Genesys Info Mart

Genesys Info Mart 8.5.1 Deployment Procedure

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This deployment procedure applies to all 8.5.1 releases of Genesys Info Mart listed in the 8.5.1 Release table. Most releases use the same standard deployment procedure.

Standard Deployment Procedure for Migrating to 8.5.1

To deploy this installation package within a new environment, follow the instructions in the *Genesys Info Mart Deployment Guide.*

To deploy this package in your existing Genesys Info Mart 8.x environment, follow all of the Recommendations, Prerequisites, and Deployment steps in the Standard Deployment Procedure that follows.

Recommendations

- Review all steps before you perform any of them.

- Plan a time when you can complete the installation in one continuous session. Some steps can take significant time to complete, and this potentially affects the availability of Info Mart data.

- The Interaction Database (IDB) schema might need to be updated as part of the migration. To minimize the possibility of deadlocks or concurrency problems, plan to execute your migration at a time when there is little activity on the IDBs, such as during off-peak hours or after hours (but not during IDB maintenance, when purge stored procedures will be running).

- If you are migrating Genesys Info Mart in a deployment in which you use or plan to use Genesys-provided aggregation, review the Reporting and Analytics Aggregates (RAA) and Genesys CX Insights (GCXI) Release Notes and Release Advisories, for information about the impact of Genesys Info Mart migration on aggregation, as well as workarounds or additional steps to take during Genesys Info Mart migration.

- In deployments with PostgreSQL RDBMS, migration from an 8.1.x to an 8.5.x release might take a significant amount of time because the migration job has to add and populate new CREATE_AUDIT_KEY and UPDATE_AUDIT_KEY columns in the existing user-data fact extension tables in the Info Mart database.

- If you use Call Detail Record (CDR) data reporting and choose to customize the supplementary CDR_DATE_TIME view, observe the following recommendations:

  - Always perform customization in a copy of the view.

  - When deploying subsequent releases of Genesys Info Mart, evaluate any changes the new release introduces to the CDR_DATE_TIME view, to see how those changes may impact your customization.

- If you use the Data Export capability without using export views, review the "New in the Info Mart Database" and "Summary of Info Mart Schema Changes" pages in the *Genesys Info Mart Physical Data Model* for your RDBMS, to identify whether schema changes in the new release will cause problems for your import and consumption queries. You might need to update your target schema and change the import processing to accommodate the new Info Mart schema, or you might decide to start using export views so as to freeze the pre-migration schema for export purposes. In the latter case, you will need to execute the migration job in a specific way during the migration process, as described in Creating or updating export views in the *Genesys Info Mart Operations Guide.*

Prerequisites

1. For reference purposes, identify and make notes of any custom changes that you made to the Info Mart database—for example, table spaces, partitions, additional indexes, views, or permissions.

   The Genesys Info Mart SQL scripts that you will run to update these databases sometimes create new tables, instead of updating the old tables. They may also replace some tables with views, for backward compatibility.

   You will need to re-create any custom database objects or permissions that become lost or invalidated during the update process.

2. For reference purposes, create backup copies of the Genesys Info Mart deployment SQL scripts that you modified and ran when you last deployed Genesys Info Mart. The new Genesys Info Mart installation program overwrites these SQL scripts, and does not preserve your modifications.

   The default location for these scripts is the `sql_scripts` directory within the Genesys Info Mart installation directory.

3. For reference purposes, identify and make notes of any custom changes that you made to the Genesys Info Mart `Application` object. You might need to transfer customizations in your Genesys Info Mart deployment for the new Genesys Info Mart release.

4. Make a note of the application startup arguments if you customized them. The installation process will overwrite these arguments and you will lose any changes that you made.

5. In Microsoft SQL Server deployments, if the Info Mart schema is not dbo, contact Genesys Customer Care before proceeding.

6. In PostgreSQL deployments, if your deployment includes tenant views and you are migrating from a release earlier than 8.5.007, re-create the tenant views using the **make_gim_view_for_tenant.sql** script included in the Installation Package (IP) for release 8.5.009 or later. (Starting with release 8.5.009, the **make_gim_view_for_tenant.sql** script requires you to specify additional database user parameters that the migration job needs to use.) You might need to adjust database permissions for the Info Mart database user before running the script. For more information, see Required Database Privileges and Creating Read-Only Views – PostgreSQL in the *Genesys Info Mart Deployment Guide*.

