Genesys Interactive Insights 8.0

Deployment Guide

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Preface

Welcome to the *Genesys Interactive Insights 8.0 Deployment Guide*. This document introduces you to the configuration, installation, setup, and start procedures that are relevant to the setup of Interactive Insights universes and the operation of Interactive Insights reports.

This document is valid only for the 8.0.*x* releases of the Genesys Interactive Insights (GI2) and Genesys Interactive Insights for iWD products.

`Note:` For versions of this document that have been created for other releases of these products, visit the Genesys Technical Support website, or request the Documentation Library DVD, which you can order by e-mail from Genesys Order Management at `orderman@genesyslab.com`.

This preface provides an overview of this document, identifies the primary audience, introduces document conventions, and lists related reference information. It includes the following sections:

- About Genesys Interactive Insights and Genesys Interactive Insights for iWD, page 7
- Intended Audience, page 8
- Chapter Summaries, page 9
- Making Comments on This Document, page 9
- Contacting Genesys Technical Support, page 10
- New in This Release, page 10

For information about related resources and about the conventions that are used in this document, see the supplementary material starting on page 89.

About Genesys Interactive Insights and Genesys Interactive Insights for iWD

Genesys Interactive Insights provides reports that summarize contact center activity and an entire universe, named `GI2_Universe`, of elements that support them. Genesys Interactive Insights for iWD is a different but similar Genesys product that provides a separate universe (`iwd_universe`) and a set of reports

that summarize the enterprise activity that is recorded within intelligent Workload Distribution Data Mart.

Both GI2 products were built from the same foundation; namely, BOEXI. As such, the instructions on how to deploy the universe and reports for each product—the subject of this document—are similar, if not the same, and have been consolidated into this document, the *Genesys Interactive Insights 8.0 Deployment Guide.*

To facilitate the consolidation, this document makes use of generic references to both products. The terms "Interactive Insights" and "GI2" when used with no other descriptive phrases apply equally to the Genesys Interactive Insights and Genesys Interactive Insights for iWD products. For example, the phrase *the primary focus of the Interactive Insights report design* describes the focus of report designs of both products. Nuances, then, that are specific to one product only are explicitly spelled out in documentation. In such cases, this document uses the following:

- Interactive Insights for Genesys Info Mart or (GI2 for GIM) or
- Interactive Insights for iWD (GI2 for iWD)

Note: This tagging is for documentation purposes only; note that the product name is not Interactive Insights for Genesys Info Mart but, instead, Genesys Interactive Insights.

Intended Audience

This document, which is intended primarily for system administrators, assumes that you have a basic understanding of:

- Computer-telephony integration (CTI) concepts, processes, terminology, and applications.
- Network design and operation.
- Your own network configurations.
- Contact-center functions and operations.
- The Genesys telephony models.
- The structure of and connectivity parameters for the Genesys Info Mart database and/or the intelligent Workload Distribution Data Mart.
- BusinessObjects Enterprise XI 3.1 software, which is the third-party tool from which the Interactive Insights reports and universe were built.

You should be familiar also with the installation, configuration, and use of BusinessObjects Enterprise XI 3.1 software.

Chapter Summaries

In addition to this preface, this document contains the following chapters:

- Chapter 1, "Interactive Insights Overview", beginning on page 13, sketches the interrelationships between the Genesys and Business Objects Enterprise (BOE) components on which Interactive Insights relies.
- Chapter 2, "Which BOE Components Must Be Installed?", beginning on page 19, describes the minimum subset of Business Objects Enterprise components that are needed for Interactive Insights operation.
- Chapter 3, "Installing Interactive Insights", beginning on page 29, lists the prerequisites for installation and describes the steps to deploy Interactive Insights on UNIX and Microsoft Windows platforms.
- Chapter 4, "Setting Up the Environment", beginning on page 47, points out the additional setup steps that are required to ready your environment including linking the universe to Data Mart, setting data access restrictions, and customizing measure definitions.
- Chapter 5, "Migrating Interactive Insights", beginning on page 69, discusses general topics of migration for the various components of Interactive Insights and, more specifically, how to organize your environment to maintain multiple universes of Interactive Insights and how to migrate your custom reports.
- Chapter 6, "Accessing Interactive Insights Components", beginning on page 77, describes how to invoke the InfoView, Web Intelligence, and Designer applications to access the Interactive Insights reports and universe. This chapter provides specific references to Business Objects documentation that describes how to use these applications.
- Chapter 7, "Uninstalling Interactive Insights", beginning on page 81, describes the wizard-driven and manual steps that are required to uninstall Interactive Insights.
- Chapter 8, "Application Files", beginning on page 85, describes the Interactive Insights files that are deployed during installation.

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You can comment on what you regard as specific errors or omissions, and on the accuracy, organization, subject matter, or completeness of this document. Please limit your comments to the scope of this document only and to the way in which the information is presented. Contact your Genesys Account Representative or Genesys Technical Support if you have suggestions about the product itself.

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Japan	+81-3-6361-8950	support@genesyslab.co.jp
Before you contact technical support, refer to the *Genesys Technical Support Guide* for complete contact information and procedures.		

New in This Release

This section lists topics that are new or that have changed significantly since the 7.6.2 release of this document.

GI2 for iWD

The installation routine for Genesys Interactive Insights for iWD is introduced in the 8.0.0 release.

GI2 for GIM

- Three new access levels group the permissions that apply to the Interactive Insights user groups (see page 56).

- Installation of the Reporting and Analytics Aggregates (RAA) 8.0 option of Genesys Info Mart is a new requirement for Interactive Insights 8.0. Different from the 7.6 releases, aggregate tables are no longer created, maintained, or populated as part of GIM's core functionality. Refer to the Reporting and Analytics Aggregates documentation set for information about this option.
- The installation routine now avails a third option for deploying Interactive Insights within your environment—to only extract files from the installation package (see page 30).
- The `make_gi2.sql` script is now deployed automatically to your environment as part of RAA installation.

Refer to the *Genesys Interactive Insights 8.0 Universe Guide* for information about new reports and supporting universe elements that were introduced with the 8.0 release. Also, refer to the *Genesys Interactive Insights 8.0 User's Guide* for a discussion of the upgrade utility introduced in the 8.0 release and for new examples on how to customize the universe and reports to meet business needs

Chapter

1 Interactive Insights Overview

Genesys Interactive Insights 8.0.*x* uses the data that is stored in a Genesys Info Mart (GIM) 8.0.*x* database or an intelligent Workload Distribution (iWD) 8.0.*x* Data Mart and presents the data in readable reports to enable business and contact-center managers to make better business decisions for streamlining operations, reducing costs, and providing better services.

This chapter provides an overview of the relationships between the components that are required for Interactive Insights 8.0.*x* operation.

The chapter includes the following sections:

- Presentation Layer for Genesys Info Mart and iWD Data Mart, page 13
- Genesys Info Mart 8.0, page 14
- intelligent Workload Distribution 8.0, page 15
- BusinessObjects Enterprise, page 16
- Deploying Interactive Insights, page 17

Presentation Layer for Genesys Info Mart and iWD Data Mart

Interactive Insights is the presentation layer that Genesys has designed for the business-like interpretation of source data that is collected and stored in Info Mart. Interactive Insights for Genesys Info Mart (GIM) provides a universe of over 300 defined agent-, queue-, business attribute–, outbound-, and interaction-type measures and over 30 reports that summarize agent session states and contact center activity. The universe that Genesys provides for Interactive Insights for intelligent Workload Distribution (iWD) supports nine reports that summarize task activity within the enterprise. This functionality is delivered with the power of BusinessObjects Enterprise (BOE) XI 3.1

software. Figure 1 illustrates how the components that contribute to Interactive Insights operation fit together.

Refer to the *Genesys Interactive Insights 8.0 Universe Guide* for indepth details about the Genesys-provided Interactive Insights 8.0 reports and measures.

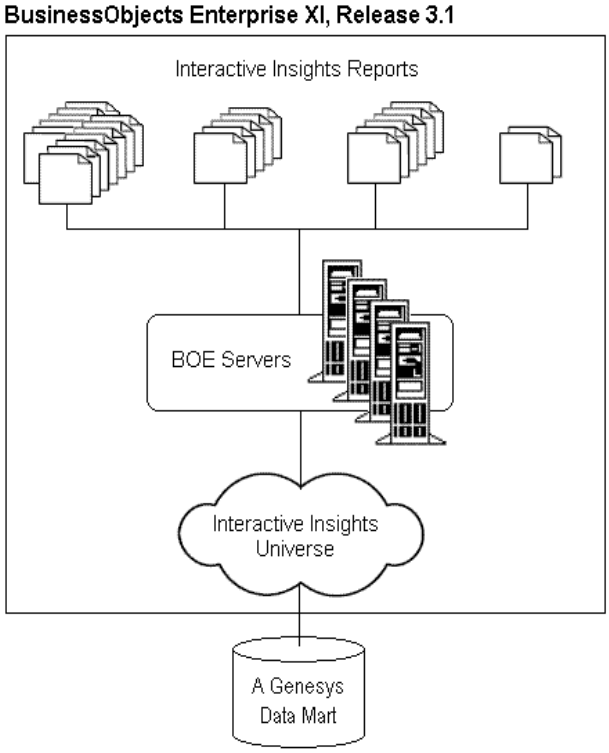


Figure 1: BOE Architecture Using Interactive Insights

Genesys Info Mart 8.0

Genesys Interactive Insights pulls data directly from the Genesys Info Mart (GIM) database. So, for pure operation, Interactive Insights requires that no other Genesys product be running in order for the Interactive Insights reports to be scheduled, maintained, opened, and run. Only the Info Mart's RDBMS and BusinessObjects Enterprise (BOE) XI 3.1 software must be in operation. From a practical standpoint, however, Info Mart should be populated regularly with meaningful data that is sourced from your contact-center activities that are directed, monitored, and recorded by a number of Genesys products.

The GIM Server extracts, transforms, and loads contact-center data into fact tables at the most atomic, interaction level—enabling maximum flexibility of data interpretation. This low level of detail is good for tracking, verifying, and determining the contributing grains. But such detail is rarely useful for reporting and analysis of the performance of various contact-center resources over a span of time, even as little as an hour.

The Reporting and Analytics Aggregates engine—an optional GIM component that is mandatory for Interactive Insights operation—compiles data from these fact tables and stores it within several aggregate tables, based on the appropriate aggregation level (subhour [i.e., 30-minute], hour, day, and month) and type of data (disposition or interval). Other aggregation levels are available as views. Use of these aggregates drastically improves query performance when you run the Interactive Insights reports.

Info Mart schema was updated significantly in the GIM 8.0.*x* releases to enable measurement of multimedia interactions among other features. The Interactive Insights 8.0 universe and reports reflect the changes and function only when they are paired with an Info Mart based that is on the GIM 8.0 schema. Refer to the "Interactive Insights Reports" chapter of the *Genesys Interactive Insights 8.0 Universe Guide* for a list of the underlying Info Mart source tables of each Interactive Insights report and either or both of:

- The *Genesys Info Mart 8.0 Reference Manual* for your particular RDBMS type, for in-depth descriptions of the fact and dimension Info Mart tables and their columns.
- The *Reporting and Analytics Aggregates 8.0 Reference Manual*, for indepth descriptions of aggregation tables and their columns.

The 8.0.1 release of Genesys Interactive Insights supports the generation of reports from GIM data sources that are managed by the following RDBMSs:

- Oracle 10g and 11g.
- Oracle RAC 10g.
- Microsoft SQL Server 2005 and 2008.

Refer to the *Genesys Supported Operating Environment Reference Manual* for additional information about support and the *Genesys Interoperability Guide* for the minimum required releases of the necessary components.

intelligent Workload Distribution 8.0

Genesys Interactive Insights for iWD pulls data directly from iWD Data Mart which is populated by intelligent Workload Distribution 8.0. As with GI2 for GIM, GI2 for iWD requires the operation of no other Genesys product for pure operation.

iWD Data Mart schema must be of release 8.0.002.08 or higher. This 8.0 maintenance release includes database modifications that accommodate the initial release of Genesys Interactive Insights for iWD.

This release of Genesys Interactive Insights for iWD supports the generation of reports from iWD data sources that are managed by the following RDBMSs:

- Oracle 10g R2, 10g RAC, 11g, 11g RAC
- Microsoft SQL Server 2005 and SQL Server 2008
- MySQL 5.0.41+

Refer to the *Genesys Supported Operating Environment Reference Manual* for additional information about support and the *Genesys Interoperability Guide* for the minimum required releases of the necessary components.

BusinessObjects Enterprise

BusinessObjects Enterprise XI 3.1 is the business intelligence software that Genesys has selected to power Interactive Insights 8.0. The tools that are furnished with this software suite enable you easily and quickly to produce meaningful results, and provide analysis for more effective decision making.

A full BOE XI 3.1 installation contains all of the components shown in Figure 2. Many of these components, however, are not used for Interactive Insights operation. Figure 3 shows the minimum BOE XI 3.1 components that are required to use the Interactive Insights universe and generate Interactive Insights reports.

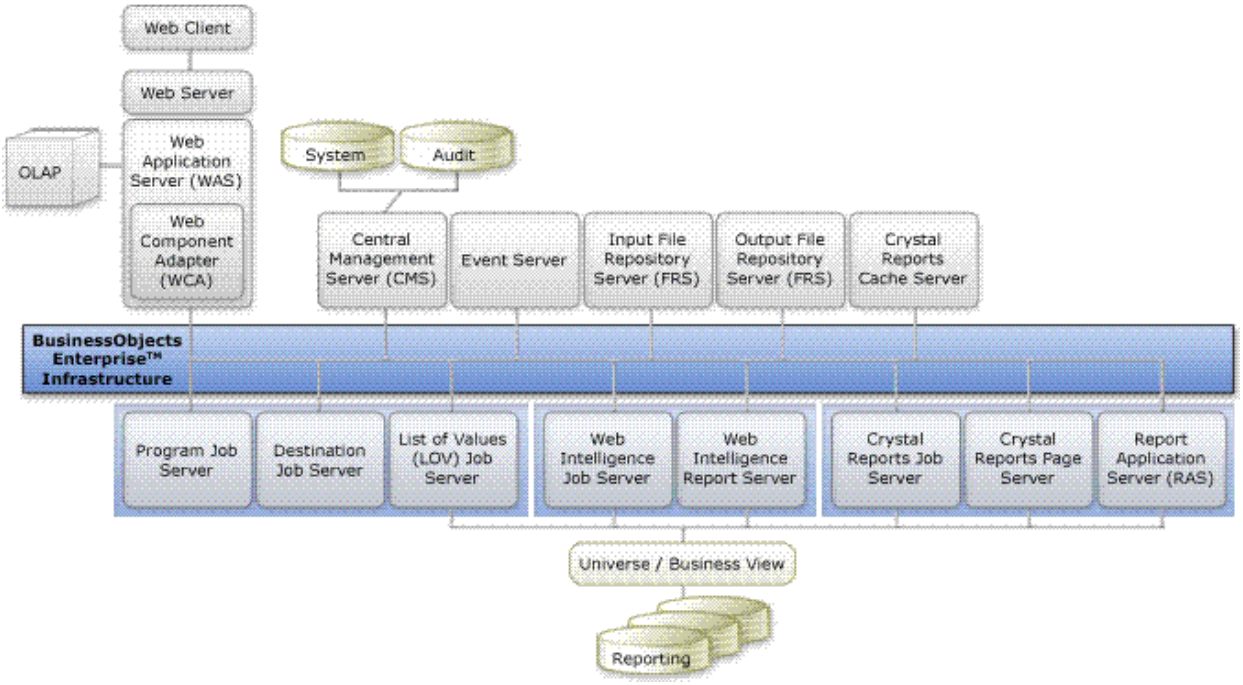


Figure 2: BusinessObjects Enterprise XI 3.1 Architecture

Refer to the BOE XI 3.1 documentation set for a complete description of these components.

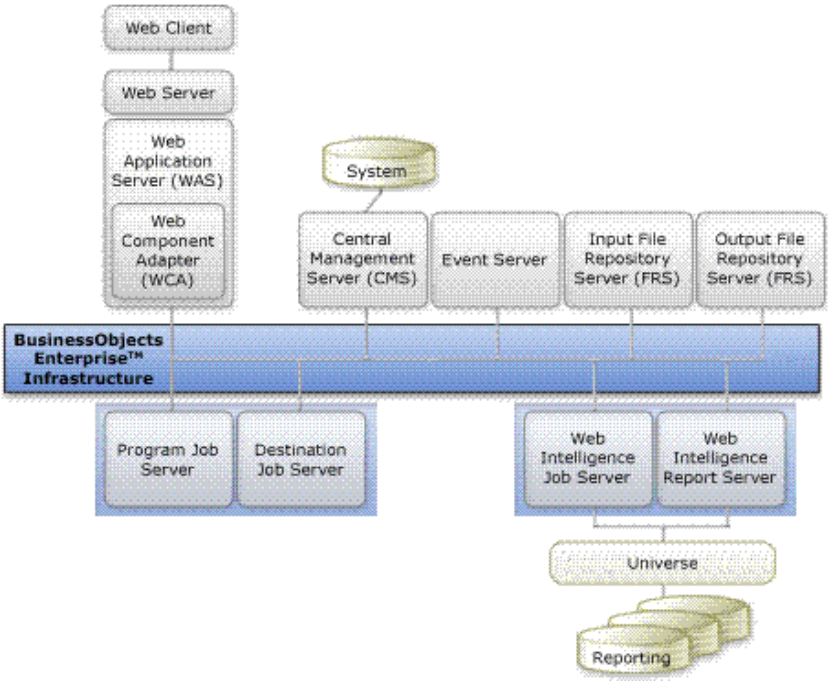
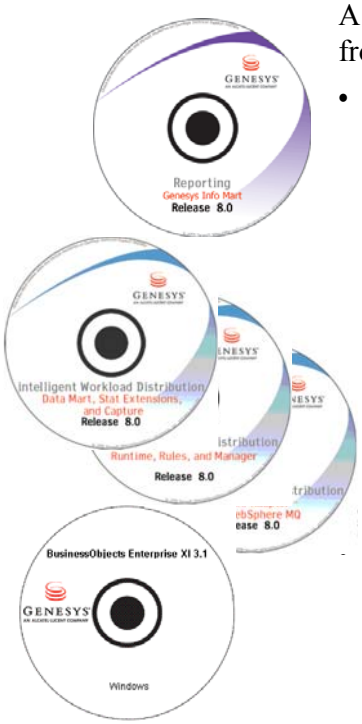


Figure 3: Minimum BOE Components for Interactive Insights Operation

Deploying Interactive Insights



Genesys has positioned Interactive Insights as options to Genesys Info Mart 8.0 and intelligent Workload Distribution 8.0. To use Interactive Insights for either product, you must perform, at minimum, two independent installations. A third independent installation is required if you choose to install BOE apart from the installation of Interactive Insights:

- A Genesys Data Mart—either of the following:
  - Genesys Info Mart 8.0—You must have the Genesys Info Mart 8.0 CD (or image) to install Info Mart 8.0. Please refer to the *Genesys Info Mart 8.0 Deployment Guide* for instructions on installing this product; "Readying GIM for Aggregation" on page 47 of this document, for additional setup information; and the GI2 release advisory for the minimum required version of GIM 8.0 software.
  - intelligent Workload Distribution 8.0—You must have the iWD 8.0 product CDs (or images) to install iWD 8.0. Please refer to the *intelligent Workload Distribution 8.0 Deployment Guide* for instructions on installing this product and the GI2 release advisory for the minimum required version of iWD 8.0 software.

