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Genesys Info Mart Deployment Guide

Genesys Info Mart and Attached User Data

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Genesys Info Mart uses attached data key-value pairs (KVPs) to populate several of its fact and dimension tables, including any number of custom-created tables. This page provides a summary of the planning activities required to ensure you use attached user data effectively in your Genesys Info Mart deployment.

IVR applications, Enterprise Routing Solution, Network Routing Solution, Outbound Contact Solution, Genesys eServices/Multimedia solution, and Agent Desktop applications all attach KVPs to interactions. The KVPs that these applications attach depend on the following factors:

- Your deployment's interaction flows
- The information that is required by the resources that handle the interactions
- The information that you want to report

Genesys recommends that you configure upstream applications to attach KVPs as early in the interaction flow as possible. In this way, key interaction attributes are captured, even if the interaction is abandoned.

Tip

To ensure that applications use certain attributes consistently (for example, `CustomerSegment`, `ServiceType`, and `ServiceObjective`), configure values for them in the interface you use to configure your Genesys objects. For more information about how to configure these attributes, see the Help for the configuration interface you are using — [Configuration Manager Help \(8.1\)](#), [Genesys Administrator Help](#), or [Genesys Administrator Extension Help](#).

Planning for User Data Reporting

Business analysts, report developers, and database administrators (DBAs) need to collaborate to plan user-data reporting. As part of deployment planning:

1. Review the high-level algorithm for processing user data in Genesys Info Mart. See [Processing User Data](#).
2. Have your Business Analyst evaluate what business attributes need to be stored for your contact center reporting purposes.
3. Have your Report Developer:
 - a. Research how to enable respective applications to attach required KVPs. See [User Data Sources and KVPs](#) and [Using UserEvent-Based KVP Data](#) for information. Refer to the documentation for Genesys

solutions, if necessary. Ensure that the respective KVPs have been defined for the required business attributes and that the respective applications have been configured to attach the required KVPs.

- b. Research how to enable ICON to store required KVPs in IDB. Refer to [Customizing Attached Data Storage](#) and the [Interaction Concentrator documentation](#), as necessary.
 - c. Based on expected degrees of cardinality, decide which custom KVPs to store as facts and which to store as dimensions. For more information, see the discussion of cardinality under [Storing User Data](#).
 - d. Based on business rules and reporting requirements for the values of KVPs at different stages of the interaction, decide which propagation rule to use for each KVP. For more information, see [Propagation Rules](#).
 - e. Decide what default values to use for custom user-data facts. For information about when Genesys Info Mart uses the default values, see [Processing User Data](#).
4. Have your DBA:
- a. Decide what custom fact and dimension tables, if any, you require to store user data values. See [Storing User Data](#).
 - b. For custom user-data facts, decide what KVP values, if any, you want to store as numeric or as date/time data (as supported by your RDBMS). Interaction Concentrator stores user data as character data, but Genesys Info Mart stores KVP values in custom user-data fact tables as character, numeric, or date/time data types, depending on the way that you define the column in the Info Mart schema (see [Step 4\(d\)](#)).
 - c. Map the KVPs to custom user-data tables and columns in the Info Mart database. You can use the [User Data Assistant](#) to help you perform the mapping and prepare the required SQL script.

To map the KVPs manually, fill out a User Data Mapping worksheet, to use with your user data template script at the time of deployment. See [Mapping Call-Based Attached Key-Value Pairs](#) for information and [Mapping User Data Worksheet](#) for a sample worksheet.
 - d. Prepare your copy of the **make_gim_UDE_template.sql** or **make_gim_UDE_template_partitioned.sql** template script to use to create custom user-data tables and columns when you deploy the database. See [Preparing Custom User-Data Storage](#).