



Performance Management Advisors 8.1

**Contact Center Advisor -
Mobile Edition**

Deployment Guide

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Preface

Welcome to the Genesys *Performance Management Advisors 8.1 Contact Center Advisor - Mobile Edition—Deployment Guide*. This document describes how to install and configure the Contact Center Advisor - Mobile Edition (CCAdv-ME) application for Genesys Performance Advisors 8.1.

This document is valid only for 8.1.x releases of this product.

Note: For versions of this document created for other releases of this product, visit the Genesys Technical Support website, or request the Documentation Library DVD, which you can order by e-mail from Genesys Order Management at orderman@genesyslab.com.

This preface contains the following sections:

- [About CCAdv - Mobile Edition, page 7](#)
- [Intended Audience, page 8](#)
- [Making Comments on This Document, page 9](#)
- [Contacting Genesys Technical Support, page 9](#)
- [Document History, page 9](#)

For information about related resources and about the conventions that are used in this document, see the supplementary material starting on [page 31](#).

About CCAdv - Mobile Edition

The Genesys Advisor Performance Management Suite is an architecture specifically designed for acquiring, analyzing, and systematically distributing real-time data to the forefront of contact center management.

CCAdv-ME extends the real-time power and key capabilities of the desktop Genesys Advisor Performance Management Suite to the mobile user. CCAdv-ME connects people with key performance indicators (KPIs) so they can collaborate and solve service performance issues before they become critical.

CCAdv-ME provides managers, wherever they are located, with the information they need to spot developing service and operational performance trends using precise real-time graphical metrics and KPIs. With this information and proactive threshold alerts, managers can spot an evolving service-related issue and take action before it impacts customers or the bottom line.

CCAdv-ME consolidates key call management and routing data and key performance indicators such as:

- Service quality performance
- Inbound and outbound call volume
- Talk time
- After call work time
- Handle time
- Transfer
- Average speed of answer
- Abandoned calls

CCAdv-ME provides immediate access to contact center metrics and key performance indicators across levels of the organization. Over 35 unique metrics are available to meet the specific requirements of various user communities, from C-level executives to command center personnel.

Lines of business, call centers, and application groups are organized hierarchically, providing viewing flexibility to match the user's preferences and needs. CCAdv-ME displays detailed information regarding the activity and performance of these lines of business, call centers, and application groups.

Performance metrics in CCAdv-ME are available as a real-time "snapshot," as a summary for the rolling five-minute Now interval, and as a summary of the current day.

Intended Audience

This document is primarily intended for technical staff who install, deploy or configure the CCAdv-ME application. It has been written with the assumption that you have a basic understanding of:

- Computer-telephony integration (CTI) concepts, processes, terminology, and applications
- Network design and operation
- Your own network configurations

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Document History

This section describes information that has been added or substantially changed since the first release of this document.

Document Version 8.1.401.00

- Chapter 1, “CCAdv-ME Deployment Overview,” on [page 11](#):
 - A new section titled “**Security**” has been added to describe how CCAdv-ME provides security on mobile devices.
 - The section “Smartphone Client Requirements” on [page 12](#) has been updated to list the mobile device platforms that are supported in this release.
- A new Appendix A, “Role-Based Access Control for Mobile Devices,” on [page 27](#) has been added to describe the RBAC security enhancement and the Mobile Edition supported privileges.

Document Version 8.1.101.00

- Substantial changes to the document have been made because of the implementation of an installer.
- Support for Android devices has been added.
- The architecture diagram has been removed.
- Changes have been made to Apache configuration files.



Chapter

1

CCAdv-ME Deployment Overview

This chapter gives an overview of the installation of CCAdv-ME. It contains the following sections:

- [Requirements, page 11](#)
- [Security, page 12](#)
- [Deployment Process Overview, page 14](#)
- [Software Distribution Contents, page 14](#)
- [New in This Release, page 15](#)

Requirements

The aim of this guide is to help Contact Center Advisor - Mobile Edition (CCAdv-ME) server administrators deploy and configure the CCAdv-ME to talk with different CCAdv/WA installed instances.

Prerequisites

A correctly deployed and configured Contact Center Advisor & Workforce Advisor environment must be in place before deploying Mobile Edition. For information about how to deploy the Advisors suite, see the *Performance Management Advisors 8.1 Deployment Guide*.