7. Set the `run-scheduler` configuration option to FALSE in the `[schedule]` section of the Genesys Info Mart `Application` object to temporarily stop Genesys Info Mart Server from launching ETL jobs.

   If your system includes a second instance of Genesys Info Mart Server in the active-active configuration, ensure that the ETL cycle has been suspended on both servers, to prevent possible concurrency problems if the IDB(s) need to be updated as part of the migration and the second Genesys Info Mart Server attempts to extract from an IDB while the `update_IDB` script is running.

   Note: Stopping the Genesys Info Mart server does not result in data loss. As long as all ongoing interaction data is stored in IDBs, Genesys Info Mart will process that data after you complete the migration.

8. If you are using Genesys-provided aggregation, stop the aggregation job. If the aggregation job is running in automated mode:

   a. Set the `run-aggregates` option to FALSE in the `[schedule]` section of the Genesys Info Mart `Application` object.

   b. Stop the aggregation job from the Genesys Info Mart Manager.

9. Wait for any currently running jobs to finish. Use the Genesys Info Mart Manager to monitor completion of the jobs. To do so, open Genesys Info Mart Manager and periodically click `Refresh` to check the updated status of the jobs.

   Note: The aggregation job might take a long time to complete. If this is the case, proceed with the next step as soon as all other jobs finish.

10. Stop the Genesys Info Mart Server.

11. Create a backup copy of your Info Mart database.

12. If you are deploying Genesys Info Mart 8.5.002.09 or later, ensure that the following Interaction Concentrator (ICON) configuration options are set to the recommended values:

    - **route-res-vqid-hist-enabled**—must be set to `true` (if ICON records Voice or Multimedia details)

    - **cseq-adjustment**—must be set to 2 (if ICON records Voice details)

13. If necessary, migrate ICON. For information about the minimum ICON release that is required for the Genesys Info Mart release to which you are migrating, see the *Release Notes* page for that particular release.

Deployment Steps

1. Install the new Genesys Info Mart installation package:

    - On a Microsoft Windows operating system, uninstall the current Genesys Info Mart installation package using the Windows `Control Panel > Add/Remove Programs`.

      Then run `setup` to install the new Genesys Info Mart installation package.

    - On a UNIX operating system, run the new Genesys Info Mart installation script. When prompted, select the appropriate action to overwrite existing files (for example, `Overwrite only the files contained in this package`).

2. In the Release Note, review the "New in This Release" section for the release to which you are upgrading. Identify if any configuration option changes affect customizations that you may have made in your Genesys Info Mart deployment. If necessary, modify configuration settings in the Genesys Info Mart `Application` or other configuration objects, as required, to transfer custom settings for your deployment.

    If the ICON attached-data specification file is updated in the Genesys Info Mart IP to capture additional KVPs to support a new reporting feature, evaluate whether these additions are applicable to your environment. Upload the new version of the attached-data specification file (**ccon_adata_spec_GIM_example.xml**) into your environment or update your copy with necessary KVP additions.

    Starting with release 8.1.x, Genesys Info Mart no longer uses relative values to determine when calendar dimensions start (for example, `date-time-start-year = -1` is no longer valid), verify the validity of the `date-time-start-year` setting for existing calendars. If you used a relative value for the `date-time-start-year` option in the [date-time] and any custom [date-time-*] sections in a prior release, change the setting to the appropriate absolute value. Otherwise, an error will be generated when Genesys Info Mart performs the configuration check.

