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Decisions Administration Guide

Decisions Data Mart

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Decisions Data Mart

The Decisions Data Mart is a separate database from the Decisions database. It has an open schema and is available for use with any reporting/BI tool outside of the Decisions application. Imported history is synchronized with the Data Mart so that the latest history is always available for reporting. Users can publish their scenarios to the Data Mart for easy reporting across multiple scenarios as well as history.

There are two roles built into the Decisions Data Mart. To access Data Mart, a user must be in one of the roles. The roles are:

- DataMart Admins
 - Data Mart administrators can enable and disable Data Mart security, add and delete users, and can share any folder with any user.
 - To be a Data Mart administrator, the SQL user must be assigned the DataMartAdmins database role.
 - A user that is only a member of the DataMartAdmins database role does not have access to the actual data inside the Data Mart, they will not be able to report on the data. A member of the DataMartAdmins database role only has access to those artifacts needed to perform administrative tasks.
- DataMart Users
 - Data Mart users are those users who either need to publish data to the Data Mart from the Genesys Decisions application, or report on data from the Data Mart.
 - To be a Data Mart user, the SQL user must be assigned the DataMartUsers database role.

Configure Data Mart

Log in to the Decisions administration application, click the **Data Mart** button to open the **Manage Data Mart** window or click **Settings > Data Mart**, and perform the following tasks in order:

- [Enable and Disable Security](#)
- [Add and Delete Data Mart Users](#)
- [Manage Data Mart Folder Permissions](#)

Enable and Disable Security

Only a Data Mart administrator can enable and disable security for the Decisions Data Mart. Security is disabled by default.

In the Decisions administration application, click the **Data Mart** button to open the **Manage Data Mart** window. Alternatively, use the **Settings > Data Mart** menu to open the **Manage Data Mart**

window. Security is enabled when add a check mark to the **Enable Data Mart Security** box. To disable security, clear the check box.

When Data Mart security is disabled:

- Every user who has the DataMartUsers role in the Data Mart database can access (view, publish, and delete) data in the Decisions Data Mart.
- Only the Public folders are available.
- **Data Mart Explorer** is not available in the administration application.

When Data Mart security is enabled:

- For each user who requires access to data in Decisions Data Mart, an administrator must add the user to the Data Mart.
- A Data Mart administrator can add users to the Data Mart and allow them permission to publish to or report from the Data Mart using the **Manage Data Mart** window.
- Public folders are available.
- Each user has a folder within the **home** folder that is private to the specific user.
- User folders within the **home** folder can be shared with other Data Mart users.

Add and Delete Data Mart Users

For a user to be able to publish a scenario to the Decisions Data Mart, that user must have his or her account added to the Data Mart. This account is the Windows login that he or she uses when accessing the Decisions application. It is not the username that this user enters on the login screen for the Decisions application. In addition, a user who needs to report on data, but who will not publish, must have his or her account added to the Data Mart, as well. This could be the user's Windows login or MS SQL Server login; it depends on how the use will access data in the Data Mart.

To add a new Data Mart user:

1. In the Decisions administration application, click the **Data Mart** button to open the **Manage Data Mart** window. Alternatively, use the **Settings > Data Mart** menu.
2. On the **Manage Data Mart** window, enter the username of the new user in the text field, and click **Add**.
The username that you enter must be either a Windows login or an MS SQL Server login.

Delete a Data Mart User

To delete a Data Mart user:

1. In the **Manage Data Mart** window, click the X beside the user's name.
All empty folders will be deleted.
2. If data was published to the folder, then you will be prompted to select another user to manage this folder. This is done to ensure data is not lost when users are deleted.

Manage Data Mart Folders

In the Decisions administration application, click the **Data Mart** button to open the **Manage Data Mart** window. Alternatively, use the **Settings > Data Mart** menu. On the **Manage Data Mart** window, click the **Manage Folder Permissions** button. The **Data Mart Explorer** window opens. You manage folders and permissions in the **Data Mart Explorer**.

Data Mart Explorer displays the hierarchical structure of folders on your Data Mart. Users can access **Data Mart Explorer** in the Decisions Planning application, as well.

Folder Hierarchy

The folder hierarchy that displays in the **Data Mart Explorer** window has the following characteristics:

- **root** folder:
 - Contains the **home**, **Public**, and **Synchronization** folders.
- **home** folder (displays only when Data Mart security is enabled):
 - Contains a separate folder for each user.
 - Scenarios can be published to the user folders.
- **Public** folder:
 - Every user who has the DataMartUsers role in the Data Mart database can access the **Public** folder.
 - Scenarios can be published to these folders.
- **Synchronization** folder:
 - Contains the historical data and configuration information that has been synchronized from the Decisions database.

Sharing Folders

To share a user's folder that exists within the **home** folder in the Decisions Data Mart, open the **Data Mart Explorer** window. Right-click the user folder to be shared and select **Share Folder** from the shortcut menu. In the **Share Folder** dialog box, type the name of the user with whom the folder will be shared. Alternatively, click the drop-down arrow in the text field to find the user. The drop-down list includes all Data Mart users.

Specify the permission levels for the user with whom you are sharing the folder. Click the drop-down arrow to open the shortcut menu, which contains the following permission level options:

- **Report**: Allows a user to select data from available data sources.
- **Publish/Report**: In addition to what is available when a user is assigned the Report permission, the Publish/Report permission also allows a user to publish data to a data source, create/delete/rename,

or cut/copy a data source.

- **Manage/Publish/Report:** In addition to what is available when a user is assigned the Publish/Report permission, the Manage/Publish/Report permission also allows a user to create/delete/rename or cut/copy a folder.
- **Remove:** Removes the user's previously-assigned permission level.

Data Mart FAQs

- What happens if a user leaves the company?
 - If security is turned off, then there is nothing that you need to do. If security is turned on, then you can delete the user using the **Manage Data Mart** window in the Decisions administration application.
If the user had published any data to their home folder, you will be prompted to assign another user as the manager of the folder. This allows for continuity by allowing other users to publish reports or modify content from the employee that is no longer with the company.
For more information, see [Add and Delete Data Mart Users](#).
- What happens when a user is on vacation and another user needs to access the data in their private home folder?
 - As an administrator, you can grant permissions on any folder. Use the **Data Mart Explorer** window to find the appropriate folder, and then add the required permissions using the **Share Folder** shortcut menu.
For more information, see [Sharing Folders](#).
- What happens if you disable security?
 - When security is disabled, the **home** folders are no longer accessible to anyone. The **Public** folder is still available. Genesys' best practice is to have the Data Mart users check to see if there is any data that they would want to retain in their **home** folder. They can move or copy the data into the **Public** folder so that it will still be available after security is turned off.
For more information, see [Enable and Disable Security](#).