BusinessObjects Enterprise XI 3.1—Refer to BusinessObjects Enterprise XI 3.1 documentation for instructions on manually installing Business Objects software. Both silent and manual installations require the BusinessObjects Enterprise XI 3.1 DVD (or image).

- Interactive Insights 8.0—
  - You must have the Genesys Interactive Insights 8.0 CD (or image) to install the universe and reports for reporting on data in Genesys Info Mart.
  - You must have the Genesys Interactive Insights for iWD 8.0 CD (or image) to install the Genesys Interactive Insights for iWD 8.0 universe and reports.

  Both installation routines include commands to install BOE XI 3.1 silently, at your election. Refer to Chapter 3, “Installing Interactive Insights,” on page 29 of this document, for deployment instructions and Chapter 4, “Setting Up the Environment,” on page 47 for post-GI2 setup.

  This IP also includes Reporting and Analytics Aggregates 8.0, which is an optional GIM component that is mandatory for Interactive Insights operation. A GI2 installation automatically and silently deploys RAA. RAA should not be installed independently prior GI2 installation. Refer to the Reporting and Analytics Aggregates documentation set for information about this Genesys Info Mart option.

Unlike many other Genesys products, the Interactive Insights application is not configured in Configuration Server.

Chapter

2 Which BOE Components Must Be Installed?

The *BusinessObjects Enterprise XI 3.1 Installation Guide* describes how to deploy the suite of tools that is provided with this software. Separate guides are provided for installation on both UNIX and Windows platforms. BOE documentation is available on the Genesys-provided BOE documentation DVD and at `http://help.sap.com` on the `Business Objects` tab (for direct Business Objects customers). Please consult either resource for installing the software. The full set of documentation is available to customers who obtained BOE software through Genesys from the following URL:

```
http://service.sap.com/sap/bc/bsp/spn/oem_portal/infouser_
request.htm?pid=0000279980&code=574DA18E763BA5920D1769FC17946653
&dstamp=20090604
```

Only a subset of BOE XI 3.1 components, however, is needed for full Interactive Insights operation. The required components are predefined for you when you select to install BOE, silently, as part of the Interactive Insights installation. Some other components of the BOE XI 3.1 suite, which are not required for Interactive Insights installation, are not deployed when Business Objects is installed in concert with Interactive Insights. For the instructions on installing Business Objects in this manner, refer to Chapter 3, "Installing Interactive Insights".

If you choose to install BOE independent of an Interactive Insights installation, you might be interested in knowing which components bare no impact on Interactive Insights operation. This information is provided in this chapter, which describes the BOE XI 3.1 components that *must* be installed. This chapter includes the following sections:

- Prerequisites, page 20
- Required BOE XI 3.1 Components, page 22
- Installing BOE XI 3.1 Prior to Installing Interactive Insights, page 25
- BOE XI 3.1 Service/Fix Packs and Hot Fixes, page 26
- Setting Up the BOE XI 3.1 Environment, page 26

Note: BusinessObjects Enterprise XI 3.1 must be installed prior to, or in concert with, Interactive Insights.

Prerequisites

To successfully install BusinessObjects Enterprise XI 3.1, the following prerequisites must be met:

- You must have the BOE XI 3.1 installation package, which is provided either directly from Business Objects or from Genesys. Furthermore, BOE cannot already pre-exist on your host. If you have a prior version of BOE installed, you should upgrade it to 3.1 rather than install the new version. Refer to the *BusinessObjects Enterprise Upgrade Guide* for instructions.
- Your operating system version must comply with a supported version.

  Supported platforms are provided in BOE documentation.

  Note: Business Objects supports a wider range of platforms than does Genesys. This release of Interactive Insights restricts platform support to those that currently are supported by Genesys Info Mart 8.0 or intelligent Workload Distribution 8.0. Please refer to the *Genesys Supported Operating Environment Reference Manual* for this information.

- Your environment meets or surpasses the minimum hardware requirements described in BOE XI 3.1 documentation (for example, 2 GB RAM, and up to 7 GB hard-disk space) for the various BOE servers.
- Your environment meets or surpasses the minimum software requirements for the various server products described in BOE XI 3.1 documentation.

  Note: Business Objects supports connectivity to a wider range of RDBMSs than does Genesys. This release of Interactive Insights restricts RDBMS support to those that currently are supported by Genesys Info Mart 8.0 or intelligent Workload Distribution 8.0. This information is available in the *Genesys Supported Operating Environment Reference Manual.*

UNIX Notes

In addition, for UNIX platforms:

- You cannot be logged on as the `root` user to install BOE XI 3.1.
- The `LOCALE` setting of the UNIX shell must be set to Unicode encoding:
  - `en_US.UTF-8` (for Solaris)
  - `en_US.utf8` (for Linux)

The installation routine might vary slightly on different UNIX platforms and can take upward of an hour to complete on any platform.

Obtaining Access Parameters

Remember the access parameters that you specify when setting up the Central Management Server (CMS) during BOE installation. Later, when you install Interactive Insights, you will need the BOE administrator's user name and password, as well as the host and port information, if the default values were not chosen. The defaults are:

- User name: `Administrator` (This user must be named `Administrator`. Another user account with administrative permissions will not suffice.)
- Password: <*blank*>
- Host: Name of your computer
- Port: `6400`

Genesys recommends that you specify a nonblank password. (The silent installation of BOE XI 3.1, however on UNIX platforms, requires that this password be null.) You can retrieve the port number from the Central Configuration Manager, as follows:

1. Open the Central Configuration Manager, and right-click the `Server Intelligence Agent` application.
2. Select `Properties` from the context menu that appears, and then select the `Startup` tab.

The CMS port number appears in the `Local CMS Servers` frame, as shown in Figure 4.

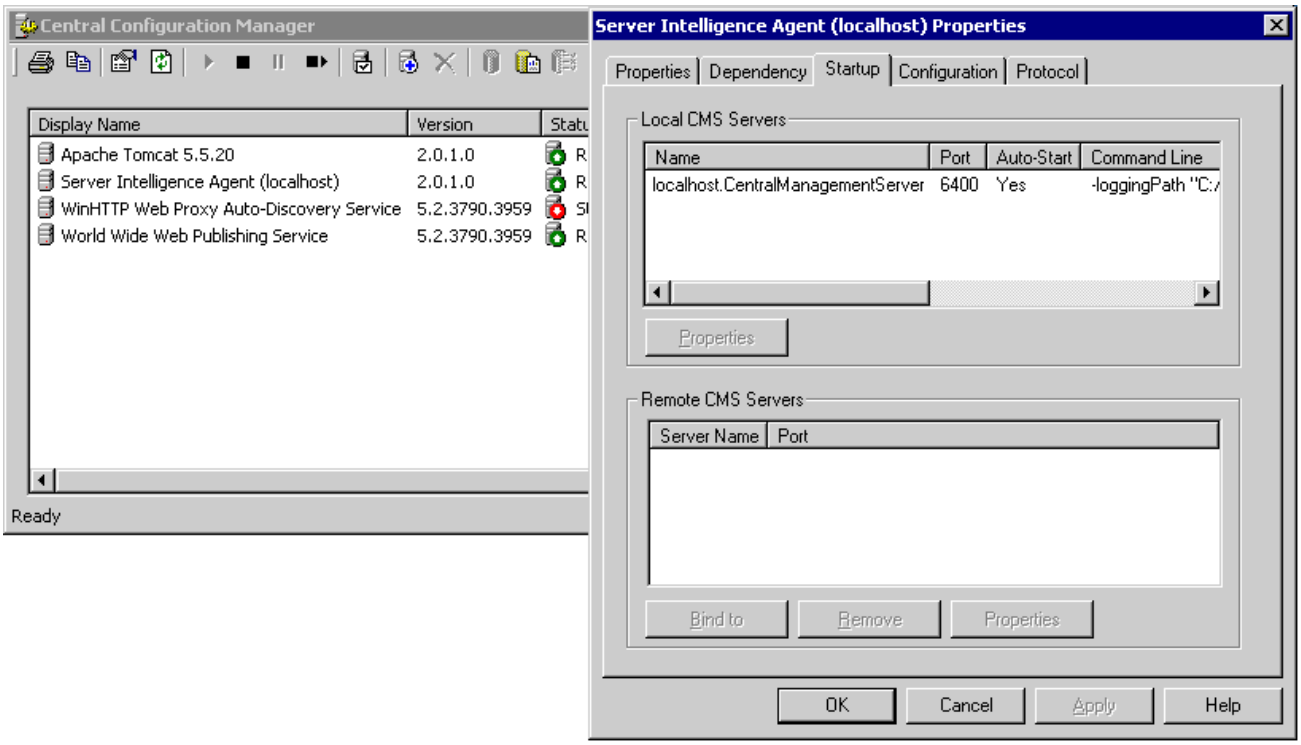


Figure 4: Obtaining the CMS Port

Note: The Business Objects license that Genesys provides is a restricted license. Refer to the licensing agreement for details on what data you can access when using this software.

Required BOE XI 3.1 Components

This section lists the BOE components that you must install for Interactive Insights operation.

A Full BOE Deployment

A full deployment of BusinessObjects Enterprise XI 3.1 software installs the following components:

Client Components

- Data Source Migration Wizard
- Business View Manager
- Report Conversion Tool
- Import Wizard
- Universe Designer
- Desktop Intelligence
- Web Intelligence Rich Client
- Developer Components
  - BOE Java SDK*
  - BOE Web Services*
  - BOE .Net SDK
- Publishing Wizard
- Query as a Web Service
- Translation Manager

* With the exception of the noted components, all client components are available only on Windows platforms.

Server Components

The listing of server components might vary slightly on the Linux platforms.

- Enterprise Servers
  - Central Management Server
  - Event Server
  - Input File Repository Server
  - Output File Repository Server
  - Crystal Reports Cache Server
  - Crystal Reports Processing Server
  - Publication Job Server
  - Report Application Server
  - Multi Dimensional Analysis Services Server
  - Crystal Reports Job Server
  - Destination Job Server
  - List of Values Job Server
  - Desktop Intelligence Job Server
  - Program Job Server
  - Adaptive Job Server
  - Adaptive Processing Server
  - Web Intelligence Processing Server (otherwise known as Web Intelligence Report Server)
  - Web Application Container Server (Windows only)
  - Desktop Intelligence Servers
  - Dashboard and Analytics Servers
  - Auditing Reports and Universes

- Central Configuration Manager (Windows only)
- Mapping Support (Windows only)

Web Tier Components

- BI Platform Web Components
- BOE Web Services
- Tomcat

In addition, a full deployment enables access to the following RDBMS types and the export of results to the following formats:

Database Access

- Data Federator
- HP Neoview
- MySQL
- GenericODBC
- Salesforce.com Driver
- NETEZZA
- Microsoft (Windows only)
- IBM DB2
- IBM Informix (includes Red Brick)
- Progress OpenEdge
- Oracle
- Sybase
- NCR Teradata

Export Support

- Character Separated Format
- Disk File Destination
- Rich Text Format
- Word for Windows Format
- Acrobat PDF Format
- Text Format
- Excel Format
- Crystal Reports Format
- XML Export
- Legacy XML Export

The Required Set of BOE Components

Not all of the aforementioned client and server components interoperate with Interactive Insights. If you are manually installing Business Objects, when prompted at the `Select Features` page of the BOE XI 3.1 Setup Wizard, (shown in Figure 5), select, at minimum, the following components to install:

Client Components

- Import Wizard
- Universe Designer
- Web Intelligence Rich Client
- Developer Components
  - BOE Java SDK*
  - BOE Web Services*
  - BOE .Net SDK

* With the exception of the noted components, all client components are available only on Windows platforms.

Web Tier Components For Web tier components, select any of the provided choices.

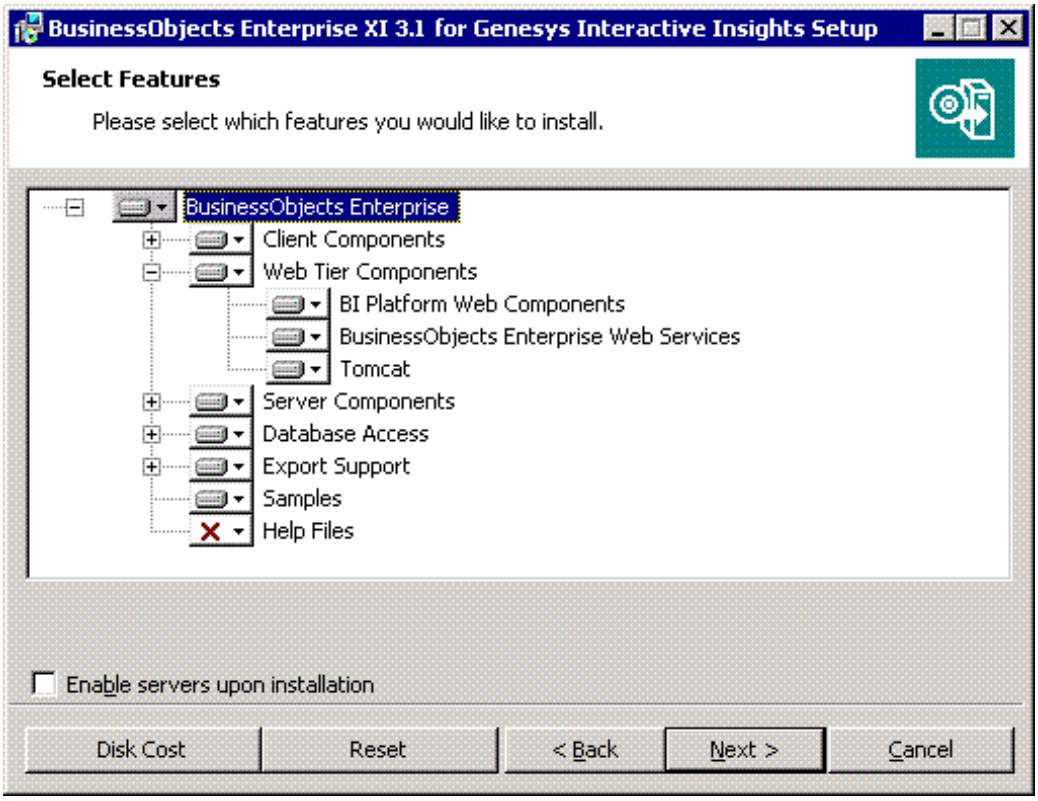


Figure 5: Select BOE Features

Server Components

- Central Configuration Manager (Windows only)
- Central Management Server
- Event Server
- Report Application Server
- Input File Repository Server
- Output File Repository Server
- Web Intelligence Processing Server
- Job Servers
  - Publication
  - Destination
  - List of Values
  - Program
  - Adaptive
- Adaptive Processing Server
- Dashboard and Analytics Servers
- Auditing Reports and Universes

Database Access

For database access, Interactive Insights supports connectivity to only those RDBMSs that currently are supported in the Genesys Info Mart 8.0.*x* or intelligent Workload Distribution 8.0.*x* releases—namely, the following:

GI2 for GIM	GI2 for iWD
• Microsoft SQL Server	• Microsoft SQL Server
• Oracle	• Oracle
	• MySQL

Refer to the *Genesys Supported Operating Environment Reference Manual* for the specific supported version.

In addition to one (or more) of these RDBMSs, select, at minimum:

- MySQL, as this RDBMS is used for communication with the Central Management Server (CMS) database.
- Generic ODBC, which is used also by CMS.

Export Support

If you intend to export report results, select any or all of the appropriate output formats that are provided at the `Select Features` page.

