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Genesys Interactive Insights Deployment Guide

What BO/BI Components Must I Install?

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What BO/BI Components Must I Install?

SAP BusinessObjects (BO) software is an optional component of Genesys Info Mart, but is required for the operation of Genesys Interactive Insights (GI2). Refer to SAP BusinessObjects Business Intelligence Platform 4 (BI 4.1) documentation for additional installation and upgrade instructions.

Access BO/BI Documentation from the following sources:

- From the SAP BusinessObjects Business Intelligence Platform Documentation CD.
- If you are a direct SAP customer, from the [SAP website](#).
- If you obtained BI software through Genesys, from the [SAP website](#).

GI2 does not require all available BI components: this page describes only those components that are required for GI2 operation.

Prerequisites to BI Software Installation

Prior to beginning the installation of BI 4.x, ensure that you have met the following prerequisites:

- Acquire the appropriate installation package, which is provided either directly from SAP or from Genesys.
- Ensure that no prior BI software versions pre-exist on your host. If you have a prior version of BI 4.x installed, you should upgrade it, rather than install it anew. Refer to the relevant BI 4.x Update Guide for instructions.
- Ensure that your operating system is a supported version. Supported platforms are described in BI documentation. Note that BI supports a wider range of platforms than does GI2.
- Ensure that your environment meets or surpasses the minimum hardware and sizing requirements described in BI documentation for the various BI servers. For example, BI 4.1 requires 16 GB RAM and up to 14 GB hard-disk space.
- Ensure that your environment meets or surpasses the minimum software requirements for the various server products described in BI documentation. Note that BI software supports connectivity to a wider range of RDBMSs than does Genesys. This release of GI2 restricts RDBMS support to those that currently are supported by Genesys Info Mart. More information is available in the [Genesys Interactive Insights](#) section of the [Genesys Supported Operating Environment Reference Guide](#).

Additional notes for UNIX platforms

- To install BI, you must not be logged on as the root user.
- Ensure that the LOCALE setting of the UNIX shell is set to Unicode encoding (en_US.UTF-8 for Solaris, en_US.utf8 for Linux). For RedHat Enterprises Linux operating systems, disable the Security Enhanced Linux feature. The standard RHE installation enforces this feature by setting SELINUX=enforcing in the **/etc/sysconfig/selinux** file. You must set this parameter to disabled and reboot the server in order

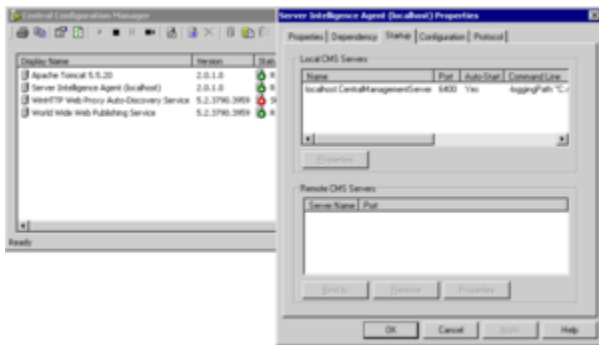
for a BI installation to be successful.

- On Linux 5.x installations, ensure that the first line of the **etc/hosts** file contains the default string: 127.0.0.1 localhost.localdomain localhost.ER321049511 The installation routine varies slightly depending on your UNIX platform, and can take more than an hour to complete on any platform.

Obtaining Access Parameters

Make note of the access parameters that you specify when setting up the Central Management Server (CMS) during BI software installation. Later, when you install GI2, you will need the BI administrator's user name and password, as well as the host and port information, if the default values were not chosen. The defaults are:

- **User name:** Administrator (This user must be named Administrator. Another user account with administrative permissions will not suffice.)
- **Password:** A suitable password consisting of a combination of a upper case letters, lower case letters, and numbers. A blank password is not permitted.
- **Host:** Name of your computer
- **Port:** 6400 (See **Retrieving the CMS Port Value.**)



Retrieving the CMS Port Value

Procedure: Retrieving the CMS Port Value

Purpose: Use this procedure to retrieve the port number from the Central Configuration Manager.

Steps

1. Open the Central Configuration Manager, and right-click the **Server Intelligence Agent** application.
2. From the context menu that appears, select **Properties**, and then select the **Startup** tab.
3. Record the CMS port number, which appears in the **Local CMS Servers** frame, as shown in the

Figure **Retrieving the CMS Port Value.**

Important

The BO/BI license that Genesys provides is a restricted license. Refer to the licensing agreement for details on what data you can access when using this software.

Required BI Components

The BI 4.x installation wizard gives you the opportunity to select which components to install. The following are required for GI2 operation:

- **Client Components:** Import Wizard, Information Design Tool, Web Intelligence Rich Client, Developer Components (BOE Java SDK, BOE Web Services, BOE .Net SDK).
Note: With the exception of BOE Java SDK and BOE Web Services, all client components are available only on Microsoft Windows platforms.
- **Web Tier Components:** Select any of the listed components.
- **Server Components:** Central Configuration Manager (Microsoft Windows only), Central Management Server, Event Server, Job Servers (Publication, Destination, List of Values, Program, Adaptive), Report Application Server, Input File Repository Server, Output File Repository Server, Web Intelligence Processing Server, Adaptive Processing Server, Dashboard and Analytics Servers, Auditing Reports and Universes.
- **Database Access:** Microsoft SQL Server, Oracle, PostgreSQL.
Note: For database access, GI2 supports connectivity to the listed RDBMS, as supported by Genesys Info Mart. For information about the specific supported RDBMS versions, refer to the [Genesys Supported Operating Environment Reference Guide](#).

Installing BI software

BI 4.x software is provided among the software that is bundled with GI2. Instructions for installing the software are provided in BusinessObjects documentation—specifically, within the following documents: *Installation Guide for Windows*, *Installation Guide for UNIX*.

In most cases, you will install only the components required for GI2 operation. Optionally, you can install the complete version of BI 4.x if you want more functionality than is provided by the standard Genesys configuration of BI for GI2, including tools that GI2 does not require (for example, Crystal Reports). This standard configuration specifies the following:

- English language

- Tomcat application server
- Sybase SQL Anywhere 12.0.1 (installed by default as the DBMS for the Central Management Server (CMS), for all platforms)
- Administrator, as the name of the CMS administrative user

Important

Deployment of the full version of BI still binds you to the limited licensing agreement regarding its use, which is described in the *Genesys Interactive Insights User's Guide*.

Setting up the BI Environment

Refer to the *Business Intelligence Platform Administrator Guide* to set up the administrative functions for using BI software, including the following:

- Setting rights.
- Managing user accounts and groups.
- Managing data sources and connections.
- Managing objects.
- Scheduling objects.
- Managing profiles.
- Row-level and column-level security.

The reports and universe that are deployed later during GI2 installation are initially available only to the following users:

- Administrator
- Developer
- Editor
- Viewer
- Basic

You can create other users and configure their roles and access to the reports and to the universe in accordance with your company's policy. For multi-tenant environments, consider creating separate groups (at minimum) for each tenant, to align with the way in which universe connections to the Genesys Info Mart should be defined. Refer to *Manually Setting Up GI2 Access Levels* for information about the GI2 groups and users that are provided in the GI2 BusinessObjects archive. You can disregard preferences and permissions for components that are not required for GI2 operations—such as Crystal Reports and Xcelsius.