The following prerequisites must be installed on the Mobile Edition deployment server before installing CCAdv-ME:

- Java JDK 1.6, or later
- Apache or Apache SSL Secure Web Server.
- Windows Server 2008 or 2003
- A database server (Microsoft SQL Server or Oracle DB Server)

- Advisors Platform 8.1.4 or 8.1.3
- Contact Center Advisor 8.1.4 or 8.1.3

Note: The database server must be compatible with Advisors Platform. For more information about supported database servers for your Advisors release, see *Performance Management Advisors 8.1 Contact Center Advisor and Workforce Advisor Administration User's Guide*.

Smartphone Client Requirements

- iPod Touch/ iPhone/iPad (iOS 6.0 and 5.0)
- BlackBerry (operating system 7.1, 7.0, and 6.0)
- Android (operating system 2.1)

Server Requirements

Minimum:

- App Server—2 CPU with 4Gb memory.

Recommended:

- App Server—4 CPU with 4Gb memory.

Security

Contact Center Advisor provides security through Role-Based Access Control (RBAC), which consists of two main parts: object permissions and functionality privileges. CCAAdv uses the existing logic (described in detail in the *Contact Center Advisor & Workforce Advisor Administrator User's Guide*) to mimic the behavior of these permissions and privileges in the Mobile Edition. See Appendix A, “Role-Based Access Control for Mobile Devices,” on [page 27](#).

RBAC primarily enforces security by allowing or limiting visibility of objects in the interface. What a user sees is determined by the his/her assigned roles. If the role that is assigned to the user does not grant them access to certain functionality, that functionality is not visible to the user.

For more information about how roles work together with permissions to finely tune what a user can access, see the section, “Roles and Permissions”, Chapter 1, in the *Contact Center Advisor & Workforce Advisor Administrator User's Guide*.

Object Permissions

Using object permissions, you can assign a user's access permission to certain objects. When you apply permissions to an object, they apply equally to all properties of the object—if a user has access permissions, they see the entire object.

CCAAdv Object Permissions

CCAAdv object permissions include:

- Metrics
- Operating Units
- Reporting Regions
- Geographical Regions
- Contact Centers
- Application Groups

Metric Permissions

Starting in 8.1.4, CCAAdv-ME loads metrics dynamically, based on user permissions taken from the server cache. It loads the metrics through `/ca-ws/columns.do`, to ensure the metrics information is up-to-date. If metrics permissions change after a user chooses to display that metric, it is displayed with no data. However, when a user reselects the metrics to display, the list is refreshed.

Other Permissions

All other permissions, (see [CCAAdv Object Permissions](#)) are implemented in the CCAAdv-ME `MapResource`. Therefore, the relevant objects are loaded on-demand, based on the user access permissions granted for each object.

Functional Privileges

Functionality privileges determine what tasks the user can perform or what functions a user can execute on objects to which he/she has access.

Privileges are configured by using roles. If a privilege is present in a role, then any users assigned that role have access to the functionality controlled by that privilege. The value for the privilege key can be anything, or can be left blank.

Privileges for each role are stored as key-value pairs in the `Annex` tab of that role in Genesys Configuration Manager.

For more information about the CCAAdv functional privileges, see the section, “Privileges in Advisors” and “List of Advisor Privileges”, Chapter 1, in the *Contact Center Advisor & Workforce Advisor Administrator User's Guide*.

Deployment Process Overview

The high-level deployment process for CCAdv-ME is described in [Task Summary: Deploying CCAdv-ME](#).

Task Summary: Deploying CCAdv-ME

Step	Task	Notes & References
1	Ensure that all the external software and hardware prerequisites are in place.	See “Prerequisites” on page 11 .
2	Configure the CCAdv-ME environment and deployment server.	See Chapter 2, “Installing Mobile Edition Server,” on page 17 .
3	Create the trend charting database and configure trend charting.	See Chapter 2, “Installing Mobile Edition Server,” on page 17 .
4	Complete the non-installer parts of the deployment.	See Chapter 3, “Post-Installer Deployment,” on page 23 .
5	End users download the application from relevant smartphone application store.	“Deploying Smartphone Client Applications” on page 24 .

Software Distribution Contents

[Table 1](#) lists the contents of the CCAdv-ME software distribution.