Installing BOE XI 3.1 Prior to Installing Interactive Insights

Provided among the software that is bundled with Genesys Interactive Insights is a complete version of BusinessObjects Enterprise XI 3.1. Instructions for installing the complete version of this software are provided in Business Objects documentation—specifically, within the following documents, as appropriate:

- *BusinessObjects Enterprise XI 3.1 Installation Guide for Windows*
- *BusinessObjects Enterprise XI 3.1 Installation Guide for UNIX*
- *BusinessObjects Enterprise 5/6 to XI 3.1 Migration Guide*
- *BusinessObjects Enterprise Upgrade Guide*

Indeed, you must install the complete version if you want more functionality than that which is provided by Genesys' standard configuration of Business Objects for Interactive Insights, which specifies the following:

- English language
- Tomcat application server
- MySQL, as the DBMS for the Central Management Server (CMS)
- `Administrator`, as the name of the CMS administrative user

In addition, to use other tools of the BOE XI 3.1 suite that Interactive Insights neither uses nor installs (such as Crystal Reports), you must install BOE independent from Interactive Insights. Keep in mind, though, that deployment of the full version of Business Objects still binds you to the limited licensing

agreement regarding its use, which is described under "Licensing Restrictions" in the *Genesys Interactive Insights 8.0 User's Guide.*

However, Genesys provides the opportunity to install Business Objects silently via the Interactive Insights installation routine, which is described beginning on page 29. The silent installation deploys fewer components of the BusinessObjects Enterprise XI 3.1 suite. This might be more desirable to preserve system resources and hard disk space.

BOE XI 3.1 Service/Fix Packs and Hot Fixes

To appreciate fully the functionality that Interactive Insights software provides, Genesys requires that you install the latest service and fix packs for Business Objects software *that have been validated by Genesys Quality Assurance*. If you are a direct Business Objects customer—that is, if you purchased Business Objects software directly from SAP—other, more recent service or fix packs might be available to you, in addition to those that come bundled with Interactive Insights. Please note that Interactive Insights software might respond differently from what you might expect when used in conjunction with service and fix packs that are not tested by Genesys. Please refer to Table 3 on page 70 to learn about the BOE software that is recommended for operation with Interactive Insights 8.0.

In addition to BOE-provided packs, Genesys might provide hot fixes to Business Objects software that are not available to the general BOE public. Refer to the release notes for *Genesys Interactive Insights Platform Components Fix Pack 8.0.x* for information about the content of these hot fixes.

Setting Up the BOE XI 3.1 Environment

Refer to the *BusinessObjects Enterprise XI 3.1 Administrator's Guide* to set up the administrative functions for using Business Objects software including:

- Setting rights.
- Managing user accounts and groups.
- Managing data sources and connections.
- Managing objects.
- Scheduling objects.
- Managing profiles.
- Row-level and column-level security.

The reports and universe that are deployed later during Interactive Insights installation are initially available only to the following users:

- `Administrator`
- `Developer`
- `Editor`
- `Viewer`

Other users, their roles, and access to the reports and to the universe are set up in accordance with your company's policy. For multi-tenant environments, consider creating separate groups (at minimum) for each tenant, so as to align with the manner in which universe connections to the Genesys Info Mart or iWD Data Mart should be defined.

Refer to page 55 for information about the Interactive Insights groups and users that are provided in the `insights.biar` file.

`Note:` Preferences and permissions for BOE XI 3.1 components that are not required for Interactive Insights operations—such as Crystal Reports and Xcelsius—may be disregarded.

Chapter

3 Installing Interactive Insights

If you manually installed BusinessObjects Enterprise (BOE) XI 3.1 prior to installing Interactive Insights, follow the instructions that are provided in this chapter to install Interactive Insights. At your option, however, you can also install BOE silently, during the installation of Interactive Insights. This chapter describes also this deployment scenario. In addition, Interactive Insights requires connection to either an 8.0 Info Mart or 8.0 iWD Data Mart. These databases, although not required for Interactive Insights installation, should be regularly populated by a Genesys Info Mart (GIM) 8.0 application or intelligent Workload Distribution (iWD) 8.0 application. Either GIM 8.0 or iWD 8.0 should be installed before you run the Interactive Insights reports.

This chapter contains the following sections:

- Overview of the Installation Routine, page 30
- Prerequisites, page 31
- Backing Up Prior Universes, page 32
- Installing Interactive Insights on UNIX, page 32
- Installing Interactive Insights on Windows, page 35
- Manually Running the Interactive Insights Installation Script, page 37
- Manually Importing the GI2 Reports, Universe, Users, Groups, and Rights, page 38
- Viewing the Interactive Insights Reports and Universe, page 42

After you have installed Interactive Insights, perform the additional steps that are described in Chapter 4, “Setting Up the Environment,” on page 47 to ready the universe for report users.

Overview of the Installation Routine

Beginning with the Interactive Insights 8.0 release, in lieu of automatically deploying Interactive Insights to your environment and within the BOE repository, when invoked, the installation routine offers you the option to copy the installation script and supporting files to a designated location for manual deployment at a later date/time. This option provides you with more control and visibility into the inner workings of the installation routine.

In addition to copying the installation script and supporting files (including the BOE installation package, if you indicate to install BOE software), the routine's deploy-now option:

- Copies (to the GI2 root folder) the `make_gi2` SQL script that:
  - Reporting Analytics and Aggregates automatically runs upon first start (for GI2 for GIM).
  - You must manually run against the iWD Data Mart (for GI2 for iWD).

  This script sets up the views that are needed to run the Interactive Insights reports.
- Imports the Interactive Insights universe, folder, reports, connection, measure maps, and PDF documents into the Business Objects repository.
- Defines different users and groups within BOE.
- Updates the program registry on Microsoft Windows platforms.

These same actions are performed when you have manually installed Interactive Insights after having chosen the copy-only option.

If, for any reason, the installation exits without successfully installing Interactive Insights or without importing the Interactive Insights universe, folder, or reports, you can review the contents of the `deploy_unv_rep.log` file (which will be located in the Interactive Insights root directory), correct the error, and rerun the deployed installation script. Refer to Chapter 8, "Application Files," on page 85 for the names of the application files that are deployed. This file is only produced only if BOE software has been installed.

`Note:` Unlike most other Genesys applications, Interactive Insights is neither configured as an application in the Genesys Configuration Manager nor started (nor stopped) by using the Genesys Solution Control Interface.

Prerequisites

To install Interactive Insights, the following prerequisites must be met:

- BOE XI 3.1 software must be installed on the same host where GI2 will be installed—whether manually (prior to Interactive Insights installation) or silently (during Interactive Insights installation). Refer to Chapter 2, "Which BOE Components Must Be Installed?," on page 19 for additional information.
- You must connect to the BusinessObjects Central Management Server (CMS) as `Administrator` and the BOE servers must be running.

  Tip: If you installed BOE prior to installing Interactive Insights, consider running the BusinessObjects Diagnostic Tool and addressing any issues encountered.

- You must have the Interactive Insights 8.0 installation package (and the BOE installation package for deployment of both applications).

Your operating-system version must comply with a version that is supported by both GIM 8.0 and BOE XI 3.1 or by both iWD 8.0 and BOE XI 3.1—for example:

GI2 for GIM

- Sun SPARC
  - Solaris 9, 32- and 64-bit
  - Solaris 10, 64-bit
- Red Hat
  - Linux 4.0, 32-bit
  - Linux 5.0, 64-bit
- HP-UX, 11i v2 (64-bit)
- Microsoft
  - Windows Server 2003 (32-bit), with or without SP1
  - Windows Server 2008, 32- and 64-bit
- IBM, 32- and 64-bit
  - AIX/Power PC 5.2
  - AIX/Power PC 5.3

GI2 for iWD

- Sun SPARC
  - Solaris 10, 64-bit
- Red Hat, 32-bit
  - Linux 5.0
- Microsoft
  - Windows Server 2003 (32-bit), with or without SP1
  - Windows Server 2008, 32- and 64-bit
- IBM, 32- and 64-bit
  - AIX/Power PC 6.1

Note: Business Objects may support other versions of these platforms and other platforms altogether. This release of Interactive Insights, however, restricts support of operating system to only those platforms that are supported by either GIM 8.0 or iWD 8.0.

In addition, before you operate the Interactive Insights reports, you must have access to an Info Mart schema that is populated by GIM 8.0 or an iWD schema that is populated by iWD 8.0.002+. Refer to the *Genesys Info Mart 8.0 Deployment Guide*, the *intelligent Workload Distribution 8.0 Deployment Guide*, or the *Genesys Migration Guide* for information that pertains to configuring, installing, and/or upgrading these products. Although the installation routine does not check for this, the BOE license that Genesys provides requires such access for use of the software.

Backing Up Prior Universes

To preserve the customizations that you might have made to a preexisting Interactive Insights universe, Genesys recommends, as a precaution, that you back up any Interactive Insights universes that might exist in the Business Objects repository before you install Interactive Insights anew; the installation routine *might* overwrite a preexisting `GI2_Universe` or `iWD_universe`, regardless of the folder in which it resides. One way to accomplish this is to export the universe to a BIAR (Business Intelligence Archive Repository) file and store it for safekeeping. Refer to Business Objects documentation for instructions on how to export the universe to this format.

Installing Interactive Insights on UNIX

1. In the directory into which you copied the Interactive Insights installation package (or from the Genesys Interactive Insights 8.0 DVD), locate the `install.sh` shell script.
2. Run this script from the command line by typing: `sh install.sh`
3. When you are prompted to do so, indicate whether to copy only the Interactive Insights installation files: `y` or `n`.

   If you select `y`, the installation routine copies the files that are needed to install Interactive Insights manually to the current directory. You will have to manually deploy the Interactive Insights universe and reports to the BOE repository and set up groups and user permissions.

   If you select `n`, proceed to Step 4.
4. When you are prompted to do so, indicate whether to deploy Interactive Insights: `y` or `n`.

   If you selected `y` at Step 3, select `n` at this step.
5. When prompted, indicate whether to install BusinessObjects Enterprise XI 3.1 software: `y` or `n`.

If you selected `y` at Step 3, select `n` at this step.

> **Note:** Business Objects software must be installed so that the Interactive Insights universe, folder, and reports can be deployed to the Business Objects repository. If you do not install Business Objects at this point, you must have the location of BOE software at hand in order to proceed past Step 8.

6. If you selected to install BOE at Step 4, type the full path of the BOE installation files; otherwise, skip to Step 8. This path cannot contain spaces.

   The installation routine verifies the path's existence before you proceed to the next step.

7. Type the provided license key for Business Objects software, including the dashes.

> **Notes:** This keycode is:
> - Case insensitive
> - Not dependent on the operating system platform
> - Specific to Genesys-provided BOE software
>
> In addition, the BOEXI 3.0 keycode will work for Genesys-provided BOEXI 3.1 software.

8. Type the destination directory of the Business Objects installation. This path cannot contain spaces. Skip to Step 11 if you responded `n` at Step 4.

   This path represents the directory where the installation routine will install the application (if you selected to install Business Objects at Step 4) or the existing directory where the application has already been installed.

9. Type the CMS port, or accept the default (`6400`). Skip to Step 16 if you responded `n` at Step 4.

10. When prompted, do not specify a password for `Administrator`. Leave the password null. After successful installation, you can set a secure password.

11. Specify the host for the BOE CMS, or accept the default, which is the name of the local computer.

    The host name you specify cannot contain dashes (–) or periods (.). Go back to Step 9, if you responded `n` at Step 4.

12. Type the port for the BOE Intelligence Agent, or accept the default (`6410`).

13. Type a name for the CMS database, or accept the default (`BOE120`).

> **Note:** This installation presumes MySQL as the DBMS type for CMS. Business Objects, however, accepts other types for this database when the software is deployed apart from Interactive Insights.

14. Type a name for the CMS auditing database, or accept the default (`BOE120_AUDIT`).
15. Type the port for the CMS database, or accept the default (`3306`).
16. Type the password of the CMS database administrator. Skip to Step 23, if you responded `n` at Step 4.
17. Type the user name for a CMS database nonadministrative user, or accept the default (`sa`). This user represents the CMS database owner.
18. Type the password of the CMS database user from Step 17.
19. Type the connection port for the Tomcat application server, or accept the default (`8080`).

    `Note:` This installation presumes the Tomcat application server as the server that ties your data mart to Business Objects. Business Objects, however, accepts other application servers when the software is deployed apart from Interactive Insights.

20. Type the redirect port for Tomcat, or accept the default (`8443`).
21. Type the shutdown port for Tomcat, or accept the default (`8005`).
22. Type the BOE installation type: `1` for user, `2` for system. The system installation type enables the BOE servers to start and stop automatically when the UNIX server is brought up or shut down.
23. Type the full path of the destination directory for Interactive Insights installation files. This path cannot contain spaces.

    The installation routine verifies that a valid path was entered, extracts the Business Objects and/or Interactive Insights archives using the destination directories that were specified in Steps 6 and 23, and loads the Interactive Insights reports and universe into the Business Objects repository.

    If the installation routine fails to connect, the installation halts. You will have to resume the installation manually as described on page 37.

    Finally, the installation routine generates a log file, `deploy_unv_rep.log` and exits.

See Chapter 8, “Application Files,” on page 85 for a description of the files that are deployed. After successful installation, Genesys recommends that you edit the `gi2_setenv.sh` file to remove the password, if you are concerned about security.

Installing Interactive Insights on Windows

1. From the Genesys Interactive Insights 8.0 CD, the Genesys Interactive Insights for iWD 8.0 CD, or image of either, double-click the `setup.exe` file.

   The installation routine checks the Windows registry for an existing Interactive Insights installation before it displays the `Welcome` page.

   Note: GI2 for iWD can coexist with GI2 for GIM on the same host.

2. At the `Welcome` page, click `Next`.
3. At the `Installation Mode` page, choose one of the following options:
   - `Deploy Genesys Interactive Insights` or
     `Deploy Genesys Interactive Insights for iWD`
   - `Copy Genesys Interactive Insights files only` or
     `Copy Genesys Interactive Insights for iWD files only`

   Then, click `Next`.

   If you selected only to copy installation files, skip to Step 11.
4. At the `Select Options` page, choose one or more of the following options:
   - Install Business Objects Enterprise (BOE) XI
   - Install Interactive Insights or
     Install Interactive Insights for iWD

   Then, click `Next`.

   Note: The installation routine forces selection of the `Install Business Objects` option, if you select to deploy Interactive Insights and if it detects no such installation on the local host.

   If Business Objects is already installed on your host and you select only to install Interactive Insights, skip to Step 6.

   If you selected to copy Interactive Insights files, the installation routine copies the files to the current folder and exits.
5. At the `BusinessObjects Enterprise Product Key` page, enter the product keycode, and click `Next`. This keycode is case-insensitive and includes dashes.
6. At the `BusinessObjects Enterprise Central Management Server` page, enter the password of the CMS `Administrator`, and click `Next`.

   The installation routine prepopulates default values in the `Host name` and `Port` fields. Change these values, if desired.

   Skip to Step 11 if you selected only to install Interactive Insights at Step 4.

7. At the `BusinessObjects Enterprise Central Management Database Server` page, enter connectivity parameters for the following fields, or accept the defaults, and click `Next`:
   - Database name (default: `BOE120`)
   - Auditing Database name (`BOE120_AUDIT`)
   - Database Port (`3306`)
   - Administrator password
   - User name (`sa`)
   - User password

   Note: The Administrator password need not be blank as is required for UNIX installation.

8. At the `Business Objects Enterprise Configuration Parameters` page, enter the following server parameters for the BOE Intelligence Agent and for Tomcat, or accept the defaults, and click `Next`:
   - SIA `Node name` (default: *name of local host*)—The host name that you specify cannot contain dashes (–) or periods (.). SIA is the Server Intelligence Agent that manages BOE services and servers.
   - SIA `Port` (`6410`)
   - Tomcat `HTTP Connection Port` (`8080`)
   - Tomcat `Redirect Port` (`8443`)
   - Tomcat `Shutdown Port` (`8005`)
9. At the `Choose BusinessObjects Enterprise (BOE) XI Location` page, enter the full path for the BOE installation, and click `Next`.
10. At the `Choose BusinessObjects Enterprise (BOE) XI Installation Program Location` page, enter the folder where the BOE installation files exist, and click `Next`.
11. At the `Choose Destination Location` page, specify where the installation routine is to install the Interactive Insights, or accept the default location, and click `Next`. The default location is:

    `C:\Program Files\GCTI\Genesys Interactive Insights` (for GI2 for GIM)

    `C:\Program Files\GCTI\Genesys Interactive Insights for iWD` (for GI2 for iWD)
12. At the `Ready to Install` page, click `Install`.

    The installation routine extracts the Business Objects and/or Interactive Insights archives by using the destination directories that were specified in Steps 9 and 11; adds keys to the registry; loads the Interactive Insights reports, universe, users, groups, and rights; scans the BOE repository for existing components; generates a log file that reports its results; and then exits.

    Note: This step could take upward of an hour to complete if you selected to install Business Objects at Step 3.

13. Check the `deploy_unv_rep.log` file for indication of a successful Interactive Insights installation. The last line of the file should indicate the scan results of the BOE repository:

    ```
    Test finished, no errors found.
    ```

    If the results of the scan yield an error, the line reads as follows:

    ```
    Test finished. There are errors, see log above.
    ```

    If the installation routine fails to deploy Business Objects or fails to connect to CMS, the routine halts and logs appropriate messages. You will have to resume the installation manually as described below.

See Chapter 8, "Application Files," on page 85, for a description of the files that are deployed. After successful installation, Genesys recommends that you edit the `gi2_setenv.bat` file to remove the password, if you are concerned about security.

Manually Running the Interactive Insights Installation Script

You can use the files that are deployed by the installation routine to import the Interactive Insights universe, folder, reports, users, groups, and rights. Manually running the installation might be necessary if you:

- Want to deploy the universe and reports to a different BOE XI 3.1 environment.
- Selected the copy-files-only option from the Genesys Installation Wizard.
- Want to reimport the universe, folder, and/or reports to your environment.

  `Note:` Before reimportation, be sure to delete the Interactive Insights universe, folder, connection, user groups, and default users (that is, perform Step 3 on page 82).

