Genesys Info Mart Deployment Guide

Overview: Deploying Genesys Info Mart

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Deploying Genesys Info Mart is a complex task because it involves a number of components, such as Interaction Concentrator, the Genesys Info Mart Server, the Genesys Info Mart Manager, and databases. It also involves components in the Genesys Configuration Layer, Management Layer, and Media Layer. Before you start the deployment, review the following high-level task flow carefully, and make sure that you understand all of the activities that are involved in planning and executing the Genesys Info Mart deployment.

Similar high-level summaries linked to under Enabling Specific Functionality provide faceted overviews for specific functionality.

1. **Plan the deployment.**
   Review the general, planning-related information in this guide to familiarize yourself with Genesys Info Mart architecture, requirements, and functionality, and to plan the implementation of Genesys Info Mart features in your deployment.
   [+] Show general overview and planning pages

   The following pages in the *Genesys Info Mart Deployment Guide* provide general information that is relevant for planning purposes:

   - Architecture

   - Components

   - Features and Functionality

   - System Requirements

   - Supported Topologies

   - Recommendations on Hosting

   - Database Considerations

   - Database Privileges

   - Multimedia Interactions

   - Genesys Info Mart and Attached User Data and related links

   - Outbound Contact Data

   If you want to include secure connection features, review the information about Transport Layer Security (TLS) and client-side port definition in the *Genesys Security Deployment Guide*, to identify deployment requirements. See also Enabling Secure Connections.

   This guide provides the following worksheets to assist you in identifying and recording the required configuration information for your environment:

   - Database Worksheets

   - Mapping User Data Worksheet

   - Mapping OCS Record Fields Worksheet

2. **Prepare** Interaction Concentrator **to provide source data for Genesys Info Mart.**

a. Prepare the Interaction Concentrator server (ICON) application(s), which capture and store data from data sources such as Configuration Server and T-Server. For detailed information, see Preparing the ICON Application.

> ## Important
> You might have to configure additional, ICON-related settings on supporting objects to enable specific functionality. For more information, see step 6, below.

b. Prepare the Interaction Database (IDB) instance(s) from which Genesys Info Mart will obtain data. For detailed information, see Preparing IDBs.

c. Prepare the database access point (DAP) application(s) that enable ICON to access the IDB(s) it populates. For more information, see the *Interaction Concentrator Deployment Guide* for your release.

d. Ensure that the ICON applications and all required data sources have been enabled, to identify them to Genesys Info Mart as available.

To enable specific functionality, such as support for Outbound Contact details or high availability (HA), see also the task summaries under Enabling Specific Functionality.

3. **Prepare the target Genesys Info Mart database and views.**
Create and configure database schemas to process and store detailed reporting data. For detailed information, see:

- Preparing the Info Mart Database

- Optimizing Database Performance: Database Links

- Optimizing Database Performance: Database Tuning

4. **Configure the database access points (DAPs) that Genesys Info Mart uses to access source and target databases.**
Create DAPs, or modify the configuration of existing DAPs, to enable:

- Genesys Info Mart Server to access the IDBs.

- Genesys Info Mart Server to access the Info Mart database.

For detailed information, see Enabling Database Access and Configuring Required DAPs.

5. **Configure the Genesys Info Mart Server application.**

a. Import the required Application Template for the Genesys Info Mart application.

b. Create and configure an Application object for Genesys Info Mart Server.

The required configuration settings depend directly on the Genesys Info Mart features that you want to implement and on your choice of an end-user reporting tool, such as Genesys CX Insights (GCXI).

For more information, see Configuring the Genesys Info Mart Application.

To enable specific functionality, such as support for Outbound Contact details or high availability (HA), see the task summaries on Enabling Specific Functionality.

6. **Configure necessary options in other configuration objects that are required by ICON and**

Genesys Info Mart.
Depending on the characteristics of your deployment and your reporting needs, you might need to configure options in the following objects:

- Switch (for Voice and Multimedia details) — see Procedure: Configuring the switch for ICON and Genesys Info Mart reporting.

- Media Type Business Attribute (for Multimedia details) — see Procedure: Setting Media Type Business Attribute object options for Genesys Info Mart reporting.

- DN (for Voice and Multimedia details) — see Procedure: Configuring a DN for ICON and Genesys Info Mart reporting.

- Script (for Multimedia details) — see Procedure: Setting Script object options for Genesys Info Mart reporting.

- Field (for Outbound Contact details) — see Configuring Field Objects.

7. **Prepare the Genesys Info Mart Server host. See Preparing the Genesys Info Mart Server Host.**

8. **Install the Genesys Info Mart components.**

   a. Install the Genesys Info Mart application on its host. For more information, see Installing the Genesys Info Mart application (Windows) or Installing the Genesys Info Mart application (UNIX).

   b. Verify the host setup. See Verifying Host Requirements.

   c. Install the Genesys Info Mart Manager management GUI. See Installing Genesys Info Mart Manager.

9. **Complete the basic deployment.**
   Perform post-installation activities:

   a. Start Genesys Info Mart. For more information, see Starting and Stopping Genesys Info Mart Server.

   b. Review Genesys Info Mart logs to verify that the deployment is complete and configuration is correct.

   c. In Genesys Info Mart Manager, review the status of **Job_InitializeGIM** to verify successful initialization of the database and successful update of the IDBs. To access Genesys Info Mart Manager, see Accessing Genesys Info Mart Manager.

   d. Review Completing Database Preparation, particularly Creating Read-Only Tenant Views. Tenant-specific, read-only views on the Info Mart database are required for multi-tenant deployments (optional for single-tenant deployments).

   e. Continue managing Genesys Info Mart jobs through Genesys Info Mart Manager. For more information about using Genesys Info Mart Manager and managing jobs, see Managing and Scheduling Jobs in the *Genesys Info Mart Operations Guide*.

10. **(Optional) Enable aggregation. For more information, see Enabling Aggregation.**

> Important

If GCXI is your end-user reporting tool, you must enable aggregation.

Enabling Specific Functionality

The following pages, which partially replicate the above information, provide high-level summaries of targeted task flows to enable Genesys Info Mart to support various specific functions:

- Enabling Reporting on Configuration Details
- Enabling Reporting on Voice Activity
- Enabling Reporting on Multimedia Activity
- Enabling Reporting on Outbound Contact Activity
- Enabling Reporting on User Data
- Enabling Reporting on Callback Activity
- Enabling High Availability
- Enabling Secure Connections
- Enabling Aggregation