Table 1: Distribution Artifacts

Distribution Artifact	Folder	Contents/Notes
ma-distribution-<version>.zip		ccadv-installer-version.jar—The application installer
	legal	Licenses, notices and ReadMe.
	blackberry	Blackberry client Touch/Classic. The Blackberry client is available on the Blackberry App World store.
	iphone	The iPhone client binary is supplied for reference only and is not functional. The client is supplied through the Apple App Store.
	android	The Android client (ma-android-client.apk). The Android client app is also available on the Android App store.

New in This Release

This section contains a brief description of the new features in CCAAdv-ME 8.1.x releases.

- Release 8.1.4**
- Enhanced security is provided by using Role-Based Access Control (RBAC) on supported mobile devices, which is backwards compatible with earlier Advisors releases.
 - Support for additional device platforms that are backward compatibility with earlier Advisors releases:
 - iPhone/iPad/iPod Touch iOS 6.0
 - BlackBerry 7.1, 7.0, and 6.0



Chapter

2

Installing Mobile Edition Server

This chapter describes how to install and configure the CCAdv-ME environment and the deployment server. It contains the following sections:

- [Environment Prerequisites, page 17](#)
- [Installation Contents, page 17](#)
- [Mobile Edition Server Installation, page 18](#)

Environment Prerequisites

Before installing Mobile Edition, you must do the following:

1. Install Performance Management Advisors Platform.
2. Install Performance Management Advisors Contact Center Advisor.

For supported versions, see “Prerequisites” on [page 11](#).

Note: Whenever a new version of CCAdv is installed, uninstall Mobile Edition, then install the new CCAdv version and re-install Mobile Edition.

Installation Contents

The following files are shipped with the CCAdv-ME distribution:

- `ccadv-me-installer-<8.1.400.xx>.jar`

Mobile Edition Server Installation

This section describes Mobile Edition server installation procedures.

Procedure: Installing Mobile Edition Server

Start of procedure

1. From the CCAdv-ME software DVD, launch the installer by double-clicking the install jar. The Installer screen displays.