- The installation of Interactive Insights was unsuccessful via the Genesys Installation Wizard. If so:
  a. Verify that the prerequisites, which are listed on page 31, are met.
  b. Locate the error in the log file (`deploy_unv_rep.log`) that is produced. This file might instead indicate where the installation routine halted.
  c. Correct the error.

  If the Genesys Installation Wizard for Interactive Insights was unable to access CMS, you might have specified incorrect connectivity parameters. Open either `gi2_setenv.bat` (on Windows platforms) or `gi2_setenv.sh` (on UNIX platforms), set the correct parameters, and save the file. You can retrieve the port number from the Central Configuration Manager by following the steps on page 21.

To run the installation scripts manually on Windows platforms, from the Interactive Insights folder:

- To deploy the Interactive Insights universe, reports, users, user groups, and permissions, run the `deploy_unv_rep.bat` batch script.
- To scan the BOE repository in order to confirm that its contents match those of the `insights.biar` file, run `gi2_deploy_sum.bat`.

On UNIX platforms, run the corresponding shell scripts to perform the same actions.

When you are finished, check the log file (`deploy_unv_rep.log`) for errors. After successful installation, Genesys recommends that you edit the `gi2_setenv.bat` file to remove the password, if you are concerned about security.

Manually Importing the GI2 Reports, Universe, Users, Groups, and Rights

The Interactive Insights universe holds the needed business objects and data elements for running the Interactive Insights reports. These data elements include classes, dimensions, measures, and conditions, as well as the reports themselves. Please refer to the *Genesys Interactive Insights 8.0 Universe Guide* for descriptions of universe elements.

The installation routine automatically imports the Genesys Interactive Insights universe, folders, reports, users, groups, and rights into your BusinessObjects environment. If, however, your installation does not finish; you delete the universe from the Central Management Console in error; you want to redeploy the same universe, reports, and folders to your existing environment; or you want to deploy the universe, reports, folders, users, groups, and rights to more than one environment, you must invoke and complete the pages of the BusinessObjects Import Wizard for universe elements to be available to Interactive Insights users.

Operating the Import Wizard

The Import Wizard is available on Windows platforms:

1. From the Windows `Start` menu, invoke the Business Objects Import Wizard.
2. At the `Welcome` page, click `Next`.
3. At the `Source environment` page, from the `Source` drop-down box, select `Business Intelligence Archive Resource (BIAR) File`.
4. To the right of the `BIAR file` field, click the button to navigate to the `insights.biar` file that was deployed during Interactive Insights installation. Select the file, and click `Next`.

5. On the `Destination environment` page, in the appropriate fields, specify the name of your Central Management Server (CMS), administrator login, and password, and then click `Next`.

   The Import Wizard checks that it can connect to CMS, which should include the connection port if it is anything other than the default—for example, `HOST:6402`.

6. At the `Select objects to import` page that is shown in Figure 6, select, at minimum, the following objects to import, and click `Next`:
   - `Import users and users groups`, with the following subcategories checked:
     - `Import application rights`
     - `Import root folder rights`
   - `Import folders and objects`
   - `Import universes`
   - `Import custom access levels`

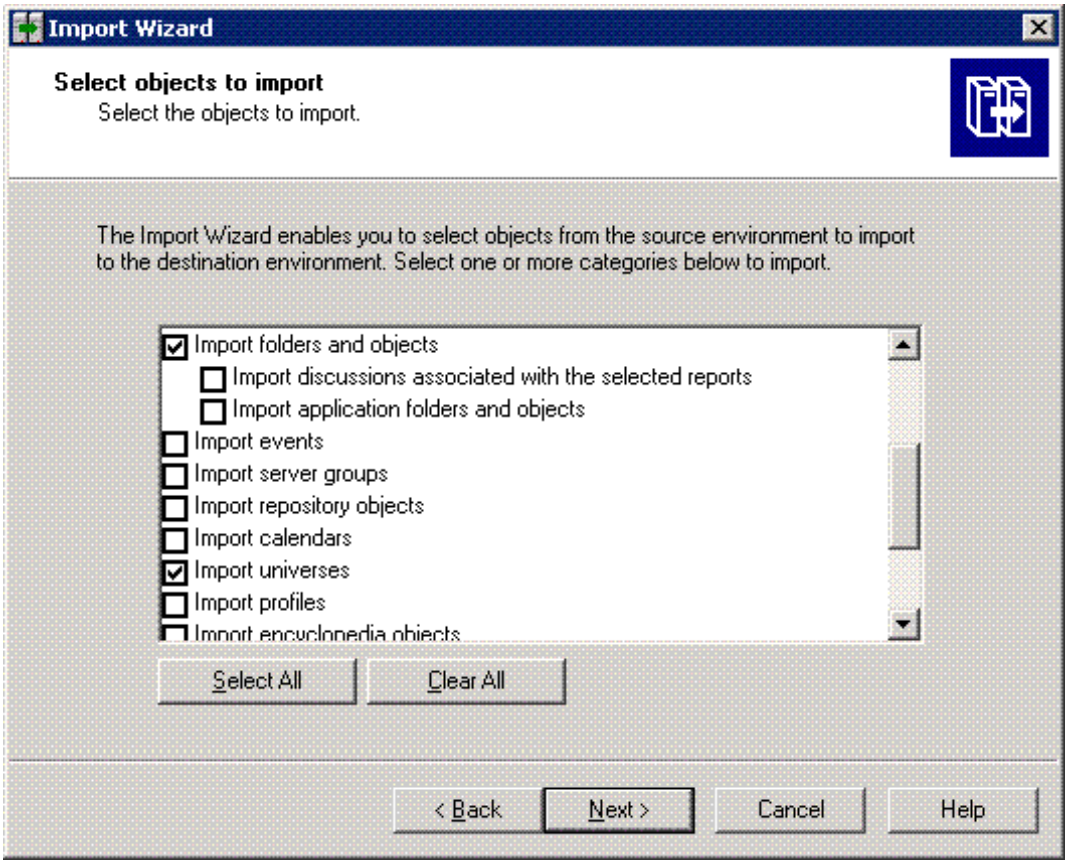


Figure 6: Cutaway of the Select Objects to Import Page of the Import Wizard

Note: The next pages of the Import Wizard depend on the selections that you make on the `Select objects to import` page. You can, in fact, select all objects without adversely affecting import of Interactive Insights elements. The following steps pertain to the minimum selections that are required to import Interactive Insights.

7. At the `Import scenario` page, select `Update the destination object. In case of name conflict, rename it,` and click `Next`.
8. At the `Incremental import` page, determine which objects and object rights should be overwritten, and click `Next`. Selections on this page are meaningless if you are importing the universe for the first time or if you are importing the universe to a new environment.
9. At the `Users and groups` page, select to import all groups and users, and click `Next`.
10. At the `Custom Access Levels` page, select to import all access levels, and click `Next`.
11. At the `Folders and objects` page, select the Interactive Insights root folder, and click `Next`. If you do not want to import all of the Interactive Insights reports or documentation, open this folder and the appropriate release subfolder, and clear one or more of the following boxes:

GI2 for GIM	GI2 for iWD
• Agents	• Capture Point
• Business Results	• Details
• Details	• Documentation
• Documentation	• Process
• Outbound Contact	• Queues
• Queues	• Resource

12. At the `Select application folders and objects` page, click `Next`.
13. At the `Import options for universes and connections` page, select the `Import all universes and all connection objects` option, and click `Next`.

Note: You cannot selectively indicate which elements of the universe to import.

14. At the `Import options for publications` page, select `Do not import recipients,` and click `Next`.
15. At the `A note on importing reports` page, click `Next`.
16. On the `Ready to import` page, the Import Wizard summarizes the objects that it will import according to your selections. Click `Back` to change any of your selections, or click `Finish` to start the import operation.

17. When the import completes, click `Done`.

Universe Contents

If you have imported the Interactive Insights universe successfully, your BusinessObjects environment will contain the following:

GI2 for GIM

- Three groups—`Interactive Insights report developers`, `Interactive Insights report editors`, and `Interactive Insights report viewers`
- Three users—`Developer`, `Editor`, and `Viewer`
- Nine folders—`Interactive Insights` and a numbered release folder, in both InfoView and CMC, and the following subfolders: `Agents`, `Business Results`, `Details`, `Documentation`, and `Queues`.
- Twenty-six objects—The Interactive Insights reports, two PDF documents (the *Genesys Interactive Insights 8.0 Universe Guide* and the *Genesys Interactive Insights 8.0 User's Guide*), and several measure maps that illustrate the relationships among measures. Refer to the *Genesys Interactive Insights 8.0 Universe Guide* for a complete listing and description of thesreports.
- One universe—`GI2_Universe`.
- One connection—`GI2_GIM_DB`.

GI2 for iWD

- Three groups—`Interactive Insights report developers`, `Interactive Insights report editors`, and `Interactive Insights report viewers`
- Three custom access levels—`Interactive Insights report developer access level`, `Interactive Insights report editor access level`, and `Interactive Insights report viewer access level`.
- Three users—`Developer`, `Editor`, and `Viewer`
- Ten folders—`Interactive Insights for iWD` and a numbered release folder in both InfoView and CMC, along with the following subfolders: `Capture Point`, `Details`, `Documentation`, `Process`, `Queues`, and `Resource`.
- Eleven objects—The nine Interactive Insights for iWD reports and two PDF documents (the *Genesys Interactive Insights 8.0 Universe Guide* and the *Genesys Interactive Insights 8.0 User's Guide*). Refer to the former document for a complete listing and description of these reports.
- One universe—`iWD_universe`.
- One connection—`GI2_iWD_DB`.

The connection objects are irrelevant to your environment, and you can safely ignore them. You can invoke the BusinessObjects' Central Management Console to verify that these elements have been deployed (under `Connections`, `Folders`, `Access Levels`, and `Universes`, and `Users and Groups`). The BIAR file also contains objects (such as measures, dimensions, and filters) which are imported via the Import Wizard, but the deployment of these elements is not reported on the wizard's summary page. The section below, "Viewing the

Interactive Insights Reports and Universe", describes yet another way to verify the import.

Refer to Business Objects *Using the Import Wizard* help file for more information about how to operate this utility.

Viewing the Interactive Insights Reports and Universe

When you have successfully installed Interactive Insights, you can view the Interactive Insights universe in Designer and the Interactive Insights reports in InfoView to confirm that the reports that you selected during installation are present. Keep in mind, however, that additional setup is required to use the report and universe elements actively. The additional steps for setting up the environment are described in Chapter 4 beginning on page 47.

Viewing the Universe

Figure 7 shows a cutaway of the Interactive Insights universe in Designer.

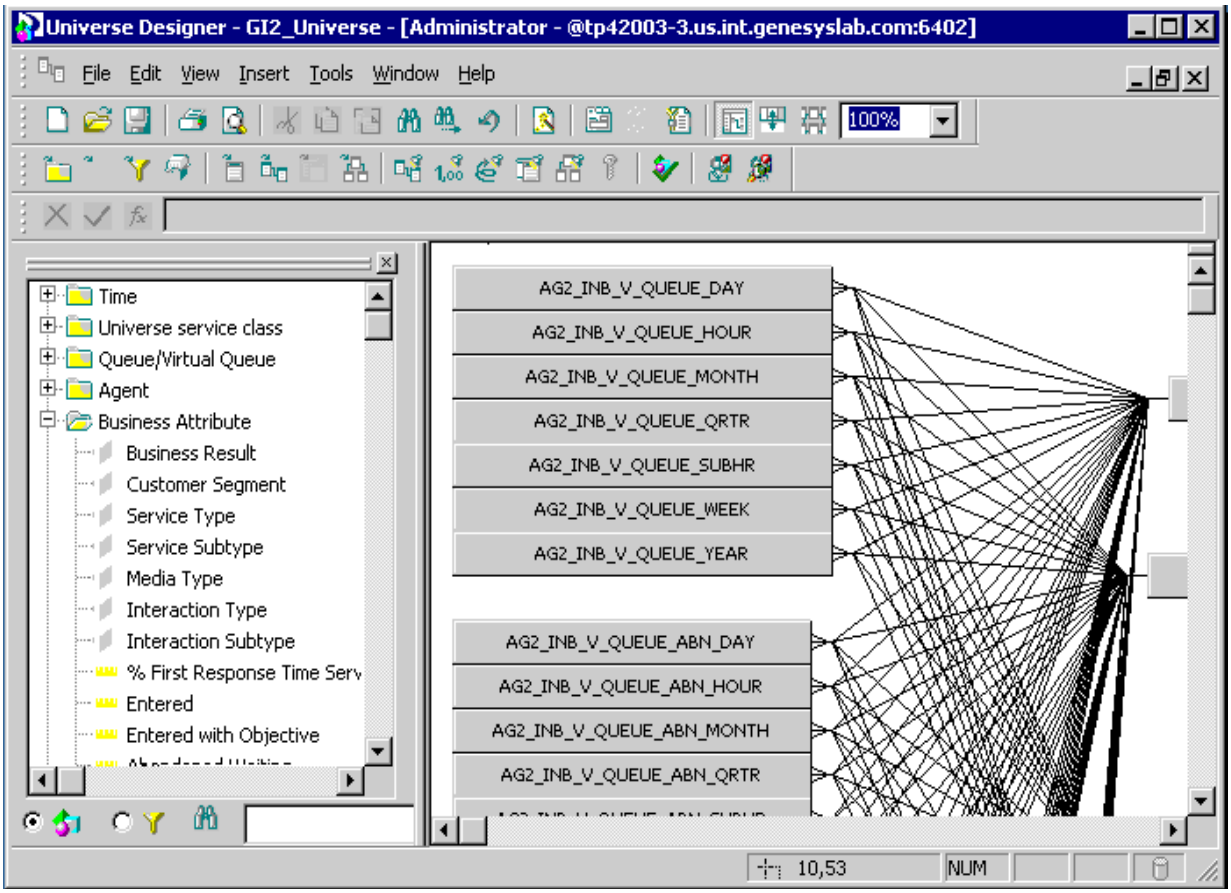


Figure 7: The Interactive Insights Universe in Designer

Refer to BusinessObjects documentation to learn about the Designer interface and to how to use this software.

Viewing the Interactive Insights Reports

Figure 8 shows the GI2 for GIM root folder, its subfolders, and some of the queue-based Interactive Insights reports in InfoView when expanded. The `Documentation` folder contains the *Genesys Interactive Insights 8.0 Universe Guide*, the *Genesys Interactive Insights 8.0 User's Guide*, and several maps that illustrate relationships between measures. If you manually imported the universe, the objects provided within the report subfolders will be dependent on the selections you made (Step 11 on page 40) during importation; otherwise, if the installation routine imported the universe and reports, all of the reports will be imported to the repository.

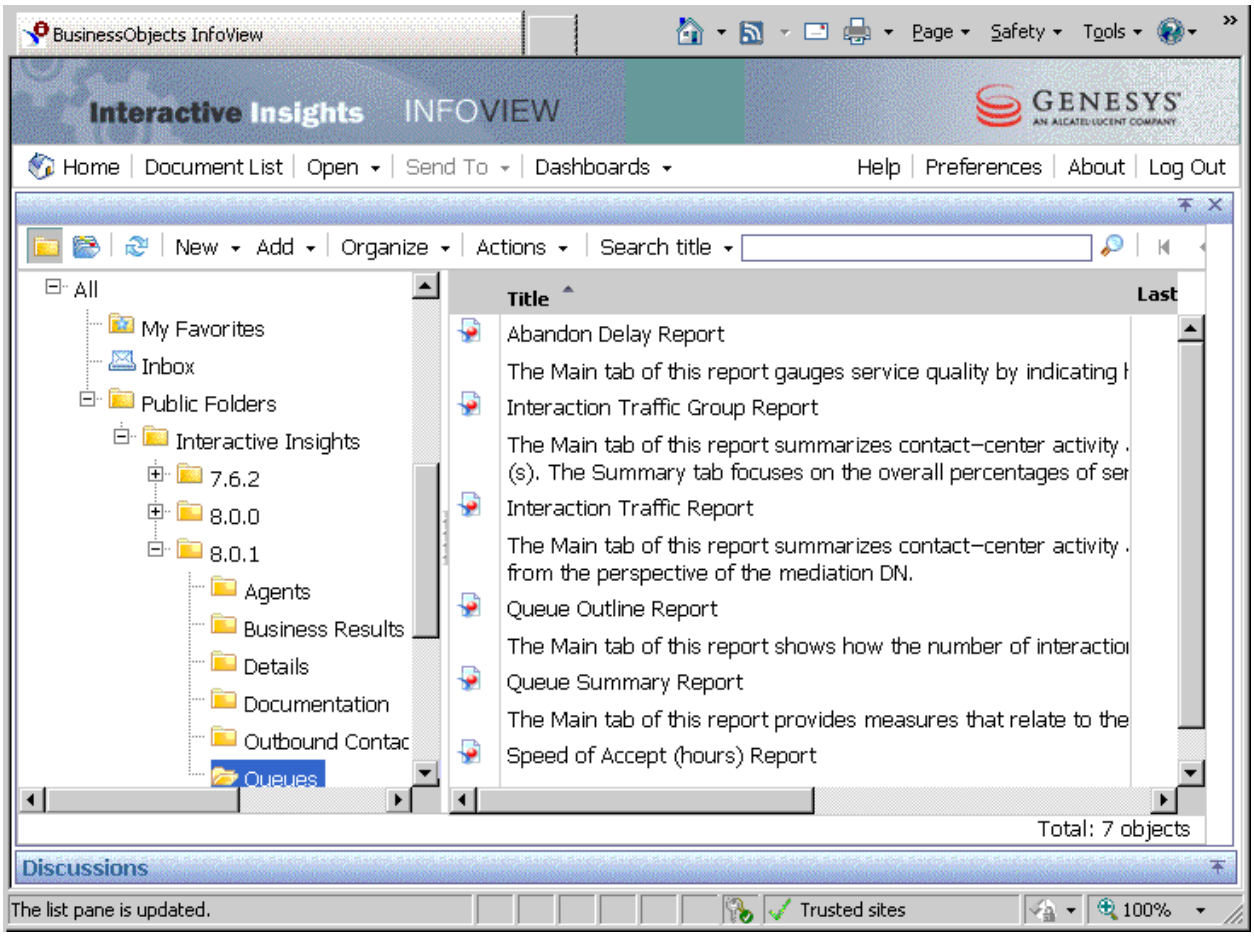


Figure 8: The Interactive Insights Reports in InfoView

Refer to BusinessObjects documentation for information about how to use InfoView and Web Intelligence.