3. (For Oracle users only) If you are migrating from a release earlier than 8.1.103.05, grant permissions to the Info Mart database user by issuing the following commands against the Info Mart database:

    ```
    GRANT
      CREATE SESSION,
      CREATE PROCEDURE,
      CREATE SEQUENCE,
      CREATE TABLE,
      CREATE VIEW to <Info Mart user>;
    GRANT EXECUTE ON DBMS_LOCK to <Info Mart user>;
    ```

4. Restore any customizations in startup arguments, start the Genesys Info Mart Server, and check for error messages:

    - Check for errors either using Genesys Info Mart Manager or by reviewing the Genesys Info Mart log. If Genesys Info Mart Manager displays the error "`InfoMart database schema version is out-of-date`," or if you find log message 55-20152 ("`GIM Server - current state is MIGRATION`") or 55-20034 ("`...database schema version...is not up to date...`"), you must run `Job_MigrateGIM` to upgrade the Info Mart database schema and, if necessary, automatically execute the scripts to update IDBs. Continue with Step 5.

    - If you do *not* find the error "`InfoMart database schema version is out-of-date`" or log message 55-20152 or 55-20034, continue with Step 9.

    Notes:

    - Genesys recommends that you set an alarm condition for log event 55-20152.

    - Beginning with release 8.5.007, it is possible to configure Genesys Info Mart to run Job_MigrateGIM automatically when required, using the configuration option, on-demand-migration in the **[schedule]** section. However, Genesys does not recommend enabling migration on demand unless policies and procedures are in place to ensure that essential pre-migration and post-migration steps are also performed without manual intervention — for example, frequent database backup and re-creation of read-only views following migration.

5. If you need to run `Job_MigrateGIM,` Genesys Info Mart Server will automatically be in the correct state to perform the migration.

Warning! From this point onward, the Info Mart database should not be accessed by report queries or other scheduled activities, such as custom aggregation, until the migration job is complete. Doing otherwise would interfere with the migration process, which will be modifying database tables, views, and indexes. If your system includes a second instance of Genesys Info Mart Server in the active-active configuration, ensure that the ETL cycle has been suspended on both servers.

Launch `Job_MigrateGIM` from the Genesys Info Mart Manager. To do so, perform the following steps:

a. Open the Genesys Info Mart Manager.

b. Click `Run Job` to open the `Run Job` dialog box.

c. Select `Job_MigrateGIM`.

d. Click `OK`.

Allow this job to complete before continuing.

Notes:

- If `Job_MigrateGIM` does not complete successfully, do the following:

  a. Stop Genesys Info Mart Server.

  b. Analyze the problem by referring to the log file, and resolve any issues. If `Job_MigrateGIM` failed because of deadlocks or concurrency problems on IDB, there are additional steps you might be able to take to prevent such issues. For more information, see "Preventing Deadlocks on IDB During Genesys Info Mart Migration" in the "Genesys Info Mart 8.x Migration Procedures" chapter in the *Genesys Migration Guide.*

  c. Retry the migration starting from Step 4, above (restarting Genesys Info Mart Server). If problems persist, restore the Genesys Info Mart database from the backup copy and then retry the migration again.

- If you decide to terminate the migration process, follow the Rollback Procedure.

- If you attempt to run `Job_MigrateGIM` when you do not need to do so, Genesys Info Mart will silently ignore the command to launch the job.

6. If you stopped ICON as part of the migration preliminaries related to preventing deadlocks or concurrency problems on IDB, start ICON.

7. If your deployment uses read-only views, you must re-create the read-only views after the migration job completes. For more information, see Creating Read-Only Views for your RDBMS in the *Genesys Info Mart Deployment Guide*. In a PostgreSQL deployment, ensure that you use the **make_gim_view_for_tenant.sql** script from release 8.5.009 or later to re-create the views.

8. If your deployment uses Genesys-provided aggregation, in addition to re-creating the Info Mart tenant views (see Step 7), you must also update the tenant aliases. For more information, see the description of the `updateAliases` runtime parameter in the *Reporting and Analytics Aggregates Deployment Guide* and the section about updating tenant aliases in the *Reporting and Analytics Aggregates User's Guide.*

9. Review the "New in This Release" sections in the Release Notes and make any changes to the database schema values or to downstream reporting applications that may require action as part of the migration process.

