Advisors Genesys Adapter and existing application metrics (you cannot create agent group or contact group metrics).
- Use the Time Profile for Charting property in the Metric Manager to enable up to five metrics for graphing.
- The Metric Graphing window functionality has the following changes:
 - Access to the Metric Graphing window is now available as an option within the row in which you select an object or application for graphing. Previously, the button was only available above the Contact Centers and the Applications panes.
 - You can access the Metric Graphing window from Workforce Advisor, which was previously unavailable.
 - You can graph WA forecast and real-time metrics.
 - Both Contact Center Advisor and Workforce Advisor metrics can be displayed within the same Metric Graphing window.

- You select the graphing style within the Metric Graphing window.
- CCAdv and WA support JAWS Standard version 11, an accessibility interface for users with visual impairment. JAWS software provides audio and a series of keyboard shortcuts for navigating the tabulated information on the screen.
- Additional privileges are added for Role-Based Access Control within Contact Center Advisor, Workforce Advisor, and Frontline Advisor.
- The Genesys Adapter installer includes additional Stat Server configuration options. You can now specify the types of statistics supported on the Stat Server pair you are associating with a Genesys Adapter instance. For example, you can choose to collect core statistics only on certain pairs of Stat Servers and third-party media statistics on other specific pairs.
- There is additional configuration in Configuration Server to enable identification of NonVoiceOnly virtual queues. If you want only third-party media statistics to be requested on certain virtual queues, those virtual queues must be identified in the Configuration Server.
- The Show Totals and Averages Row for Agent Groups option on the System Configuration page of the Administration module now hides the Totals and Averages row in both the Contact Center Advisor and Workforce Advisor Agent Groups panes. Previously, it affected the Agent Groups pane in the Contact Center Advisor dashboard only.
- A Default Grouping section is added to the System Configuration page in the Administration Module. Use the drop-down lists to change the default grouping selection for the CCAdv and WA Contact Centers panes.
- Column Chooser for Frontline Advisor now has the appearance and functionality of the Contact Center Advisor Column Chooser. Agents also use Column Chooser, which replaces the Configure pane on Agent Advisor.

Introduced in Release 8.1.2

- Removal of Administrative Partitioning (replaced by functionality in RBAC).
- Support for role-based access control (RBAC)—Access to business objects, hierarchies, and metrics is now controlled using roles and permissions that are created in Genesys Configuration Server, and whose configuration is completed in the Advisors Administration module. RBAC replaces the Administrative Partitioning feature of the previous release.
- Further integration with Genesys Management Framework, including management of user profiles, functionality permissions, and creation of business objects.
- A new Advisors Migration wizard supports CCAdv/WA business objects and FA metrics migration.
- Improved internal support for Stat Server load balancing—The relationship between a statistic and the Stat Server pair against which it is requested is now maintained during refresh or restart of the Adapter. Statistics continue to be requested from the same Stat Server(s) after an Adapter refresh or restart as was used prior to the restart. Genesys Adapter no longer depends on the value set for the Stat Server old-stats-remove-interval option.
- When you install Frontline Advisors (FA), you can now specify a Persons folder in Configuration Server to be the root for the FA hierarchy. If you specify a Persons folder as the root, the hierarchy is read and loaded from that Persons folder at FA (re)start and when you use the reload feature.
- The FA Manager Console supports features of JAWS Standard version 11, an accessibility interface for users with visual impairment. Keyboard shortcuts can be used in conjunction with screen reader accessibility software (JAWS) as an alternative to the standard browser navigation.

- The Data Manager feature is implemented in this release. The Data Manager feature provides support for multiple Genesys and Cisco Adapters and load balancing across multiple adapters using the same data source (in a single Genesys environment).
- Support for Genesys Stat Server 8.1.
- Support for logging of changes made in the Administration module.
- A threshold's direction is now established on a per-threshold basis, rather than on a per-metric basis.
- Support for multilingual templates for email in German, English, or both languages.
- Full compatibility with Adobe Flash version 11.
- Support for Genesys PSDK 8.1.
- Updates to Contact Center Advisor–Mobile Edition make it compatible with Advisors Platform release 8.1.2 and with Contact Center Advisor/Workforce Advisor release 8.1.2.

Important

Contact Center Advisor–Mobile Edition Release 8.1.2 maintains the features and functionality of the 8.1.1 Mobile Edition product. CCAdv-ME does not include features introduced in Advisors Platform and Contact Center Advisor Release 8.1.2.

Introduced in Release 8.1.1

- Administrative Partitioning—A partition is a means by which Advisors objects can be grouped into business areas for the purposes of administration.
- Significantly updated Administration user interface, which permits more flexible configuration.
- User authentication through the Configuration Server.
- Hierarchy management through the Configuration Server for Frontline Advisor.
- Metric Graphing enhancements for Contact Center Advisor.
- Additional time profiles for Frontline Advisor.
- Support for MS SQL 2008.
- Support for Oracle.
- Support for capacity rule metrics.
- Metric filtering (ability to add filters on a per-metric basis as distinct from a per-object basis).
- Additional agent group metrics.
- Implementation of Genesys system requirements.

Introduced in Release 8.0

- UI enhancements in the CCAdv, WA, FA, and AA dashboards, including:
 - Updated Dashboards to match the Genesys look and feel.
 - Introduction of a new Alerts pane.
 - Redesign of the Column Chooser.
 - Simultaneous display of metrics from different time periods on the CCAdv and WA dashboards.
- Support for multimedia metrics (Web chat and email) has been added.
- Custom metrics have been introduced, allowing the customer to configure certain sets of metrics based on their business needs.
- Users can now save their metric selections using the Metric Libraries functionality. This allows users to quickly switch between different views on the CCAdv and WA dashboards.

Introduced in Release 3.3

- Support for virtual agent groups that utilize the logged-in script as part of the group definition.
- Normalization of metrics between CCAdv and WA.
- Introduction of Metric Graphing. This feature allows users to see trends in certain metrics over an extended period of time.
- Dashes are now displayed for metrics for a particular object where those metrics cannot be retrieved from the data source from which the object came.