Note: Beginning with the 7.6.2 release, a release-specific subfolder of the Interactive Insights root folder houses the report and documentation subfolders. For the initial 7.6.2 release, for example, this folder is aptly named `7.6.2`. This folder structure enables you to maintain the customizations that you may have applied to previous Interactive Insights universes. Text references and screen shots depicted throughout this documentation set, however, may either omit the subfolder containing the release number or the release number shown may differ from your release of Interactive Insights.

Interactive Insights Versioning

Starting with the 7.6.2 release, both the Interactive Insights universe and all reports are tagged with a version number that is stored inside the universe and within each report. Such labeling makes it easy to identify which Interactive Insights version of a report and which version of the universe you have, in the event that you initiate requests to Genesys Technical Support or have correspondence with other Genesys departments. This versioning might be further useful to your universe and report designers in distinguishing reports from other Interactive Insights releases, especially because the 7.6.2 release enables their coexistence.

Determining the Version of the Universe

The Interactive Insights universe defines the `GI2_UNIVERSE_VERSION` parameter to identify the version of the universe. This version-number parameter, which is shown in Figure 9, is accessed within Designer from the `File > Parameters` menu. Genesys recommends that you not change its value.

Note: The version number that is shown in the figure might not match your version of the Interactive Insights universe.

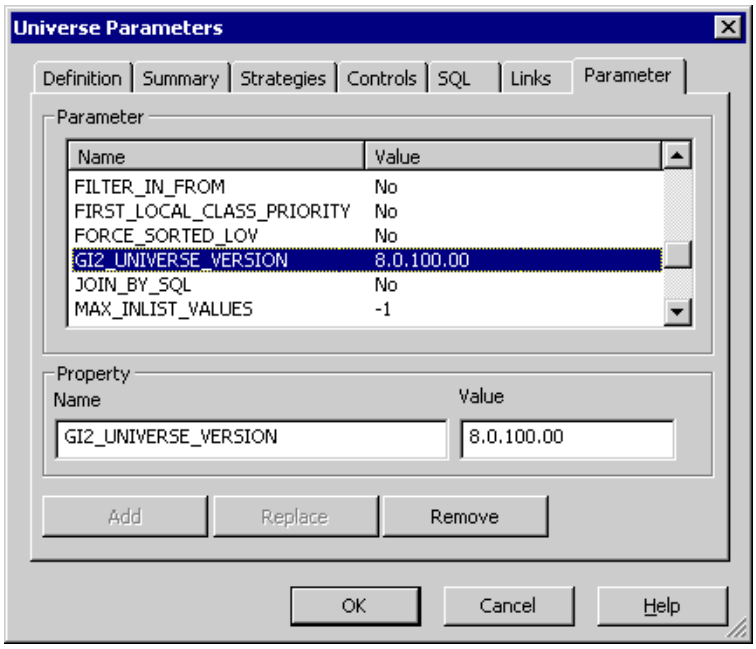


Figure 9: Universe Parameters

Determining the Version of a Report

Stored on the `Description` tab of each Interactive Insights report is a text string that represents the Interactive Insights version that is associated with the report. This version number is found after the descriptions of the measures that are used within the report (see Figure 10). Genesys recommends that you not change its value.

Agent Conduct Report

Report Description

The Main tab of this report pits agent performance in handling interactions against the agent's group, focusing on a few specific measures that demonstrate the possible mishandling of interactions – a high number of unaccepted interactions, excessive hold and after–call work (wrap) times, and shorter–than–usual engage (talk) durations with customers. The Summary tab provides three graphs to plot, by agent, the number of interactions that were abandoned while alerting at the agent's DN, the number of interactions that fall within the short–talk threshold, and the number of interactions that were rerouted from the agent's DN because the agent did not accept them. These measures provide relative performance and should be analyzed carefully before conclusions are drawn or corrective action is taken.

Measure Description

Column Name	Universe Measure Name	Description
Accepted	Activity \ Accepted	The total number of times that interactions that were assigned a business attribute were accepted, answered, or pulled by this agent, including warm consult interactions that the agent accepts.
Responses	Activity \ Responses	For voice and chat media, this measure represents the total number of times that interactions, that were assigned a business attribute, were answered or accepted by this agent. For e-mail, this measure represents the total number times that this agent prepared an outbound reply.
▪ ▪ ▪		
		▪ Agent Group Dimension: The average amount of time, in seconds, that agents who belong to this group had interactions on hold that were assigned a business attribute.
Avg Handle Time	Activity \ Avg Handle Time	The description of this measure is dependent on the universe elements by which this measure is dimensioned: ▪ Agent Dimension: The average amount of time, in seconds, that this agent spent handling interactions that the agent received. ▪ Agent Group Dimension: The average amount of time, in seconds, that agents who belong to this agent group spent handling interactions that the agents received.
Avg Wrap Time	Activity \ Avg Wrap Time	The description of this measure is dependent on the universe elements by which this measure is dimensioned: ▪ Agent Dimension: The average amount of time, in seconds, that this agent spent on interactions while in ACW (Wrap) state. ▪ Agent Group Dimension: The average amount of time, in seconds, that agents who belong to this agent group, spent on interactions while in ACW state.

Interactive Insights Report Version: 8.0.000

Summary | Main | Description

Figure 10: Report Version Is Visible on the Description Tab of the Report

Note: The version number that is shown in the figure might not match your version of the report.

Chapter

4 Setting Up the Environment

After you have installed Interactive Insights, you must run additional setup steps manually before you operate the Interactive Insights reports. This chapter describes these steps in the following sections:

- Readying GIM for Aggregation, page 47.
- Readying iWD Aggregation, page 48.
- Utility Views Specific to Interactive Insights, page 49.
- Customizing BOE After Fix Pack Installation, page 50.
- Linking the Universe to Your Data Mart, page 50.
- Manually Setting Up Interactive Insights Access Levels, Groups, and Permissions, page 55.
- Setting Data-Access Restrictions for Multi-Tenant Environments, page 63.
- Customizing Measure Definitions, page 67.

Readying GIM for Aggregation

A Genesys Info Mart 8.0 installation that has the Reporting and Analytics Aggregates (RAA) option deployed contains the tables and views that are referenced by the Interactive Insights reports. In addition, to prepare the GIM environment for Interactive Insights operation, you must perform additional setup steps, including:

- Repositioning the `\agg` subdirectory.
- Setting aggregation-related configuration options.

`Note:` It is no longer necessary to execute the `make_gi2.sql` script against Genesys Info Mart manually. Beginning with release 8.0.001.02, the aggregation engine performs this task automatically upon first run.

Reposition the \agg Subdirectory

The Interactive Insights installation routine deploys the `\agg` subdirectory to the GI2 root folder. This subdirectory and its contents, however, must be placed in the Genesys Info Mart root folder in order to be recognized by GIM. Copy this directory to the GIM root folder.

Set Aggregation-Related Options

To enable aggregation, you must appropriately set aggregation-related configuration options (such as `aggregation-engine-class-name`, `run-aggregates`, and the first-response and abandon-delay thresholds) in the Genesys Info Mart application object in Configuration Manager. These options are described in the *Reporting and Analytics Aggregates 8.0 Deployment Guide.*

Readying iWD Aggregation

The GI2 for iWD reports rely on data that is aggregated from the following:

- Task classification facts
- Task capture facts
- Task queue facts
- Task agent facts

As deployed, however, only task classification facts are enabled for aggregation. You must enable the remaining facts for aggregation by performing the following steps:

1. Stop iWD Data Mart runtime node.
2. Using an ASCII editor, open `plugins.properties`, add a row for each aggregate that you want to enable, and save.

   The `plugins.properties` file is located in the `\plugins` subfolder of the iWD root directory.

   The content of this file should be:

   ```
   ${KETTLE_REPOS_DIR}\plugins\classif,task_classif_fact
   ${KETTLE_REPOS_DIR}\plugins\agent,task_agent_fact
   ${KETTLE_REPOS_DIR}\plugins\capt,task_capt_fact
   ${KETTLE_REPOS_DIR}\plugins\queue,task_queue_fact
   ```
3. Run the iWD database upgrade command-line utility, `dbup_dm.cmd`, to see the effect of these changes.

Refer to the following sections within the iWD documentation set for additional information:

- The "Customizing iWD" chapter of the *intelligent Workload Distribution 8.0 Data Mart Reference Manual* for guidelines on adding custom aggregates.
- "Creating the iWD Data Mart Database" procedure in the *intelligent Workload Distribution 8.0 Deployment Guide* for information about the iWD database upgrade utility.

Utility Views Specific to Interactive Insights

Running aggregation for the first time executes the `make_gi2.sql` script (that the Interactive Insights installation routine deploys) against your Genesys Info Mart database to set up the necessary views for the Interactive Insights reports. For Interactive Insights for iWD, however, you must run this script manually.

Among the views created for this purpose are the following:

GI2 for GIM

- `TODAY`
- `RELATIVE_RANGE`
- `GI2_CONSTANTS`
- `INTERACTION_DESCRIPTOR_GI2`
- `INTERACTION_FACT_GI2`
- `INTERACTION_RESOURCE_FACT_GI2`
- `INTERACTION_TYPE_GI2`
- `IXN_RESOURCE_STATE_FACT_GI2`
- `MEDIATION_SEGMENT_FACT_GI2`
- `SM_RES_SESSION_FACT_GI2`
- `SM_RES_STATE_FACT_GI2`
- `SM_RES_STATE_REASON_FACT_GI2`

GI2 for iWD

- `TODAY`
- `RELATIVE_RANGE`
- `GI2_CONSTANTS`

Manually Running the make_gi2.sql Script

Interactive Insights for iWD requires that you manually run the `make_gi2.sql` script to deploy utility views to iWD Data Mart:

1. From the `Interactive Insights for iWD\sql_scripts` folder, select the appropriate subfolder for your RDBMS.
2. Run the `make_gi2.sql` script against your iWD 8.0 Data Mart database.
3. Verify that the script executed successfully by checking the script's output for errors. Ignore any errors about dropping nonexistent tables and/or nonexistent views.

GIM Multi-Tenant Environments

For GIM environments that contain more than one tenant, run RAA with the `updateAliases` runtime parameter to create tenant views of Interactive Insights objects. Refer to the *Reporting and Analytics Aggregates 8.0 Deployment Guide* and the *Reporting and Analytics Aggregates User's Guide* for the description of this parameter and an example of its use respectively.

Customizing BOE After Fix Pack Installation

The fix packs that are provided by SAP come with their own installer. The latest supported fix pack, if any, is provided in the Genesys-provided installation package (IP). This software provides a patch to BOE software and must be installed manually after BOE installation. Instructions for installing the fix pack are also provided in the IP.

If you install this fix pack after installation of Interactive Insights, you must also re-execute the `gi2_customize_bo` script. (This script is described on page 86.) The Interactive Insights installation routine silently runs this script to customize the appearance of BOE; however, deploying the fix pack removes the customizations.

Linking the Universe to Your Data Mart

The Interactive Insights reports call upon measures that were designed using BusinessObjects Universe Designer. These measures are predefined in the Interactive Insights universe that you imported but they are not preconnected to your specific Genesys data source out of the box. You must define such a connection and assign it within Designer so that the reports that reference these measures will pull contact center data from your Info Mart or enterprise data from your iWD Data Mart.

Importing the Universe to Designer

There are many ways to define database connections. The first step, however, is to import the Interactive Insights universe to your local Designer application, as follows:

1. From the `Start` menu, select `BusinessObjects XI 3.1`, `BusinessObjects Enterprise`, and then `Designer`.

2. At the `User Identification` dialog box, specify connectivity parameters to CMS, and click `OK`. If the port number is different from the default, you must specify it along with the host in the `System` field—for example, `tp42003-3:6402`.
3. At the `Quick Design Wizard – Welcome Screen`, click `Cancel`.
4. From the `File` menu, click `Import`.
5. At the `Import Universe` dialog box, click the `Browse` button to open the `Select a Universe Folder` dialog box.
6. Select the appropriate release-specific, Interactive Insights subfolder, and click `OK`. For example, Figure 11 shows the `8.0.1` folder selected for the `techpubs4` host in this dialog box.

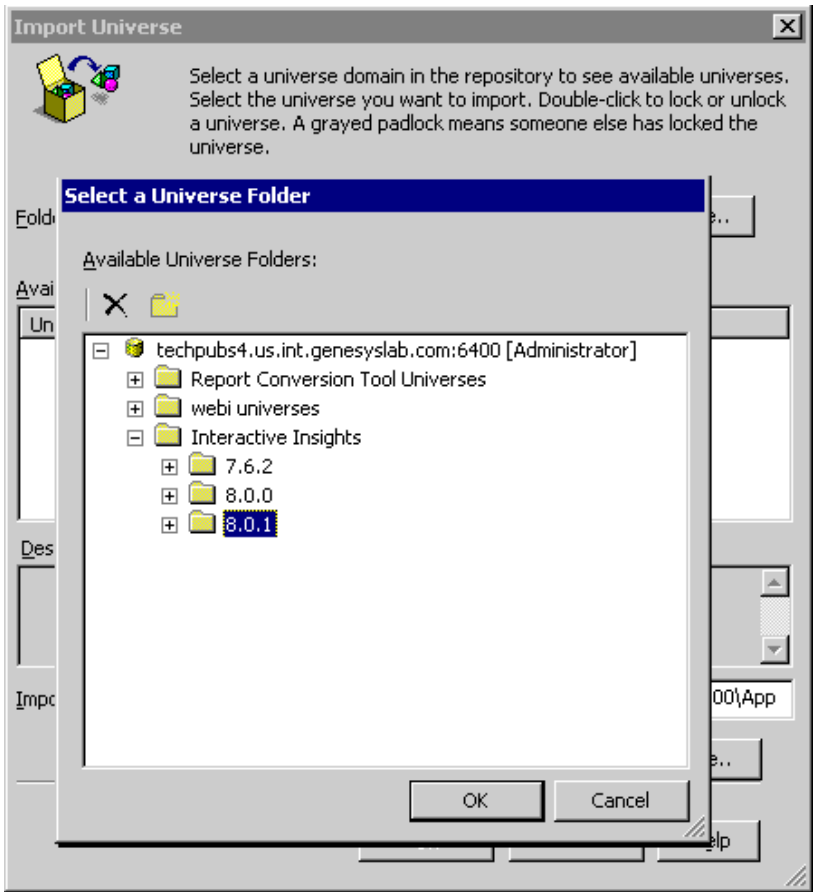


Figure 11: The Root Folder of the BOE Repository

7. Select the `GI2_Universe` or `iWD_universe` universe from the `Available Universes` frame, and click `OK`.

Designer imports the universe and displays its classes, objects, and table relationships in the Universe Window. A local copy of the universe is now available on your workstation for viewing and editing universe elements. Any changes you make to the definitions of universe elements will have to be ported back to the repository after editing. See “Customizing Measure

Definitions" on page 67 and "Exporting the Universe Back to the Repository" on page 54 for further information.

Defining a New Connection

Now, you can define a connection to link these universe objects to the tables in your Info Mart. The following describes the steps for establishing an Oracle Client data source connection. The steps and the pages of the `New Connection Wizard` might be different for other driver types:

1. From the `Tools` menu, select `Connections`. The `Connections List` page of the Wizard Connection displays.
2. Click the `Add` button to start the `New Connection Wizard`.
3. On the `Welcome` page, click `Next`.
4. At the `Database Middleware Selection` page, type a unique name for your data source connection, select the driver for the RDBMS type of your Genesys data source, and click `Next`. Figure 12 illustrates the creation of the `TechPubs4` connection.
5. At the `Login Parameters` page, specify the connectivity parameters to the desired database schema of your Info Mart or iWD Data Mart, and click `Next`.

   The parameters that you specify may be to the owner's schema, which would enable users to generate and display the results of several tenants in one report.
6. At the `Configuration Parameters` page, define advanced parameters for accessing the data mart and click `Next`.

   `Note:` This step does not appear for all driver types.
7. Specify any custom parameters at the `Custom Parameters` page, and click `Finish`.

   The `Custom Parameters` page closes, and focus returns to the `Connections List` page of the Wizard Connection.

