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Genesys Info Mart Deployment Guide

Configuring the Genesys Info Mart Application

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This page describes how to create and configure the Genesys Info Mart application, which you must do before you install it.

Before You Proceed

Before you can configure Genesys Info Mart, make sure that you have:

- Prepared your sources of data — the ICON applications and their databases (see [Preparing Interaction Concentrator](#)).
- Prepared your Genesys Info Mart target database(s) (see [Preparing the Info Mart Database](#)).
- Configured the DAPs that are required to access the source and target databases in your topology (see [Configuring Required DAPs](#)).

Overview: Preparing the Genesys Info Mart Application Object

The following steps summarize the task flow to configure an Application object and related configuration objects for Genesys Info Mart.

1. **Create the server application.**

To create an Application object for Genesys Info Mart Server:

- a. Import the **Genesys_Info_Mart_ETL_<release>.apd** template. For full details, see [Importing the application template](#).
- b. Create the Application object with basic configuration. For more information, see [Creating the Genesys Info Mart application](#).

2. **Customize the configuration of the Genesys Info Mart Application object to support the functionality that you require.**

- a. Review the configuration options and decide on the settings that are appropriate for your environment. For information about the options, see the following:
 - [Data-Processing Options for Genesys Info Mart](#)
 - [Operations-Related Options for Genesys Info Mart](#)
 - [Genesys Info Mart Aggregation-Related Options for GCXI and RAA](#)
- b. Modify settings of configuration options, as required for your environment. For more information, see [Configuring Options for Genesys Info Mart](#).

- c. (Optional) When you configure the Genesys Info Mart application options, create custom **[date-time-***] configuration sections to support multiple calendar dimensions. For more information, see [Setting the Genesys Info Mart application options](#), Step 6.

3. **Configure the other objects that are required to support detailed reporting about interactions of various media types.**

For more information, see [Configuring Supporting Objects](#).

If you need to enable HA in either a new or an existing Genesys Info Mart environment, see [Enabling High Availability](#).

Importing the Application Template

Before you can configure an Application object for Genesys Info Mart, you must import its application template. The application template provides a majority of the configuration options, as well as the default values for them.

The Genesys Info Mart installation package includes an application template, which is named **Genesys_Info_Mart_ETL_<release>.apd**.

You must import the application template only once, no matter how many Genesys Info Mart Application objects you create.

You import the Genesys Info Mart application template in the usual way; Genesys Info Mart has no special requirements. For full details about how to import the application template and create an application, see the Help for the configuration interface you are using — [Configuration Manager Help \(8.1\)](#), [Genesys Administrator Help](#), or [Genesys Administrator Extension Help](#).

After you have imported the application template:

- If you plan to deploy the Genesys reporting presentation layer (GCXI or the separately installed RAA package, review the recommendations on application deployment and modify the Genesys Info Mart application template to support aggregation, as described in the section about importing aggregation options in the [Reporting and Analytics Aggregates Deployment Guide](#) for your release.
- Otherwise, continue with [Creating the Genesys Info Mart Application](#).

Creating the Genesys Info Mart Application

After you import the application template, you create and configure an Application object for Genesys Info Mart in the interface you use to configure your Genesys applications.

Procedure: Creating the Genesys Info Mart application

Purpose: To create an application with basic configuration for your environment, by using the Genesys Info Mart application template that you just imported.

Prerequisites

- You are logged in to the interface you use to configure your Genesys applications.
- The application template has been imported, as described in [Importing the Application Template](#).
- In an environment in which you plan to deploy GCXI reports or the RAA package, you have completed any required modifications to the Genesys Info Mart application template, as described in the section about importing aggregation options in the [Reporting and Analytics Aggregates Deployment Guide](#) for your release.

Steps

1. In the configuration interface, create a new application, based on the Genesys Info Mart template that you imported. For full details about how to create an application, see the Help for the configuration interface you are using — [Configuration Manager Help \(8.1\)](#), [Genesys Administrator Help](#), or [Genesys Administrator Extension Help](#).
2. Configure the application. Note the following Genesys Info Mart requirements on the various configuration tabs:
 - General tab**
 - In the **Name** text box, enter a name for your Genesys Info Mart application, or select one from the drop-down list.
 - Make sure that the **State Enabled** check box is selected.
 - Tenants tab**
 - Skip the **Tenants** tab if it displays. No configuration of tenants is required.
 - Server Info tab**
 - In the **Host** text box, select the host on which you will install the Genesys Info Mart Server, or click **Browse** to navigate to the host location. If the host does not appear in the list, you must add it.
 - In the **Communications Port** text box, enter the port number that corresponds to your host. Genesys Info Mart Manager uses this port to communicate with the Genesys Info Mart Server.
 - Start Info tab**
 - Enter any value in the **Working Directory**, **Command Line**, and **Command Line Arguments** text boxes. The values that you enter are merely placeholders; they are updated with actual values during the Genesys Info Mart installation process.

- If your deployment will include primary and standby instances of the Genesys Info Mart application, ensure that the **Auto-Restart** check box is unchecked on both Application objects (in other words, automatic restart is not selected). If your deployment will include only a single instance of the Genesys Info Mart application, you may choose to select **Auto-Restart**.