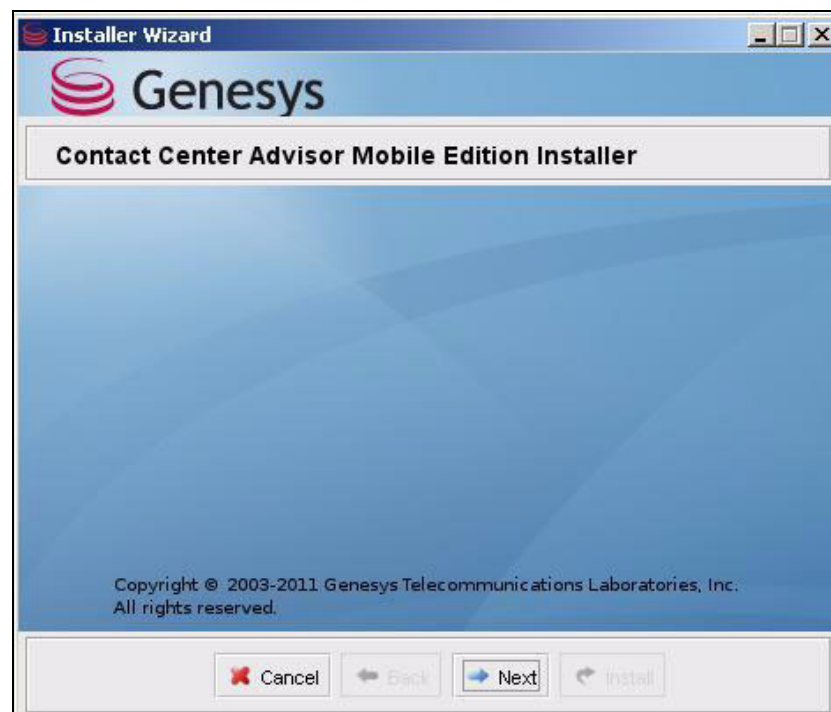


Figure 1: Mobile Edition Installer Screen

2. Click Next. The Advisors Destination Directory screen displays.

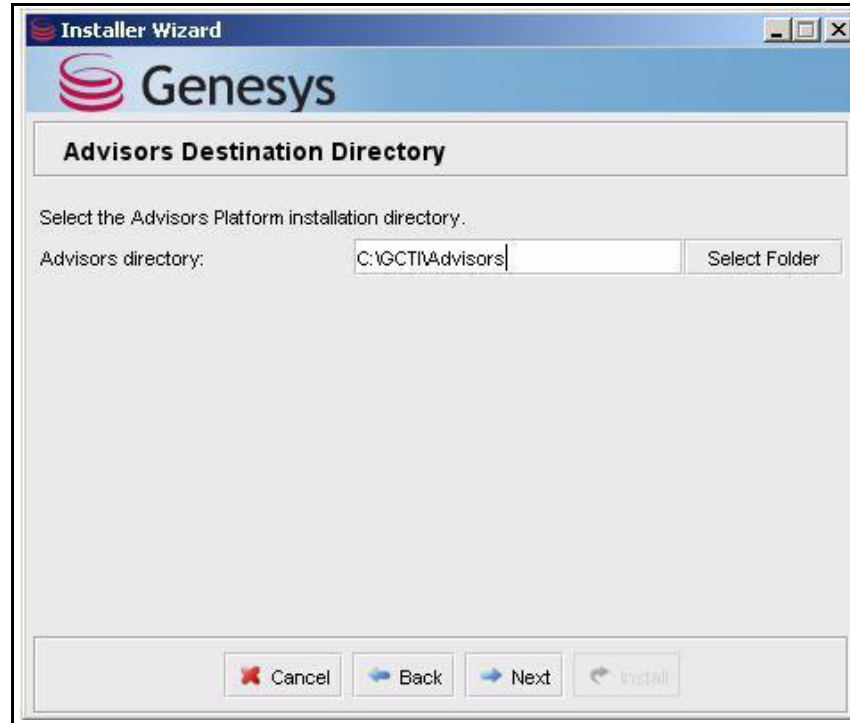


Figure 2: Advisors Destination Directory Screen

3. Enter the path to the Advisors Platform installation and click Next. The Server Configuration screen displays.

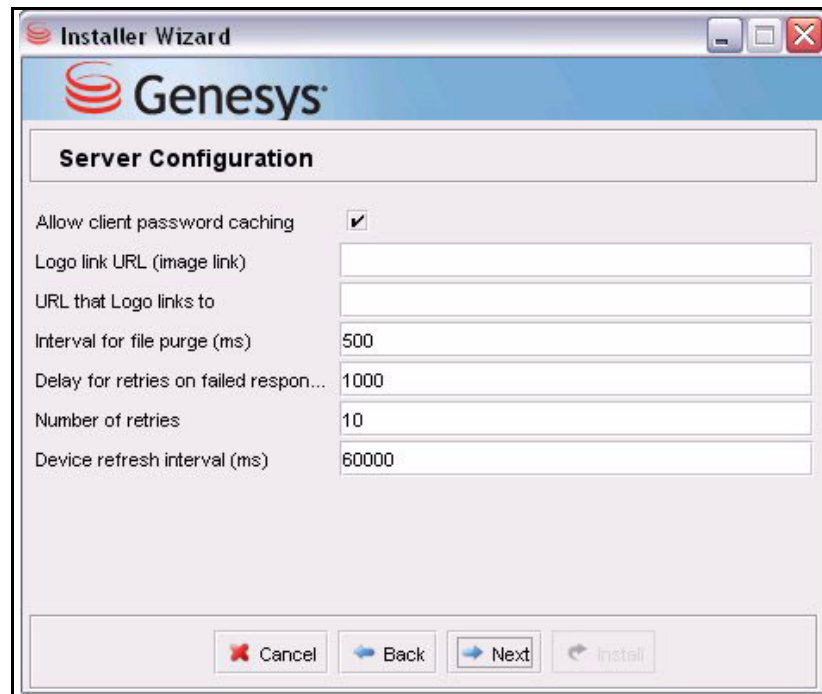


Figure 3: Server Configuration Screen

4. Complete the fields as follows:
 - `Allow client password caching`—Determines whether the server will tell its clients whether to cache the password on the client or not. If this option is unchecked, the user will be redirected to the Login view every time he/she launches an application.
 - `Logo Link URL (image link)`—Users are redirected to this URL when clicking on the personalized logo in the Login screen.

Notes: When entering the logo URL in CCAdv-ME Server configuration, be sure to include `http` or `https` in the URL. For example, enter `http://www.Rogers.com` rather than `www.Rogers.com`. If logo details are not specified, the default Genesys logo and URL are used.