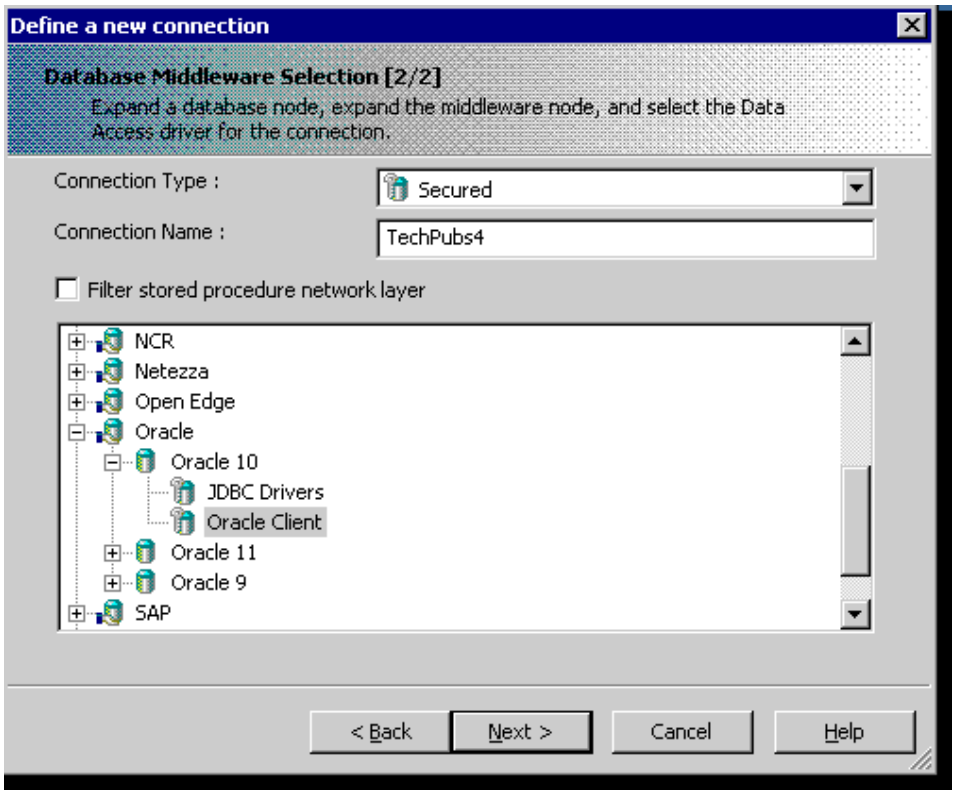


Figure 12: Defining an Oracle Client Connection

8. GI2 for GIM: For multi-tenant environments in which you have prepared Info Mart read-only views for tenants, repeat Steps 2 through 6 to define a connection for each tenant schema in your Info Mart (or to each tenant's database, depending on your particular RDBMS type).

   This connection will restrict one tenant's access, so that the tenant cannot view another tenant's data.

9. Select your connection from the connections list, test it if you want, and click `Finish`.

This connection has been defined for your local workstation, but you must assign it to the Interactive Insights universe and export the universe back to the Business Objects repository for the connection to be available to others who might run reports. Refer to the "Connecting to Your Data Source" and "Exporting the Universe Back to the Repository" sections that follow.

Connecting to Your Data Source

If you created a connection from the"Defining a New Connection" section or already have defined a connection to your data source, use it to connect the Interactive Insights universe to it:

1. From the `File` menu in Designer, select `Parameters`. The `Universe Parameters` dialog box displays.

2. Select your connection from the `Connection` dropdown list box, test it if you want, and click `OK`.
3. Save the universe (`File` > `Save`).

`Note:` Connecting to a specific tenant's schema will prevent you from viewing results across other tenants. You must specify the connection that has been established for the owner's schema in order to view the results from multiple tenants in one report.

Figure 13 shows a user selecting the `TechPubs4` connection, which was created earlier under "Defining a New Connection" (Step 4 on page 52).

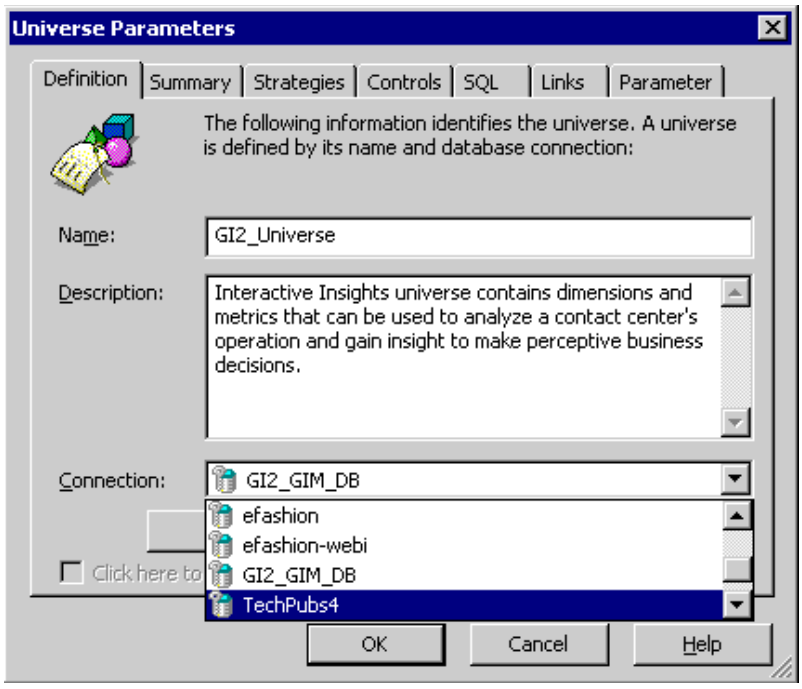


Figure 13: Setting the Connection

Exporting the Universe Back to the Repository

The changes that you make to the universe are local. To make them available to others who might run reports, you must export the universe back to the repository, as follows:

1. From the `File` menu, select `Export`. The `Export Universe` dialog box displays, as shown in Figure 14.
2. From the `Groups` frame, select all of the groups to which this connection applies.
3. From the `Universes` frame, select the name of your universe (for example, `GI2_Universe`), and click `OK`.

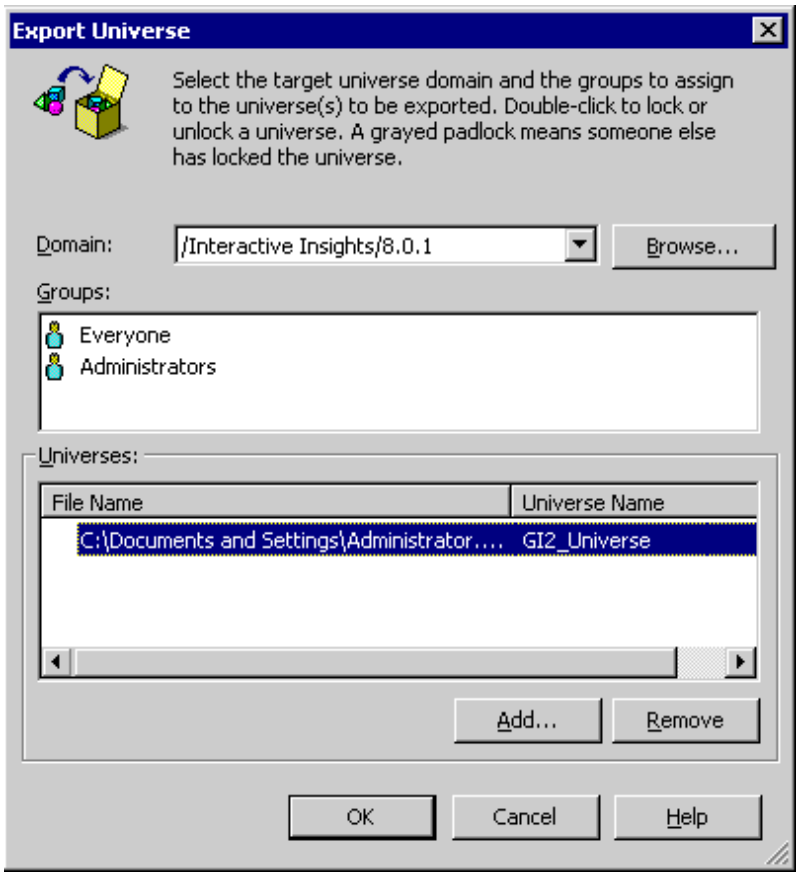


Figure 14: Exporting Changes Back to the Repository

The updated universe—with connection to your data source defined—is now available to the user groups that you specified.

Manually Setting Up Interactive Insights Access Levels, Groups, and Permissions

The Interactive Insights installation routine silently deploys the Interactive Insights objects that are stored in the `insights.biar` file as well as the permissions assigned to these and other objects. Among these objects are the following Interactive Insights groups and users (and passwords):

Group	User (Default Password)
• `Interactive Insights report developers`	• `Developer` (`gi2_user`)
• `Interactive Insights report editors`	• `Editor` (`gi2_user`)
• `Interactive Insights report viewers`	• `Viewer` (`gi2_user`)

If you want to import these objects or change their permissions manually, as the Business Objects administrator, you can either use the Import Wizard to import these objects with their permissions applied to universe elements (see

"Manually Importing the GI2 Reports, Universe, Users, Groups, and Rights" on page 38), or create the objects yourself from scratch and assign permissions to various objects by following the instructions in these sections:

- "Setting Up Access Levels" on page 56
- "Creating Interactive Insights Groups" on page 59
- "Hiding Unused Folders" on page 60
- "Setting Permissions for BOE Objects" on page 61

Note: If your installation of Interactive Insights was successful, prior to importing the universe manually by using the Import Wizard, remove any Interactive Insights objects that exist in the Business Objects repository, so as to avoid creating duplicate objects (following Step 3 on page 82).

After importation, you can view the Interactive Insights users and groups in CMC. Figure 15 shows the added groups.

Consider changing the passwords of the default users if you are concemed with security.

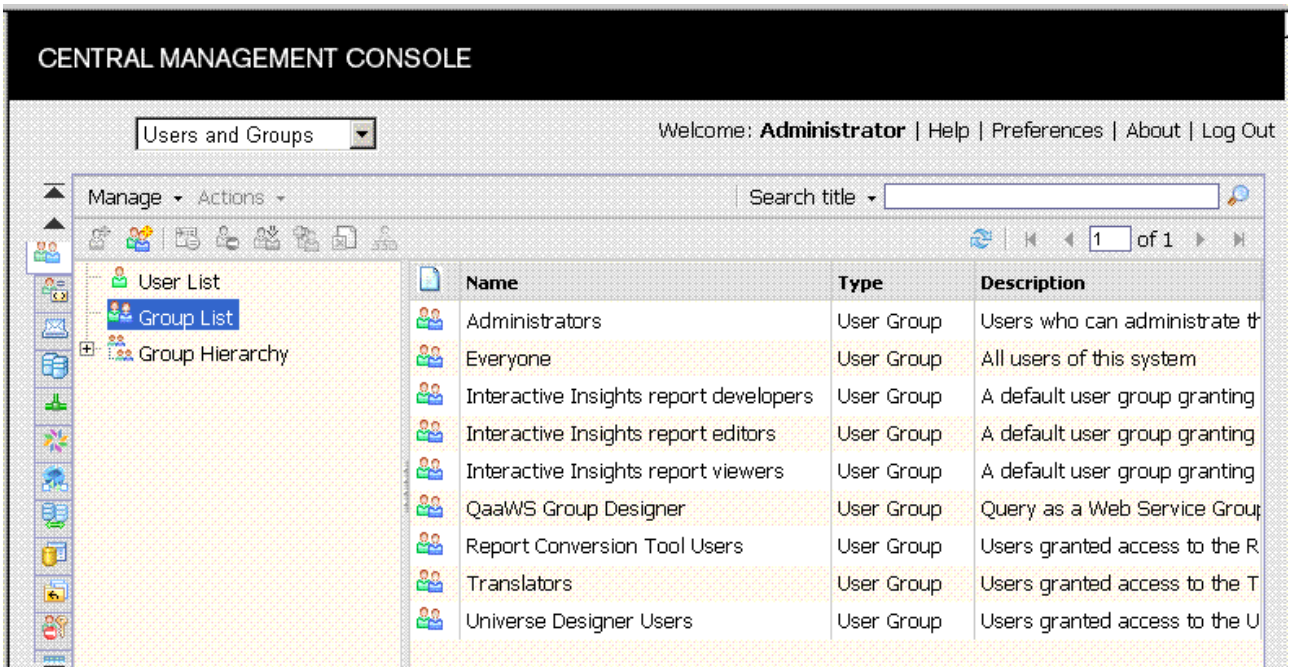


Figure 15: Viewing the Default BOE and Interactive Insights Groups in CMC

Setting Up Access Levels

If you opt not run the Import Wizard to deploy the Interactive Insights report access levels (which are groupings of permissions that are applied to groups and/or users), as the administrative user within the Central Management

Console, you can create them manually. Interactive Insights predefines the following access levels:

- `Interactive Insights report developer access level`
- `Interactive Insights report editor access level`
- `Interactive Insights report viewer access level`

Though these access levels correspond to the three Interactive Insights groups, the access levels are progressive.

To manually create these access levels, perform the following steps within the Central Management Console:

1. Select the `Access Levels` section.
2. Click `Manage > New > Create Access Level.`
3. Name the access level "`Interactive Insights report developer access level`", and click `OK`.
4. Double-click the access level that you just created to open its properties.
5. Under `Included Rights,` click `Add/Remove Rights,` select the appropriate rights for each collection (shown in Table 1), and then, click `OK`.
6. Click `Close` to save the definition.
7. Repeat Steps 2–6 for the remaining two Interactive Insights access levels.

Table 1: Definitions of the Predefined Interactive Insights Access Levels

Collection	Type	Name of Right	Access Levels*		
			D	E	V
System	Connection	Data Access	✓	✓	✓
General	General	Add objects to folders that the users owns	✓	✓	
		Add objects to the folder	✓	✓	
		Copy objects that the user owns to another folder	✓	✓	
		Copy objects to another folder	✓	✓	
		Delete instance	✓		
		Delete instances that the user owns	✓		
		Delete objects	✓		
		Delete objects that the user owns	✓		
		Edit objects	✓	✓	
		Edit objects that the user owns	✓	✓	✓
		Modify the rights users have to objects	✓		
		Modify the rights users have to objects that the user owns	✓		
		Schedule document that the user owns			✓

Table 1: Definitions of the Predefined Interactive Insights Access Levels (Continued)

Collection	Type	Name of Right	Access Levels*		
			D	E	V
Application	WebI	Data Tracking: Enable for users			✕
		Data Tracking: Enable format display changes by users			✕
		Enable drill mode		✓	✓
		Enable formula and variable creation			✕
		Enable HTML Report Panel		✓	✕
		Enable interactive HTML viewing (if license permits)			✕
		Enable Java Report Panel			✕
		Enable Query - HTML			✕
		Extend scope of analysis		✓	✓
		Edit this object		✓	
Application	WebI	Interactive: Formatting - Enable toolbar and menus			✕
		Interactive: General - Ability to hide / show toolbars			✕
		Interactive: General - Edit 'My Preferences'			✕
		Interactive: General - Enable right click menu			✕
		Interactive: Left pane - Enable available objects, tables and charts			✕
		Interactive: Left pane - Enable data summary			✕
		Interactive: Left pane - Enable document structure and filters			✕
		Interactive: Left pane - Enable document summary			✕
		Interactive: Reporting - Apply and remove existing alerts			✕
		Interactive: Reporting - Create and edit break			✕
		Interactive: Reporting - Create and edit predefined calculation			✕
		Interactive: Reporting - Create and edit report filter			✕
		Interactive: Reporting - Create and edit sort			✕
		Interactive: Reporting - Insert and remove report, table, chart and cell			✕
		View SQL			✕
		Web Intelligence Rich Client: Save a document locally on the file system			✕
		Web Intelligence Rich Client: Create a document			✕
		Web Intelligence Rich Client: Enable a client to use it			✕
		Web Intelligence Rich Client: Export a document			✕
		Web Intelligence Rich Client: Import a document			✕
		Web Intelligence Rich Client: Print a document			✕
		Web Intelligence Rich Client: Save a document for all users			✕
		Web Intelligence Rich Client: Send by mail			✕

Table 1: Definitions of the Predefined Interactive Insights Access Levels (Continued)

Collection	Type	Name of Right	Access Levels*		
			D	E	V
Content	WebI	Edit Query	✓		
		View SQL	✓		
		Export the report's data			✓
		Refresh List of Values			✓
		Refresh the report's data			✓
		Save as CSV			✓

*. D=Interactive Insights report developer access level
E=Interactive Insights report editor access level
V=Interactive Insights report viewer access level

Creating Interactive Insights Groups

In addition to the Interactive Insights access levels, the Import Wizard also deploys Interactive Insights user groups. You can create them manually and add users as follows:

1. Select the `Users and Groups` section and, over the `Group List` item, right-click `New Group`.
2. At the `Create New User Group` page, type the following, and then click `OK`:
   a. In the `Group Name` field, type `Interactive Insights report developers`.
   b. In the `Description` field, provide an appropriate description.
3. Right-click `Interactive Insights report developers`; then, from the context menu that appears, select `User Security`.
4. Click the `Add Principals` button.
5. On the `Add Principals` page, mark the `Users` radio button.
6. From the `Available users/groups` list box, select `Developer` and any other user who belongs to this group, and move it to the `Selected users/groups` list box.
7. Click `Add and Assign Security`, and click `OK` twice.
8. Click `Close` to close the user security properties.
9. Repeat Steps 2–8 to create the following user groups:
   - `Interactive Insights report editors`
   - `Interactive Insights report viewers`

To maintain flexibility, permissions (other than the default) are not assigned to the Interactive Insights users or groups. Instead, Genesys recommends that you assign permissions directly to the objects that users access. This procedure is described in “Setting Permissions for BOE Objects” on page 61.

Hiding Unused Folders

BusinessObjects Enterprise XI 3.1 software includes folders that are not used by Interactive Insights. Among them are the following:

- `Administration Tools`
- `Auditor`
- `Feature Samples`
- `Report Conversion Tool`
- `Report Samples`
- `Search Program`

To hide these folders from users in the Interactive Insights report groups, as the administrative user within the Central Management Console, under the `Folders` section, perform the following steps for each folder:

1. Right-click the desired folder; then, from the context menu that appears, select `User Security`.
2. Click the `Add Principals` button.

   The `Add Principals` page appears, as shown in Figure 16.

