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# Genesys Info Mart Deployment Guide

Preparing and Installing the Genesys Info Mart Server

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# Preparing and Installing the Genesys Info Mart Server

This page provides detailed instructions for setting up the Genesys Info Mart Server host and installing the Genesys Info Mart Server application.

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## Preparing the Genesys Info Mart Server host

Review the [Before You Proceed](#) information and the high-level task summary on [Installing Genesys Info Mart](#). Then:

- If you want to use SCI to control the operation of the Genesys Info Mart Server, install, or verify the installation of, LCA. For more information, see [Installing LCA](#).
- Install the Java Development Kit (JDK) or Server Java Runtime Environment (JRE) and modify, or verify the content of, the **PATH** and the **JAVA\_HOME** environment variables. For more information, see [Installing Java](#).
- Install, or verify the installation of, a Java Database Connectivity (JDBC) driver for each RDBMS that Genesys Info Mart Server will access (Microsoft SQL Server, Oracle, or PostgreSQL). Modify, or verify the content of, the **CLASSPATH** environment variable. For more information, see [Installing JDBC Drivers](#).

## Installing LCA

If you plan to monitor or control Genesys Info Mart through the Management Layer, you must also configure and install Management Layer components — in particular, LCA.

To monitor the status of Genesys Info Mart components through the Management Layer, you must load an LCA instance on every host that is running Info Mart instances. Without LCA, the Management Layer cannot monitor the status of components.

If you do not use the Management Layer, you do not need LCA.

You will need a Genesys Management Framework product CD in order to install the components of the Management Layer. For more information about these Framework components, including deployment instructions, see the [Management Framework Deployment Guide](#) and the [Framework Management Layer User's Guide](#) for your release.

## Installing Java

Install the JDK or Server JRE on the Genesys Info Mart Server host, according to instructions in the Java documentation. For the Java versions that Genesys Info Mart supports, see the [Genesys Supported Operating Environment Reference Guide](#).

Then modify the **PATH** and the **JAVA\_HOME** environment variables:

- For Java on Windows:
  - If you plan to use SCI to start and stop Genesys Info Mart Server, you must modify the **PATH** and the **JAVA\_HOME** environment variables for either the system account or the user account under which you plan to start the LCA service.
  - If you plan to run the Genesys Info Server as a Windows service, you must modify the **PATH** and the **JAVA\_HOME** environment variables for either the system account or the user account under which you plan to start the Genesys Info Mart Server Windows service.

To modify the **PATH** environment variable, add <java-install-dir>\bin to the path (where <java-install-dir> is the path where you installed the JDK or Server JRE), so that it appears earlier in the path than any other reference to Java.

For the **JAVA\_HOME** environment variable, specify <java-install-dir>.

- For Java on UNIX:
  - If you plan to use LCA to start and stop Genesys Info Mart Server, you must modify the **PATH** and the **JAVA\_HOME** environment variables for the user account under which you plan to start the LCA service.
  - If you will not use LCA, you must modify the **PATH** and the **JAVA\_HOME** environment variables for the user account under which you plan to start Genesys Info Mart Server.

To modify the **PATH** environment variable, add <java-install-dir>/bin to the path (where <java-install-dir> is the path where you installed the JDK or Server JRE), so that it appears earlier in the path than any other reference to Java.

For the **JAVA\_HOME** environment variable, specify <java-install-dir>.

## Installing JDBC Drivers

- [JDBC Driver for Microsoft SQL Server](#)
- [JDBC Driver for Oracle](#)
- [JDBC Driver for PostgreSQL](#)

### JDBC Driver for Microsoft SQL Server

The Microsoft SQL Server Client is not shipped with a JDBC driver. Therefore, you must download and install the driver separately. The required driver is available from the Microsoft Download Center website by searching for “JDBC Driver.” Genesys Info Mart requires JDBC Driver 4.1 or higher.

Install the driver by following the installation instructions that are supplied with it. The name of the .jar file that contains the driver varies by version (for example, **sqljdbc41.jar** or **mssql-jdbc-6.2.2.jre8.jar**). Genesys recommends that you use an up-to-date version of the JDBC driver that is compatible with the SQL Server version you use (see [Microsoft JDBC Driver for SQL Server Support Matrix](#)).

After the installation, you must update the **CLASSPATH** environment variable to include the path to this .jar file. Add the following to the CLASSPATH environment variable:

```
<MSSQL-jdbc-driver-dir>\<jar>
```

where <MSSQL-jdbc-driver-dir> is the path where you installed the Microsoft SQL Server JDBC driver and <jar> is the name of the .jar file for the version. Do not include multiple versions of the same driver in the class path. If your deployment includes Reporting and Analytic Aggregates (RAA), see also [JDBC Driver for RAA](#), below.