- `URL that Logo links to`—This hyper linked image is used to personalize the login page. Administrators can add an image URL of the company's logo which will be visible in the Login page.
 - `Interval for file purge (ms)`—This value (milliseconds) determines the time to delete charting local cache from the server.
 - `Delay for retries on failed response`—This value (milliseconds) determines 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 (milliseconds) represents the refresh time of the client views when auto-refresh is enabled.
5. Click Next. The Trend Chart Configuration screen displays.

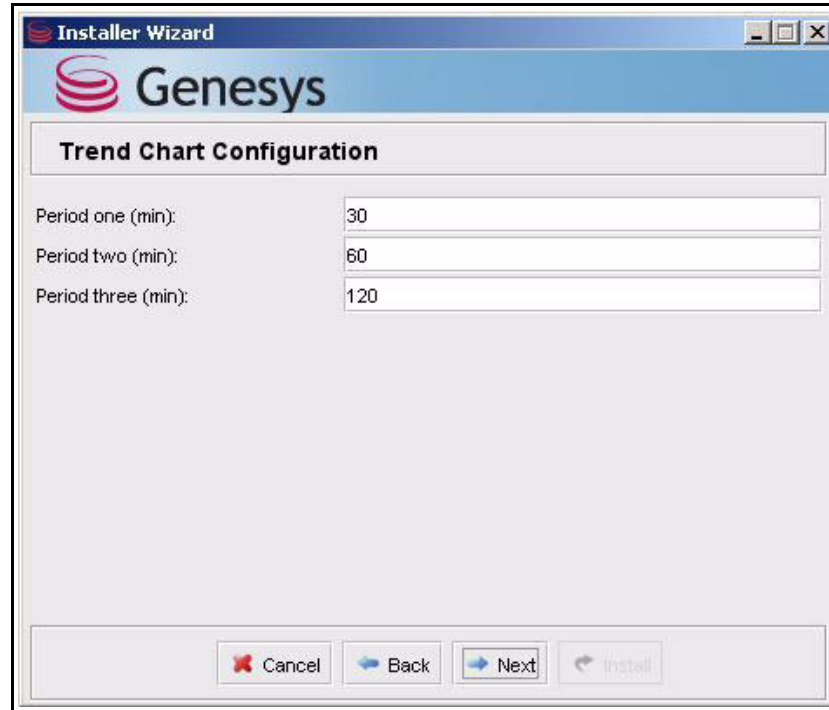


Figure 4: Trend Chart Configuration Screen

6. This screen enables administrators to personalize the time periods for the trend charting. 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 CCAAdv server.

Note: Genesys recommends that you enter numerical characters only in these fields, such as 30, 60, or 120.

7. Click Next.
8. The Installation Progress screen displays. Wait until the Finished message displays.

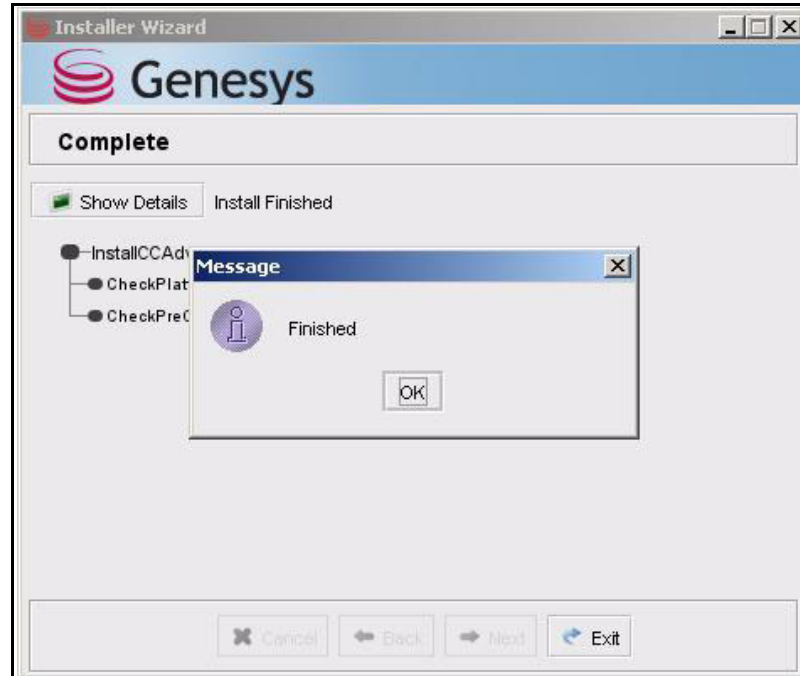


Figure 5: Installation Finished Message

End of procedure



Chapter

3

Post-Installer Deployment

This chapter describes additional deployment and configuration tasks that are not part of the standard installer. It contains the following sections:

- [Apache Configuration, page 23](#)
- [Upgrading an Existing Installation, page 24](#)
- [Deploying Smartphone Client Applications, page 24](#)

Apache Configuration

Add the following lines to the bottom of the Platform/CCAdv Apache httpd.conf file in the Platform and Advisors Modules section, and change the hostnames as necessary:

```
# Platform and Advisors Modules
.
.
.
ProxyPass /ma ajp://HOSTNAME:8009/ma
```

Upgrading an Existing Installation

This section describes how to upgrade an existing installation

Procedure: Upgrading an existing installation

Start of procedure

1. Undeploy the Mobile Edition application:
 - a. Under `Advisors` root directory, remove the `ccadv-me` folder.
 - b. Under the `<Advisors_root_dir>/geronimo-tomcat6-minimal-2.2.1/repository/com/genesyslab/advisors/` folder, remove the `ccadv-me-web` folder.
 - c. Open the `<Advisors_root_dir>/geronimo-tomcat6-minimal-2.2.1/var/config/config.xml` file, and remove the following line: `<module name="com.genesyslab.advisors/ccadv-me-web/[version]/war" />`.
 - d. Save the changes and close the file.
2. Deploy the new version.

End of procedure

Deploying Smartphone Client Applications

This section contains procedures about how to install the Smartphone Client applications for Blackberry, Apple (iPhone, iPad, and iPod), and Android devices.

Deploying Blackberry Client Installation Packages

Procedure: Deploying Blackberry clients

Start of procedure

1. Copy the `blackberry` directory from the software CD to the `apache/htdocs` folder.
2. From the device, point to the URL of the web server and, in the `ota` folder inside the appropriate device type, click on the `.jad` file.

Note: For Blackberry devices that have a physical keyboard (with or without a touch screen) use the Classic device type. For Blackberry devices that do not have a physical keyboard use the Touch device type.

3. Confirm to download and follow the prompts.

End of procedure

Note: The Blackberry app is also distributed via the Blackberry app store.

Deploying iPhone/iPad/iPod Touch Client Installation Packages

An iPhone, iPad or iPod Touch client application is distributed on the software CD for reference, but is not functional. The functional applications are distributed via the Apple App Store. Use the standard Apple App Store download procedures to obtain the functional app.

Deploying Android Client Installation Packages

Procedure: Deploying Android clients

Start of procedure

1. In the `apache/htdocs`, create a new directory called `android`.
2. Copy the `.apk` file from the software CD and paste it to the `android` directory.

3. Adjust the `download.html` file to create a link for the `android` directory.
4. On the device, click the link for Android and follow the prompts to download the app.

End of procedure

Note: The Android app is also distributed via the Android app store.



Appendix

A

Role-Based Access Control for Mobile Devices

This appendix describes how Contact Center Advisor - Mobile Edition (CCAdv-ME) enforces security through Role-Based Access Control (RBAC) and explains how to implement it on mobile devices. It contains the following section:

- [Overview, page 27](#)
- [Mobile Edition Privileges, page 28](#)

Overview

CCAdv - ME users can sometimes have permissions that are not so useful. For example, users with permissions to the CCAdv module (and ME) and permissions to view the Performance Monitor will not be able to view anything if they do not have access to any of the metrics and/or business attributes. They can log in to the Advisor interface, but the real-time tab will not render if they do not have permissions to at least one Metric.

Therefore, an administrator must define a basic set of permissions in Configuration Server, so that users can view objects and functionality in the Application interface.

Minimum User Permissions

Assuming users have access to ME, they will need the following minimum permissions:

- Permissions to at least one single Contact Center and/or Application.
- Permissions to one of the following objects: Reporting Region, Geo Region, or Operating Unit.

- Permissions to at least one single Metric.

Note: If a user does not have permissions to view any of the default metrics, the first metric that displays in the ME Metrics or Hierarchy list is the first metric in the Column Chooser Available metrics list to which the user does have access permissions.

Mobile Edition Privileges

Compared to Contact Center Advisor, the Mobile Edition has limited functionality. Therefore, CCAdv-ME requires only a subset of functional privileges. [Table 2](#) provides a comparison of CCAdv privileges to Mobile Edition privileges.