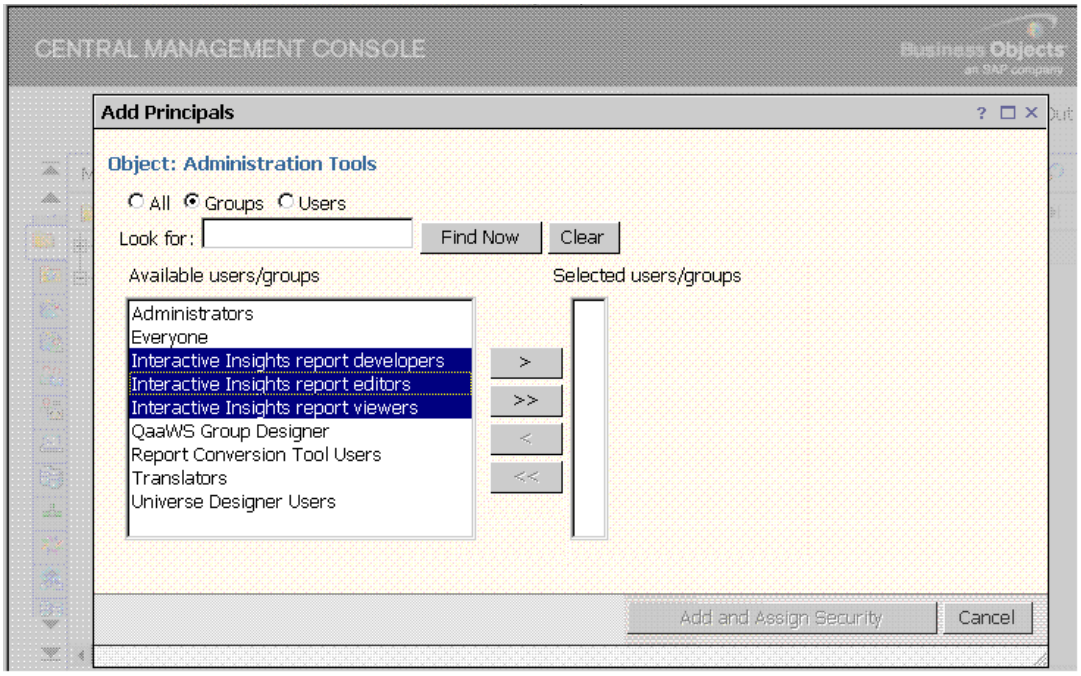


Figure 16: Adding Principals to a Folder's Security Profile

3. Mark the `Groups` radio button.
4. From the `Available users/groups` list box, select the three Interactive Insights user groups, and move them to the `Selected users/groups` list box.
5. Click the `Add and Assign Security` button.

   The `Assign Security` page appears, as shown in Figure 17.

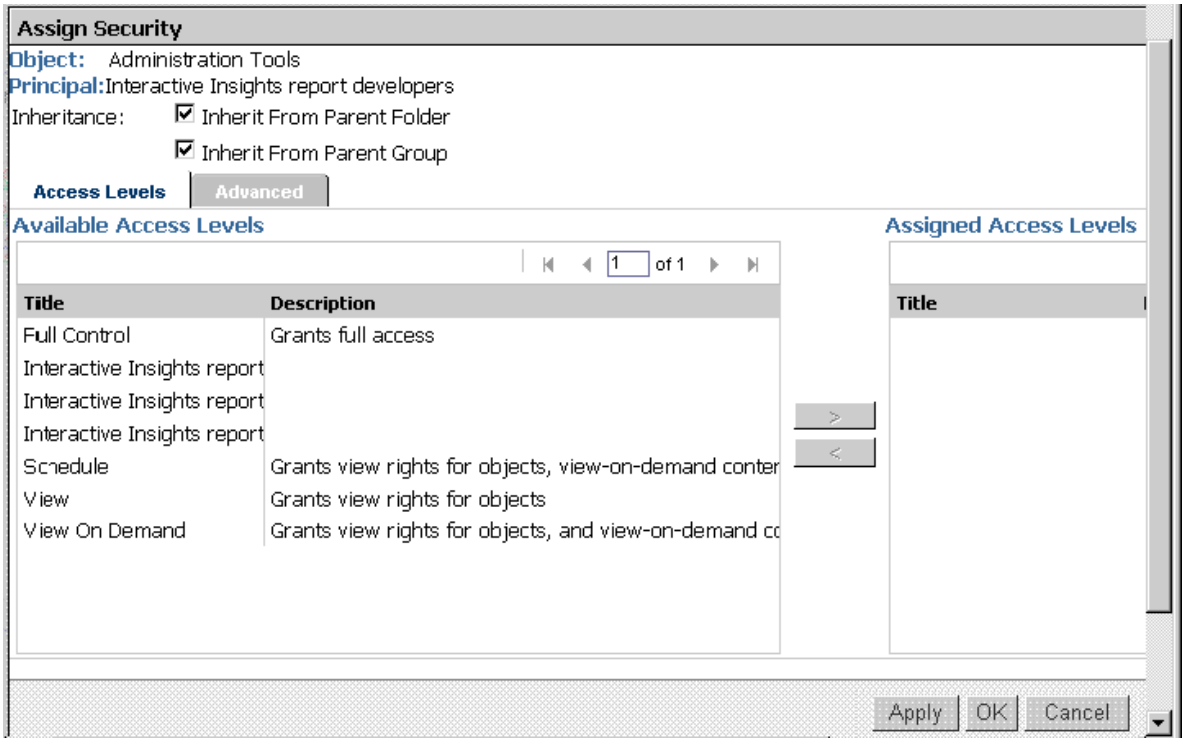


Figure 17: Assigning Access Levels to Folders for Selected Principals

6. Clear the `Inherit From Parent Folder` and `Inherit From Parent Group` boxes, and click `OK`.

   Because no access levels were explicitly selected, CMC displays a dialog box that prompts you to confirm this action.

7. At the confirmation box, click `OK`.

   CMC returns to the `User Security` properties of your selected folder and displays the added groups.

8. Click `Close`.

With these changes applied to each folder, the folders will be invisible to Interactive Insights users within InfoView and Web Intelligence. Note that administrative users, having full control, will continue to see them.

Setting Permissions for BOE Objects

You can manually set permissions on the objects used by Interactive Insights, including the universe, the Interactive Insights folder and connection, and even the InfoView and Web Intelligence applications. Table 2 lists the user security properties of objects that the Interactive Insights installation routine sets. To set these manually, perform the following steps within Central Management Console as the administrative user:

1. You can set top level security for root objects or user security for other objects:

- To set top level security, open the appropriate CMC section, select `Manage > Top-Level Security > All <Objects>`.
- To set user permissions, open the appropriate CMC section, right-click the desired object from that section, and select `User Security`.

2. Click the `Add Principals` button, and mark the `Groups` radio button.
3. From the `Available users/groups` list box, select the groups indicated for the object from Table 2 and move them to the `Selected users/groups` list box.
4. Click the `Add and Assign Security` button, either clear or mark the `Inherit From Parent Folder` and `Inherit From Parent Group` boxes as indicated in Table 2 for the object, and apply your changes.
   a. Under the `Access Levels` tab, select the appropriate access level from the `Available Access Levels` list, and move it to the `Assigned Access Levels` list:
   b. Apply your changes, and click `OK`.
5. Click `Close` to close the user security properties.

Table 2: Mapping of Access Levels to BOE Objects

CMC Section	Object Name	Principal*	Inheritance From ...		Access Level†					
			Parent Folder	Parent Group	D	E	V	Full	V	VOD
Connections	< Connections root folder >	Developers	×	×	×		×			
	GI2_GIM_DB or GI2_iWD_DB	Editors	×	×			×			
		Viewers	×	×			×			
Universes	< Universe root folder >	Developers	×	×					×	
	Interactive Insights [folder]	Developers	×	×				×		
	GI2_Universe or iWD_universe	Editors	×	×		×	×			
		Viewers	×	×			×			
Applications	Web Intelligence	Developers	×	×				×		
		Editors	×	×		×				
		Viewers	×	×			×			
	InfoView	Developers	×	×						×
		Editors	×	×						×
		Viewers	×	×						×
	Designer	Developers	×	×				×		

Table 2: Mapping of Access Levels to BOE Objects (Continued)

CMC Section	Object Name	Principal*	Inheritance From ...		Access Level†					
			Parent Folder	Parent Group	D	E	V	Full	V	VOD
Folders	< InfoView root >	Developers	×	×					×	
		Editors	×	×					×	
		Viewers	×	×					×	
	Interactive Insights or Interactive Insights for iWD [folder]	Developers	✓	×	×	×	×			
		Editors	✓	×		×	×			
		Viewers	✓	×			×			

*** Principals**
Interactive Insights report developers
Interactive Insights report viewers
Interactive Insights report editors

† Access Levels
D= Interactive Insights report developer access level
E = Interactive Insights report editor access level
V = Interactive Insights report viewer access level
Full = Full Control
V = View
VOD = View On Demand

Setting Data-Access Restrictions for Multi-Tenant Environments

In addition to the permissions that you can set within CMC to control access to various BOE repository elements, you can also set restrictions on user access to data by limiting the objects, rows, query types, and connections that are available to users through the Designer application. Business Objects defines a *restriction* as a named group of constraints that can be applied to a group or user account for a universe.

Through the use of restrictions, administrators can affect who sees which data in the Interactive Insights reports. This is a particularly useful feature when it is applied to a data source that stores data for more than one tenant. For instance, within one universe, an administrator can define several connections—each of which accesses a different tenant view within the same Info Mart—and then create and apply connection restrictions to each tenant to ensure that its users see only the data that is pertinent to that tenant.

The login to Web Intelligence identifies the user (and hence the user group) and the access permissions that are assigned to that user within the repository; the restriction defines which connection the user can use to access data within a specific universe. No changes to the definitions of dimensions or measures, for instance, or to the design of the reports would be required to provide tenant-specific data in your reports.

The benefits of this one-universe approach should be obvious—for example:

- Consistency in measure definitions across the enterprise.
- Reduced maintenance costs—having to manage only one universe (instead of one universe per tenant).
- Single source.
- Optimized use of network resources.

`Note:` GIM supports several methods of configuring multi-tenant environments, including:

- A separate schema per tenant.
- One database/one schema for all tenants (where everyone can see everyone else's data).

Configuration depends largely on the capabilities that are provided by your chosen RDBMS and on the data access security measures that are established within your enterprise. Please refer to the Genesys Info Mart 8.0 documentation set for further information.

One possible configuration, however, is particularly noteworthy for a Microsoft SQL 2005 RDBMS. In the scenario in which a separate schema has been created within one database for each tenant, you must ensure that individual tenant logins map to the respective database owner for the tenant schema or that the default schema for each tenant login matches that of the owner for that schema. Furthermore, this login cannot be `sysadmin`. Otherwise, elements in the Interactive Insights universe might point to an unintended set of objects in Info Mart.

Creating Users and Groups in Multi-Tenant Environments

The steps that are provided on page 55 describe the procedures for creating Interactive Insights users and groups and assigning users and groups to various repository elements. The naming convention that was used for the users and groups and the presentation of the steps were biased toward setup of a single-tenant environment. However, with the exception of the names that you choose for users/groups, the procedures are identical for multi-tenant environments.

1. If you have not done so already, complete the steps that are defined in the following sections to add Interactive Insights views to each tenant schema (or database, as applicable) and to define connections to them, respectively:

- "Utility Views Specific to Interactive Insights" on page 49
- "Linking the Universe to Your Data Mart" on page 50

`Note:` When you are naming data-source connections (Step 4, page 52), consider choosing tenant-identifying names, such as *`Tenant1`* `Connection` or `GI2_`*`Tenant2`*`_Oracle10g`.

---

2. To set up users and groups for your tenants, follow the steps that are provided in "Manually Setting Up Interactive Insights Access Levels, Groups, and Permissions" on page 55—again, choosing tenant-identifying names, such as:
   - *Tenant1* `Report Viewers` (group) and
   - *Tenant1* `Viewer` (user).

   `Note:` The concept of assigning user and group permissions in CMC to connections (discussed on page 61) is different from the concept of assigning connection restrictions to users and groups within Designer. Within CMC, you cannot define a connections map within one universe to map different data-source connections to defined users and/or groups as you can in Designer.

Creating Connection Restrictions

Within Designer, administrators can create and define restrictions in the `Manage Access Restrictions` dialog box, which is shown in Figure 18.

To create a connection restriction and apply it to the tenant users and groups that you created earlier in Step 2 (page 65):

1. From the `Tools` menu within Designer, select `Manage security > Manage Access Restrictions`. The `Manage Access Restrictions` dialog box appears.
2. Click `New` to open the `Edit Restrictions` dialog box, in which you can create a new restriction.
3. In the `Restriction Name` field, name the restriction for a particular tenant appropriately—for example, `Tenant1 Connection Restriction`.

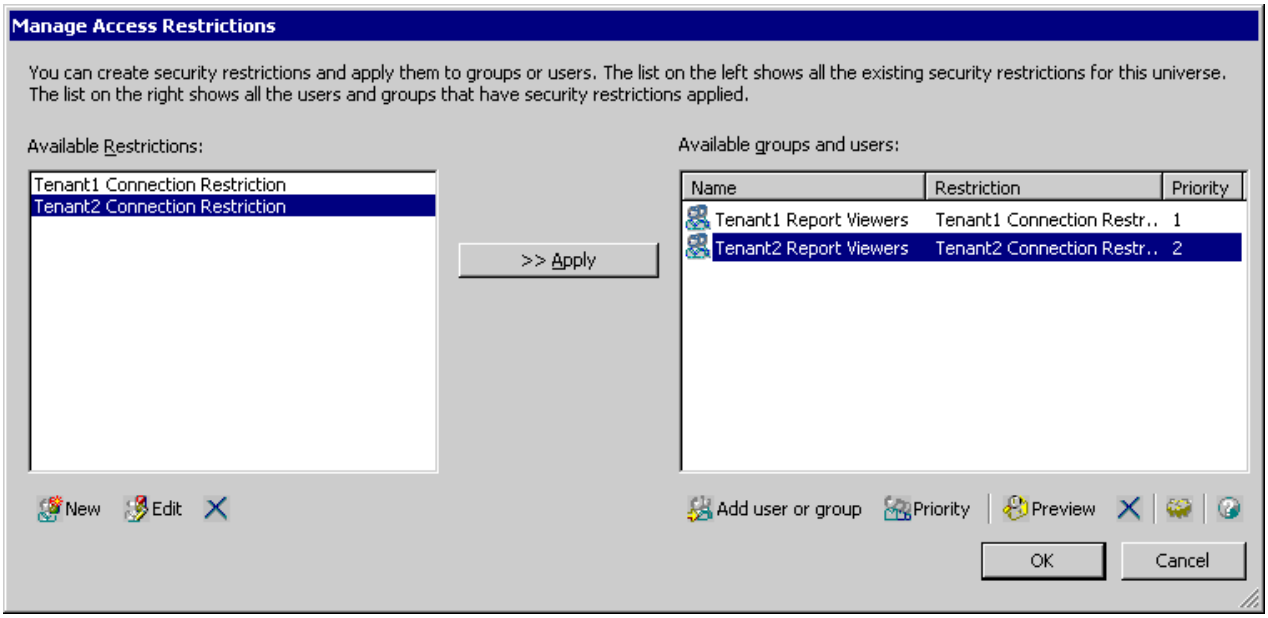


Figure 18: The Manage Access Restrictions Dialog Box Showing Two Restrictions

4. On the `Connection` tab, select the appropriate data-source connection for the tenant—for example, `GI2_Tenant1_MSSQL`.

   Figure 19 shows these selections in the `Edit Restrictions` dialog box.

5. Click `OK` to save the restriction, close the `Edit Restrictions` dialog box, and return control to the `Manage Access Restrictions` dialog box.

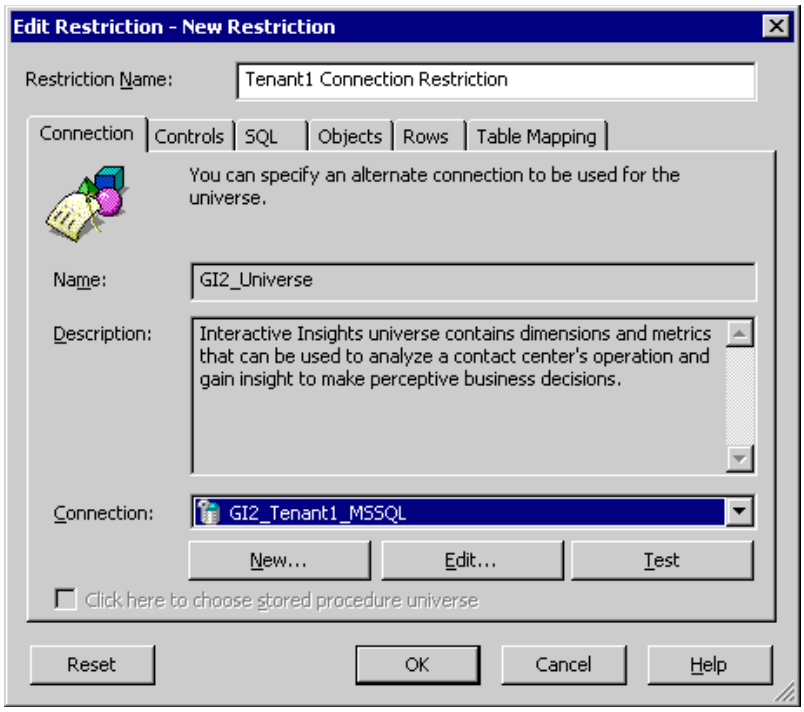


Figure 19: Creating a Connection Restriction for Tenant1

6. Repeat Steps 2 through 4 for each connection restriction that you want to define.

   Tip: Because the `Manage Access Restrictions` dialog box does not have an `Apply` button, you might want to save your changes periodically by closing the dialog box (clicking `Ok`) and reopening it, especially if you have several restrictions to define.