- For example, if you rely on agent thread metrics for your reports (for example, AG2_ID_*.ACCEPTED_THREAD metrics in GCXI reports), set the `populate-thread-facts` configuration option to true. When `populate-thread-facts = false`, the FIRST_*_THRD fields in the ANCHOR_FLAG dimension will be ignored for the purposes of populating the IRF.ANCHOR_FLAGS_KEY metric in the Info Mart database. Note, however, that enabling thread processing might negatively impact performance of downstream reporting applications.

- If you are migrating to release 8.5.x directly from release 8.0.0, you might need to check the values of the `IS_ONLINE` column in the `MEDIA_TYPE` table to see whether all media types are correctly identified as online (real-time communication, such as chat) or offline (responses may be deferred, such as e-mail).

- Be aware that Genesys Info Mart migration does not go back to manipulate existing data (in other words, data that was processed before migration). In particular:

  - Where new columns have been added, they are not populated for existing data.

- Any changes to the scope of a particular field, or the logic behind its population, are not reflected in existing data.

- If you are migrating from release 8.1.0 or 8.1.1, be aware that Genesys Info Mart creates new `CTL_AUDIT_LOG` and `CTL_*_HISTORY` tables during the migration. Genesys Info Mart renames the existing tables to `CTL_*_BK` and retains them for reference.

  - If you use the `CTL_AUDIT_LOG` table for postprocessing (for example, to move data from the Info Mart database to a data warehouse or to support custom aggregation), verify that `CTL_AUDIT_LOG_BK` does not contain any unprocessed audit keys. If you find any unprocessed audit keys, copy them from `CTL_AUDIT_LOG_BK` to the new `CTL_AUDIT_LOG` table.

  - Delete the `CTL_*_BK` tables when you are satisfied that you no longer need them for reference purposes or backup.

- Be aware that, during migration from release 8.1.3 or earlier:

  - Genesys Info Mart creates a new `STG_TRANSFORM_DISCARDS` table, renaming the existing table to `STG_TRANSFORM_DISCARDS_BK`.

  - During migration from release 8.1.3 or earlier to 8.1.401 or later (in deployments that include multimedia), Genesys Info Mart creates new `GIDB_G_IR_MM`, `GIDB_G_CALL_MM`, `GIDB_G_ROUTE_RESULT_MM`, `GIDB_G_VIRTUAL_QUEUE_MM`, `GIDB_G_PARTY_MM`, and `GIDB_G_PARTY_HISTORY_MM` tables, renaming the existing tables to `GIDB_G_*_MM_BK`. Genesys Info Mart populates the new `GIDB_G_*_MM` tables by copying over, from the existing tables, only active interaction data that has not yet been transformed. Genesys Info Mart retains the `*_BK` tables for reference. Delete them when you are satisfied that you no longer need them for reference purposes or backup. During migration from 8.1.3 or earlier to 8.1.400, the content of these tables was not preserved.
  Note: In partitioned Microsoft SQL Server deployments, when you migrate from a release earlier than 8.1.401 to release 8.1.401 or later, Genesys strongly recommends that you delete the `GIDB_G_*_MM_BK` tables as soon as possible. The `GIDB_G_*_MM_BK` tables that are created during such a migration might significantly slow down purge, causing the maintenance job to not complete within the configured maintenance window, resulting in job errors when the ETL cycle resumes.

10. If the Genesys Info Mart database is partitioned, launch `Job_MaintainGIM` from the Genesys Info Mart Manager. To do so, perform the following steps:

    a. Open the Genesys Info Mart Manager.

    b. Click `Run Job` to open the `Run Job` dialog box.

    c. Select `Job_MaintainGIM`.

    d. Click `OK`.

11. Set the `run-scheduler` configuration option to TRUE in the `[schedule]` section of the Genesys Info Mart `Application` object to resume the Genesys Info Mart Server schedule.

12. If you are using Genesys-provided aggregation, set the `run-aggregates` configuration option to TRUE in the `[schedule]` section of the Genesys Info Mart `Application` object, to resume running the aggregation job in automated mode.

Rollback Procedure

Restore:

- The Info Mart database from the backup copy.

- The IDB schema to its premigration state by running the applicable update script from the premigration release of Genesys Info Mart.

- The premigration Genesys Info Mart application.