Table 2: Comparison of CCAdv Privileges to Mobile Edition Privileges

Privileges	In CCAdv	In ME
ContactCenterAdvisor.Dashboard.canView	✓	✓
ContactCenterAdvisor.Dashboard.AgentGroupsPane.canView	✓	
ContactCenterAdvisor.Dashboard.ColumnChooser.canView	✓	✓
ContactCenterAdvisor.Dashboard.EnterpriseStats.canView	✓	✓
ContactCenterAdvisor.Dashboard.PivotSelect.canView	✓	
ContactCenterAdvisor.PerformanceMonitor.canView	✓	✓
ContactCenterAdvisor.PerformanceMonitor.CallFlowPane.canView	✓	✓
ContactCenterAdvisor.PerformanceMonitor.CurrentCapacity.canView	✓	✓
ContactCenterAdvisor.ActionManagementReport.canView	✓	
ContactCenterAdvisor.AlertManagement.canView	✓	

Dashboard Privilege

The Dashboard privilege (ContactCenterAdvisor.Dashboard.canView) controls access to the CCAdv dashboard.

Users with this privilege can access the CCAdv dashboard, the CCAdv tab in the Advisor browser, and log in to CCAdv-ME.

Note: Users cannot log in to CCAdv-ME if they do not have the privilege to access the Dashboard.

Column Chooser Privilege

The Column Chooser privilege (`ContactCenterAdvisor.Dashboard.ColumnChooser.canView`) determines which metrics the user can choose for display.

Users with this privilege can choose which metrics to display on the dashboard, access the `Column Chooser` button on the dashboard, and access the `Metrics` tab in the Mobile application.

Note: Users will either see a disabled `Metrics` tab (iOS) or will not see the `Metrics` menu/button (Blackberry) if they do not have the privilege to access Column Chooser.

Enterprise Stats Privilege

The Enterprise Stats privilege (`ContactCenterAdvisor.Dashboard.EnterpriseStats.canView`) controls the display of `Enterprise Stats` row in the dashboard.

Users with this privilege can see the `Enterprise Performance` row in the dashboard.

Note: Users will see N/A in the `Enterprise Performance` row in the dashboard, if they do not have the privilege to access Enterprise Stats.

Performance Monitor Privilege

The Performance Monitor privilege (`ContactCenterAdvisor.PerformanceMonitor.canView`) determines who can view the Performance Monitor.

Users with this privilege can access to the `Performance Monitor` button on the dashboard and the right-arrow button (which directs to the Performance Monitor view) on each row of stats.

Note: Users will not see any arrow buttons (iOS) or menu/buttons (Blackberry) if they do not have the privilege to access Performance Monitor.

Call Flow Stats Privilege

The Call Flow Stats privilege (`ContactCenterAdvisor.PerformanceMonitor.CallFlowPane.canView`) determines who can view the Call Flow stats in the Performance Monitor. Users with this privilege can view the Call Flow stats in the Performance Monitor.

Note: Users will see the Call Flow stats pane, but no data will be displayed if they do not have the privilege to access Call Flow Stats.

The behavior prompted by this flag is the same for both CCAAdv and CCAAdv-ME.

Current Capacity Stats Privilege

The Current Capacity Stats privilege (`ContactCenterAdvisor.PerformanceMonitor.CurrentCapacity.canView`) determines who can view the Current Capacity stats in the Performance Monitor.

Users with this privilege can view the Current Capacity stats in the Performance Monitor.

Note: Users will see the Current Capacity stats pane, but no data will be displayed if they do not have the privilege to access Call Flow Stats.

The behavior prompted by this flag is the same for both CCAAdv and CCAAdv-ME.



Supplements

Related Documentation Resources

The following resources provide additional information that is relevant to this software. Consult these additional resources as necessary.

Performance Management Advisors

- *Performance Management Advisors 8.1 Contact Center Advisor & Workforce Advisor Administrator User's Guide* describes how to configure your enterprise hierarchy and set up threshold rules/goals and users.

Genesys

- *Genesys Technical Publications Glossary*, which ships on the Genesys Documentation Library DVD and which provides a comprehensive list of the Genesys and computer-telephony integration (CTI) terminology and acronyms used in this document.
- *Genesys Migration Guide*, which ships on the Genesys Documentation Library DVD, and which provides documented migration strategies for Genesys product releases. Contact Genesys Technical Support for more information.
- Release Notes and Product Advisories for this product, which are available on the Genesys website at <http://docs.genesyslab.com>.