### JDBC Driver for Oracle

You must use Oracle Thin Driver version 11.2.0.1.0 or higher, regardless of the Oracle RDBMS version that you are using. The required Type 4 JDBC thin client driver ships with the Oracle client, or you can download it from the Oracle website.

Install the driver by following the installation instructions that are supplied with it. The class name of the driver that Genesys Info Mart uses for Oracle is **oracle.jdbc.driver.OracleDriver**. This class is from the **ojdbc<java-version>.jar** file (for example, **ojdbc6.jar**).

You must also modify your **CLASSPATH** environment variable, so that Genesys Info Mart can locate the JDBC driver. The specific **CLASSPATH** environment variable that you modify depends on the operating system and user account under which the Genesys Info Mart Server runs. Do not include multiple versions of the same driver in the class path.

- On Windows:
  - If you plan to use SCI to start and stop Genesys Info Mart Server, you must modify the **CLASSPATH** environment variable for either the system account or the user account under which you plan to start the LCA service.
  - If you plan to run Genesys Info Mart Server as a Windows service, you must modify the **CLASSPATH** environment variable for either the system account or the user account under which you plan to start the Genesys Info Mart Server Windows service.

Add the following to the CLASSPATH environment variable:

```
<oracle-jdbc-driver-dir>\<jar>
```

where <oracle-jdbc-driver-dir> is the path where you installed the Oracle JDBC driver and <jar> is the name of the .jar file for the version.

- On UNIX:
  - If you plan to use SCI to start and stop Genesys Info Mart Server, you must modify the **CLASSPATH** environment variable for the user account under which you plan to start LCA.
  - If you will not use SCI, you must modify the **CLASSPATH** environment variable for the user account under which you plan to start Genesys Info Mart Server.

Add the following to the CLASSPATH environment variable:

```
<oracle-jdbc-driver-dir>/<jar>
```

where <oracle-jdbc-driver-dir> is the path where you installed the Oracle JDBC driver and <jar> is the name of the .jar file for the version.

If your deployment includes RAA, see also [JDBC Driver for RAA](#), below.

### JDBC Driver for PostgreSQL

You must download and install the JDBC driver. The required driver is available from the PostgreSQL website by searching for “JDBC Driver.” The following table lists the versions of the JDBC driver that are recommended for supported versions of the PostgreSQL RDBMS.

PostgreSQL	JDBC Driver	Comments
Releases earlier than 9.6	9.3-1101	Releases earlier than 9.6 are not supported as of June 30, 2020 (Genesys Info Mart 8.5.015.14).
9.6	9.4.1212	
10	42.2.2	
11	42.3.2	
12, 13	42.3.2	

Install the driver by following the installation instructions that are supplied with it. The name of the .jar file that contains the driver varies by version (for example, **postgresql-9.4.1212.jar**). After the installation, you must update the **CLASSPATH** environment variable to include this .jar file.

Add the following to the CLASSPATH environment variable:

```
<PostgreSQL-jdbc-driver-dir>\<jar>
```

where <PostgreSQL-jdbc-driver-dir> is the path where you installed the PostgreSQL JDBC driver and <jar> is the name of the .jar file for the version. Do not include multiple versions of the same driver in the class path. If your deployment includes RAA, see also [JDBC Driver for RAA](#), below.

### JDBC Driver for RAA

The RAA installation package (IP) includes a default JDBC driver for each RDBMS in the **agg\lib** subdirectory of the RAA installation directory. It is important to ensure that RAA is configured to use the same JDBC driver version as Genesys Info Mart. Otherwise, because of the order in which the class path is set in the **gim\_etl\_paths** startup file, Genesys Info Mart will use the default JDBC driver RAA provides, instead of the .jar file specified in the **CLASSPATH** environment variable.

Starting with RAA release 8.5.006, RAA enables you to use symbolic links to maintain consistency between the JDBC driver versions for Genesys Info Mart and RAA. For full information, see [Configuring the JDBC Driver for RAA](#) in the *Reporting and Analytics Aggregates 8.5 Deployment Guide*.

If your deployment includes RAA releases earlier than 8.5.006 and you want Genesys Info Mart to use a JDBC driver version that is later than the version provided in the RAA IP, contact [Genesys Customer Care](#) for information about how you can enforce use of the desired version.

## Installing the Genesys Info Mart Application

You can install the Genesys Info Mart application on either a Windows or a UNIX operating system.

### Windows

### Installing the Genesys Info Mart application (Windows)

When you install Genesys Info Mart on a Windows operating system, Genesys Info Mart is also installed as a Windows service with a startup type of Automatic. This means that if the host machine is restarted, the Windows service will start Genesys Info Mart automatically.

The following procedure provides step-by-step instructions for installing Genesys Info Mart. You can install more than one Genesys Info Mart application that you have configured in the configuration interface you use.