Connections tab

Add a connection to:

- Each Interaction Concentrator (ICON) Application that you configured to capture data-source information for Genesys Info Mart.
- Each of the extraction DAPs and the Info Mart DAP that you configured, as described in [Configuring Required DAPs](#).
- The Message Server Application object. Genesys Info Mart uses Message Server to send log messages to the Genesys Central Logger.
For information about how to secure the connection to Message Server, see [Enabling Secure Connections](#).
- (Optional) The Configuration Server application (named **confserv**). You must configure an overt connection to Configuration Server only if you want to:
 - Use ADDP for the connection. To enable ADDP for the connection, specify addp as the **Connection Protocol**, and set the values for the **Local Timeout**, **Remote Timeout**, and **Trace Mode** properties. For more information, see [Configuring ADDP](#) in the *Management Framework Deployment Guide*.
 - Secure the connection. For more information, see [Enabling Secure Connections](#).

Important

In an environment with distributed data centers, including a SIP Cluster deployment, configure this optional connection to Configuration Server Proxy instead of to Configuration Server.

3. Save your changes.

Next Steps

- Verify that customized and required options are set correctly. See the information and instructions in [Configuring Options for Genesys Info Mart](#).

Configuring Options for Genesys Info Mart

The default settings in the Genesys Info Mart application template provide a Genesys Info Mart

application that is suitable for a wide range of standard deployments. However, for reasons of performance or data quality or data availability, you might need to customize aspects of Genesys Info Mart functioning to suit your reporting requirements and the characteristics of your network and interaction flows.

The available Genesys Info Mart-related options are summarized in tables, grouped into the following broad categories:

- **Data-Processing Options for Genesys Info Mart** — Affect the content and quality of data that is stored in the Info Mart database.
- **Operations-Related Options for Genesys Info Mart** — Affect the day-to-day operations of the Genesys Info Mart components.
- **Genesys Info Mart Aggregation-Related Options for GCXI and RAA** — Enable aggregation in your deployment if GCXI or RAA is installed.

To use the configuration options information on the pages listed above:

1. Review the options in the various categories to identify the ones that are relevant for your purposes.
2. Refer to the [Genesys Info Mart Configuration Options Reference](#) to understand how a particular configuration option works and what functionality it enables.
3. Review the valid values, shown in the option descriptions, and determine the values that are appropriate for your environment.
4. Change option settings as required on the Genesys Info Mart application or other objects.

Except for the option that enables aggregation (aggregation-engine-class-name), all of the Genesys Info Mart application options take effect without requiring you to restart the application, so you can adjust Genesys Info Mart functioning during runtime without disrupting Genesys Info Mart operations. However, be aware that Genesys Info Mart functioning is complex and interrelated, and changing an option setting can have unintended and unexpected effects. As a general rule, Genesys recommends testing all changes to the default configuration in a lab environment, before you deploy them in production.

For information about additional, ICON-related options that affect Genesys Info Mart functioning, see [Preparing the ICON Application](#) and [Configuring Supporting Objects](#).

Customizing the Genesys Info Mart Configuration Settings

The following procedure describes how to customize your Genesys Info Mart configuration settings to best suit your environment. Refer to this information while you create your Genesys Info Mart application (see [Creating the Genesys Info Mart Application](#)), or refer to it after the initial configuration to perform additional customization.

To customize data processing for certain environments and various types of ICON details, you might also have to set options on other configuration objects, such as DNs. For more information, see [Configuring Supporting Objects](#).

Procedure: Setting the Genesys Info Mart application options

Purpose: To configure Genesys Info Mart application settings to suit your environment.

You specify configuration options on the **Options** tab of the Genesys Info Mart Application object. Options are specific to your application and release. They appear on the **Options** tab in sections that are related to specific functions.

Prerequisites

- The Genesys Info Mart application object has been created, as described in [Creating the Genesys Info Mart Application](#).

Steps

1. In the interface you use to configure your Genesys applications, open the Application object that you configured for your Genesys Info Mart. The **Application Properties** dialog box appears.
2. Select the **Options** tab.
3. If you plan to use the Genesys reporting presentation layer (GCXI) or the separately installed RAA package, review the options that are listed in the table of [Genesys Info Mart Aggregation-Related Options for GCXI and RAA](#), and change the default settings as required for your environment.
If you do not plan to use GCXI or RAA, ensure that these aggregation-related options retain their default values.

Important

The options that are listed in [Genesys Info Mart Aggregation-Related Options for GCXI and RAA](#) are necessary to enable aggregation in your Genesys Info Mart deployment, but not sufficient for GCXI reports. For more information about how to configure Genesys Info Mart to support aggregation, see the [Reporting and Analytics Aggregates Deployment Guide](#) for your release.

4. Configure the options that control the ETL process. Refer to [Operations-Related Options](#) for lists of relevant options and their default values.
5. Configure the options that affect the content and quality of data that is stored in the Info Mart database. Refer to [Data-Processing Options](#) for lists of relevant options and their default values.
6. (Optional) Customize the calendar dimensions:
 - To modify the default calendar to support the ISO 8601 standard for week numbering, modify the values of the simple-week-numbering, first-day-of-week, and min-days-in-first-week options in the **[date-time]** section on the **Options** tab.
 - To change the default calendar (which is a Gregorian one) to a fiscal calendar, modify the values of the fiscal-year-week-pattern and fiscal-year-start options in the **[date-time]**

section on the **Options** tab.

- To provide multiple, customized calendars, create additional **[date-time-*)** sections with the same options as in the **[date-time]** section, and configure the options as required for your reporting purposes.
7. After you set all of the desired options for your environment, click **Apply** to save your changes, and then click **OK** to close the **Applications Properties** dialog box.

Next Steps

- If you are creating additional calendars for reporting purposes, modify the **make_gim.sql** or **make_gim_partitioned.sql** script to create the custom calendar tables in the Info Mart database. For more information, see [Creating Custom Calendars](#).
- Otherwise, proceed to configuring ICON- and Genesys Info Mart-related options on other objects. See [Configuring Supporting Objects](#).