Information about supported hardware and third-party software is available on the Genesys Technical Support website in the following documents:

- *Genesys Supported Operating Environment Reference Guide*
- *Genesys Supported Media Interfaces Reference Manual*

Consult these additional resources as necessary:

- *Genesys Hardware Sizing Guide*, which provides information about Genesys hardware sizing guidelines for Genesys releases.

- *Genesys Interoperability Guide*, which provides information on the compatibility of Genesys products with various Configuration Layer Environments; Interoperability of Reporting Templates and Solutions; and GPlus Adapters Interoperability.
- *Genesys Licensing Guide*, which introduces you to the concepts, terminology, and procedures relevant to the Genesys licensing system.

For additional system-wide planning tools and information, see the release-specific listings of System Level Documents on the Genesys Technical Support website. These documents are accessible from the [system level documents by release](#) tab in the Knowledge Base Browse Documents Section.

Genesys product documentation is available on the:

- Genesys Technical Support website at <http://genesyslab.com/support>.
- Genesys Documentation wiki at <http://docs.genesyslab.com/>.
- Genesys Documentation Library DVD and/or the Developer Documentation CD, which you can order by e-mail from Genesys Order Management at orderman@genesyslab.com.

Document Conventions

This document uses certain stylistic and typographical conventions—introduced here—that serve as shorthands for particular kinds of information.

Document Version Number

A version number appears at the bottom of the inside front cover of this document. Version numbers change as new information is added to this document. Here is a sample version number:

```
80fr_ref_06-2008_v8.0.001.00
```

You will need this number when you are talking with Genesys Technical Support about this product.

Screen Captures Used in This Document

Screen captures from the product graphical user interface (GUI), as used in this document, may sometimes contain minor spelling, capitalization, or grammatical errors. The text accompanying and explaining the screen captures corrects such errors *except* when such a correction would prevent you from installing, configuring, or successfully using the product. For example, if the name of an option contains a usage error, the name would be presented exactly as it appears in the product GUI; the error would not be corrected in any accompanying text.

Type Styles

[Table 3](#) describes and illustrates the type conventions that are used in this document.

Table 3: Type Styles

Type Style	Used For	Examples
Italic	<ul style="list-style-type: none"> Document titles Emphasis Definitions of (or first references to) unfamiliar terms Mathematical variables <p>Also used to indicate placeholder text within code samples or commands, in the special case where angle brackets are a required part of the syntax (see the note about angle brackets on page 34).</p>	<p>Please consult the <i>Genesys Migration Guide</i> for more information.</p> <p>Do <i>not</i> use this value for this option.</p> <p>A <i>customary and usual</i> practice is one that is widely accepted and used within a particular industry or profession.</p> <p>The formula, $x + 1 = 7$ where x stands for . . .</p>

Table 3: Type Styles (Continued)

Type Style	Used For	Examples
Monospace font (Looks like teletype or typewriter text)	All programming identifiers and GUI elements. This convention includes: <ul style="list-style-type: none"> • The <i>names</i> of directories, files, folders, configuration objects, paths, scripts, dialog boxes, options, fields, text and list boxes, operational modes, all buttons (including radio buttons), check boxes, commands, tabs, CTI events, and error messages. • The values of options. • Logical arguments and command syntax. • Code samples. Also used for any text that users must manually enter during a configuration or installation procedure, or on a command line.	Select the Show variables on screen check box. In the Operand text box, enter your formula. Click OK to exit the Properties dialog box. T-Server distributes the error messages in EventError events. If you select true for the inbound-bsns-calls option, all established inbound calls on a local agent are considered business calls. Enter exit on the command line.
Square brackets ([])	A particular parameter or value that is optional within a logical argument, a command, or some programming syntax. That is, the presence of the parameter or value is not required to resolve the argument, command, or block of code. The user decides whether to include this optional information.	<code>smcp_server -host [/flags]</code>
Angle brackets (<>) (<>)	A placeholder for a value that the user must specify. This might be a DN or a port number specific to your enterprise. Note: In some cases, angle brackets are required characters in code syntax (for example, in XML schemas). In these cases, italic text is used for placeholder values.	<code>smcp_server -host <confighost></code>



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