#### Procedure: Installing the Genesys Info Mart application on Windows

##### Prerequisites

- You have created and configured a Genesys Info Mart Application object in the interface you use for configuration, as described in [Configuring the Genesys Info Mart Application](#).
- The host has been prepared, as described in [Preparing the Genesys Info Mart Server Host](#).

##### Steps

1. Insert the Genesys Info Mart CD into the CD-ROM drive of the machine on which you want to install Genesys Info Mart.
2. Navigate to, and open, the **genesys-info-mart\windows** directory.
3. Double-click the **setup.exe** file, and then follow the directions in the installation wizard.

##### Warning

If you are installing on a 64-bit operating system, Genesys recommends that you specify an installation folder under **/gcti/gim\_etl/**. There must not be any parentheses in the path name. For example, if you specify an installation folder under **/Program Files (x86)/**, the installation will fail.

If you want to enable client-side port definition for the initial connection to Configuration Server, specify the required parameters on the **Client Side Port Configuration** page in the wizard. For more information, see the instructions on [Client-Side Port Definition](#) in the *Genesys Security Deployment Guide* for your release.

### Tip

The following error message might appear. If it does, you should ignore it: Unable to find configuration information. Either you have not used configuration wizards and the GCTISetup.ini file was not created or the file is corrupted.

### Next Steps

- Verify the Genesys Info Mart host setup. See [Verifying Host Requirements](#).
- Review the default startup arguments for the Genesys Info Mart application, and modify them if necessary. For more information about supported startup arguments and how to use them, see [Command-Line Parameters](#) and [Modifying the Genesys Info Mart Default Arguments](#).
- Install Genesys Info Mart Manager, as described in [Installing Genesys Info Mart Manager](#).

## UNIX

### Installing the Genesys Info Mart application (UNIX)

The following procedure provides step-by-step instructions for installing Genesys Info Mart. You can install more than one Genesys Info Mart application that you have configured in the configuration interface you use.

### Procedure: Installing the Genesys Info Mart application on UNIX

#### Prerequisites

- You have created and configured a Genesys Info Mart Application object in the interface you use for configuration, as described in [Configuring the Genesys Info Mart Application](#).
- The host has been prepared, as described in [Preparing the Genesys Info Mart Server Host](#).



### Steps

1. Insert the Genesys Info Mart CD into the CD-ROM drive of the machine on which you want to install Genesys Info Mart.
2. Locate the correct installation directory for your platform — for example, **genesys\_info\_mart/gim\_etl/solaris**.
3. Save the contents of this directory to a local folder.
4. Locate and run the **install.sh** shell script. Enter requested information when you are prompted to do so.

If you want to enable client-side port definition for the initial connection to Configuration Server, specify the required parameters when you get the **Client Side Port Configuration** prompt in the wizard. For more information, see the instructions on [Client-Side Port Definition](#) in the *Genesys Security Deployment Guide* for your release.

### Next Steps

- Verify the Genesys Info Mart host setup. See [Verifying Host Requirements](#).
- Review the available startup arguments for the Genesys Info Mart application, and modify them if you wish. For more information, see [Command-Line Parameters](#) and [Modifying the Genesys Info Mart Default Arguments](#).
- Install Genesys Info Mart Manager, as described in [Installing Genesys Info Mart Manager](#).

## Verifying Host Requirements

As described in [Preparing the Genesys Info Mart Server Host](#), Genesys Info Mart has specific requirements for supporting system software components and operational parameters, such as JDBC drivers and environment variables. This section describes important system information that you cannot verify or modify before installation.

### `gim_etl_paths.bat` File

After the installation, verify that the path in the **gim\_etl\_paths.bat** file correctly points to the Java executable. For example:

```
set JAVACMD=java.exe
```

Update the path in the **gim\_etl\_paths.bat** file, if necessary.

For related information about modifying the **PATH** and **JAVA\_HOME** environment variables, see [Installing Java](#).

## Modifying the Configuration Checkup Properties File

On startup, or whenever the configuration of the Genesys Info Mart application changes, the Genesys Info Mart Server automatically performs a configuration check, which can include verification that the installed JDBC driver version matches or exceeds a specified minimum version. If the available version is not as specified in a properties file (**`gim_cfg_checkup.properties`**), the configuration check logs an error, and the Genesys Info Mart Server will not run any jobs until the error has been fixed. If no version for the particular RDBMS is specified in the properties file, the configuration check effectively skips this check.

By default, the properties file specifies the required minimum version of Oracle Thin Driver (`oracle.jdbc.driver.OracleDriver=11.2.0.1.0`). For later Oracle versions, for Microsoft SQL Server deployments, or for PostgreSQL, Genesys recommends that you modify the properties file to specify the installed version of the driver for Genesys Info Mart to use. After installation, the **`gim_cfg_checkup.properties`** file is available in the **resources** subfolder in the Genesys Info Mart installation folder.