7. Under the `Available groups and users` frame of the `Manage Access Restrictions` dialog box, click `Add user or group` to open the `Select Users and Groups` dialog box.

8. From the `Available groups and users` frame, select all of the users whose access to this universe you want to restrict, and move them to the `Selected groups and users` frame. Click `OK`.

9. One by one, assign the available restrictions that you created to the appropriate group and/or user.

10. Click `Ok` to save your changes, and close the `Manage Access Restrictions` dialog box.

11. Within CMC from the `Users and Groups` section, grant `View on Demand` access for your group to the default connection.

Creating Other Types of Restrictions

There are other types of restrictions that you can set within Designer. Read more about restrictions in the "Managing Universes" chapter of the *BusinessObjects Enterprise XI 3.1 Universe Designer* guide.

Customizing Measure Definitions

Genesys supports limited customization of the following GI2 for GIM measures:

- In the `Activity` class:
  - `Avg Handle Time`
  - `Handle Time`
- In the `Business Attribute` class
  - `% First Response Time Service Level`
- In the `Queue` class:
  - `% Accepted`
  - `Avg Handle Time`
  - `Handle Time`
- In the `Summarized State` class
  - `% Occupancy`

You can redefine these measures within Designer as prescribed in the *Genesys Interactive Insights 8.0 Universe Guide*. Please review the *Genesys Interactive Insights 8.0 User's Guide* for information about how to customize measures. These alternate definitions are available also when you view a measure's properties within Designer.

After you have customized measure definitions, export the universe back to the BusinessObjects repository by following the steps on page 54.

Chapter

5 Migrating Interactive Insights

In this release, the scope of migrating Interactive Insights is limited to the migration of custom reports that were created in a prior Interactive Insights release. These reports must employ the supported measures or their supported alternate definitions and these measures must still be supported in the current release. This release does not support migration or upgrade of the Interactive Insights universe itself; to use the latest universe, you must install it anew. Instead, the latest release supports the coexistence of different releases of universes and reports within the same BOE repository.

You do not need to uninstall and install BOE XI 3.1 software. You must, however, uninstall the prior instance of Interactive Insights to install and use the latest release.

This chapter includes the following sections:

- Interoperability of Software Components, page 69
- Summary of GI2_Universe Changes, page 70
- Organizing BOE Folders, page 70
- Linking the Most Recent Universe to Your Custom Reports, page 73

Interoperability of Software Components

Interactive Insights comprises many components; all of them should be in sync, for optimal report operation. Table 3 shows the mix of the minimum required version of each software component for complete functionality of all of the reports that were offered since the initial Interactive Insights 7.6 release:

Table 3: Software Versions of Interactive Insights Components

Interactive Insights Release	BOE XI Release	GIM Release (Schema)	iWD Data Mart (Schema)
7.6.0	3.0 (12.0)	7.6.001.07 (7.6.000.09)	N/A
7.6.001	3.0 + Hot Fix (12.0)	7.6.001.07	N/A
7.6.1	3.1 (12.1)	7.6.003.05	N/A
7.6.2	3.1 (12.1) Fix Pack 1.8	7.6.005.11 (7.6.005.00)	N/A
8.0.0	3.1 (12.1) Service Pack 3	8.0.000.73	N/A
8.0.001.03	3.1 (12.1) Service Pack 3	8.0.001.05	N/A
8.0.001.06	3.1 (12.1) Service Pack 3	N/A	8.0.002.08
8.0.100+	3.1 (12.1) Service Pack 3	8.0.100+	N/A

Summary of GI2_Universe Changes

Substantial universe changes were made in the initial 8.0 release to support new reports and expand the scope of inbound voice measures that were predominant in the 7.6.*x* releases to include measurements for internal and outbound interactions, as well as chat and e-mail interactions. Refer to the *Genesys Interactive Insights 8.0 Universe Guide* for a complete listing and definitions of all measures.

Given that the universe is continuously evolving, the custom reports that you create by using one release of Interactive Insights might yield different results if you run these reports with a different release of the Interactive Insights universe. You should confirm that all of the measures in your custom reports are still supported in the latest release of the universe. Because the name of a measure includes the class to which it belongs, this includes confirmation of class existence.

Organizing BOE Folders

Beginning with release 7.6.2, Interactive Insights supports the coexistence of multiple releases of the Interactive Insights universes and reports within the BOE repository (but only one installation of Interactive Insights per host). Both are stored in release-specific subfolders of the Interactive Insights root folder. Prior to 7.6.2, the Interactive Insights universe was stored in the `Universes` root folder of the BOE repository and the reports were stored in the

Interactive Insights root folder. If you are not installing Interactive Insights for the first time and you want to maintain more than the current Interactive Insights universe and reports, then, for better organization, Genesys recommends that you restructure CMC folders to relocate prior universes and reports into release-specific subfolders. This reorganization is not required for Genesys Interactive Insights for iWD.

Reorganizing Report Folders

You use CMC to create and relocate report folders. For instance, to reorganize the report folders for the 7.6.1 release:

1. Open CMC and select `Folders`.
2. Navigate to the Interactive Insights root folder and create a new subfolder that is named `7.6.1`.

   `Note:` The aforementioned name is only a suggestion.

3. Select the `Agents` folder and relocate it under the `7.6.1` folder:
   a. Right-click the folder, and then select `Organize > Move To`.
   b. Navigate to the `7.6.1` folder, move it to the `Destinations` box, and click `Move`.
4. Repeat Step 3 for the `Business Results`, `Documentation`, and `Queues` folders.
5. If your repository holds reports from the initial 7.6.0 release, repeat Steps 2 through 4 to organize the reports that are offered with this release.
6. Back up your changes by exporting the repository—for example, to a BIAR file.

Figure 20 shows one suggestion for the reorganization of report folders.

Reorganizing Universe Folders

To reorganize the universe folders for the 7.6.1 release:

1. Open CMC, and select `Universes`.
2. Navigate to the Interactive Insights folder, and create a new subfolder that is named `7.6.1`.

   `Note:` The aforementioned name is only a suggestion.

3. Select `GI2_Universe` at the root level and relocate it under the `7.6.1` folder:
   a. Right-click the universe, and then select `Organize > Move To`.
   b. Navigate to the `7.6.1` folder, move it to the `Destinations` box, and click `Move`.
4. Back up your changes by exporting the repository—for example, to a BIAR file.

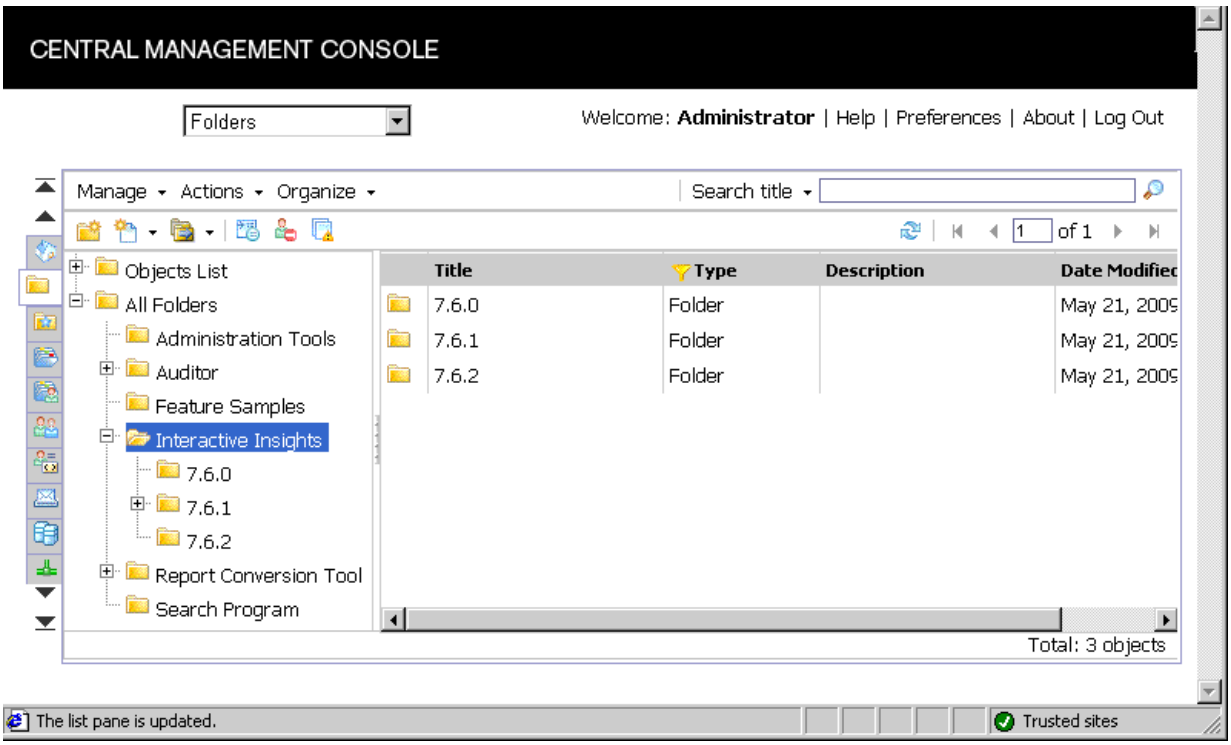


Figure 20: Reorganizing Report Folders into Release-Specific Subfolders

Figure 21 shows one suggestion for the reorganization of universe folders.

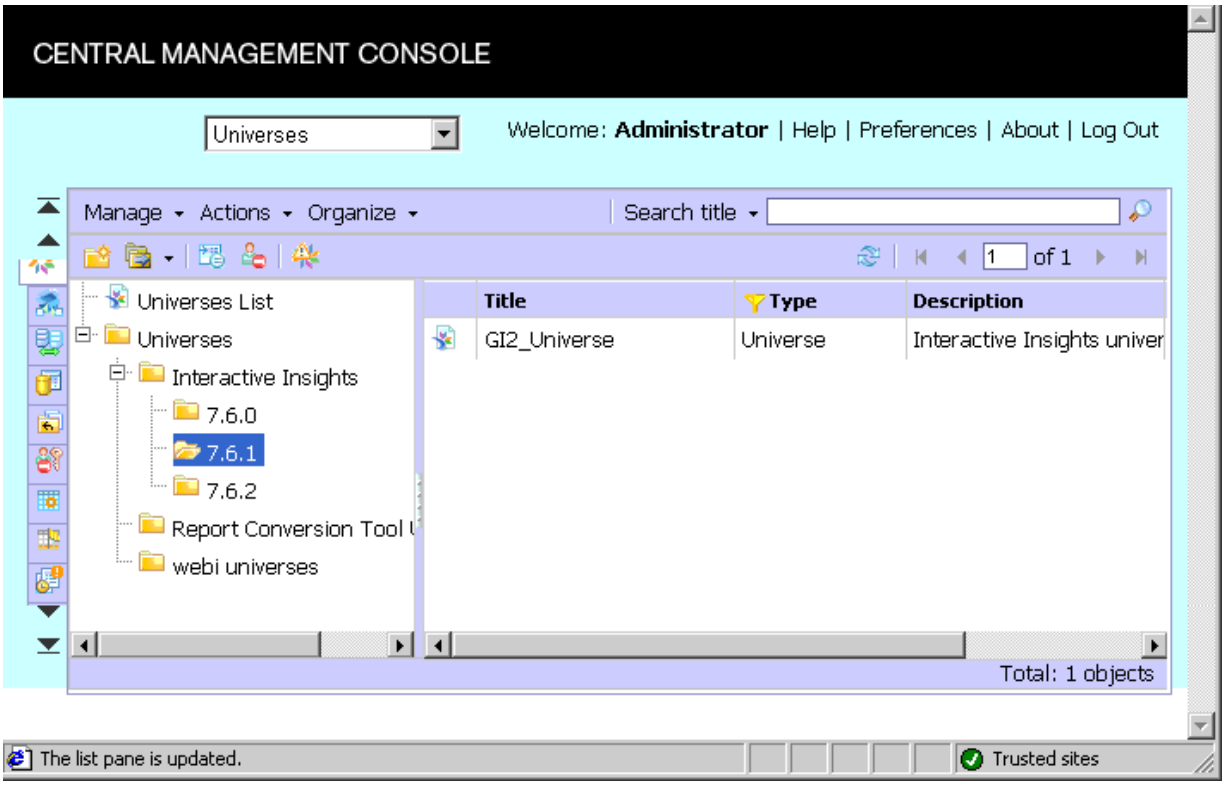


Figure 21: Reorganizing Universe Folders into Release-Specific Subfolders

Linking the Most Recent Universe to Your Custom Reports

The procedure for migrating custom reports that were designed by using a prior release of Interactive Insights to the 8.*x* release consists of two-steps:

- Rename report measures to the names that were used in the latest universe.
- Link the report to the latest universe.

Running the upgrade utility accomplishes the first step. This utility is described in the "Upgrading Interactive Insights Reports" chapter of the *Genesys Interactive Insights 8.0 User's Guide.* The second step requires that you manually link the associated universe for each report to point to the new universe. This is accomplished within Web Intelligence and is described in the following procedure.

1. Open your custom report in Edit mode.
2. Click `Edit Query`, and then select the `Properties` tab, as shown in Figure 22:

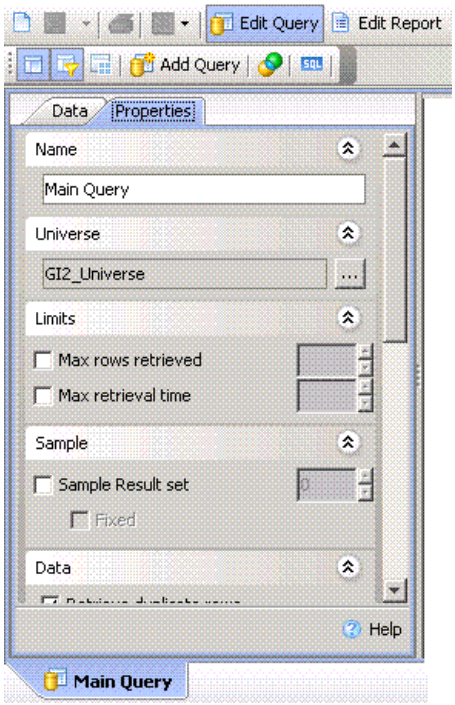


Figure 22: Properties Tab of a Report's Main Query

3. To the right of the universe name, click the three dots to open the `Universe` dialog box, which is shown in Figure 23.

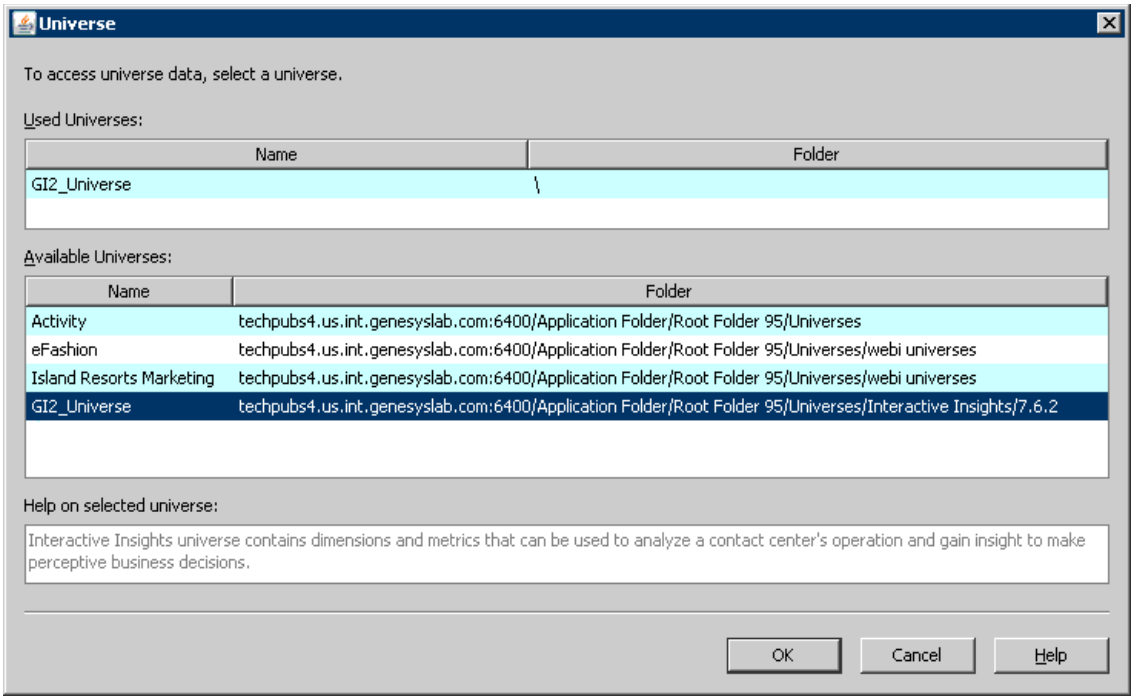


Figure 23: Universe Dialog Box

Tip: You can expand the width of the `Universe` dialog box to view the full path.

4. Select the desired universe from the appropriate release-specific subfolder of Interactive Insights.

   Note: Each release of Interactive Insights names the Interactive Insights universe identically: either `GI2_Universe` or `iWD_universe`. You can distinguish the universe of one release from another by the folder in which it is stored.

5. At the `Change Source` dialog box, shown in Figure 24, click `OK` to have Business Objects map target objects to source objects.

   Under some circumstances, you will need to map a measure that existed from a prior release to a completely new measure in the current release. Such is the case, for example, for customizations that you might have made to the `Agent Inbound Call Handling VQ Report` that was released with the initial Interactive Insights 7.6.0 release. The `...by VQ` measures were subsequently discontinued and replaced by other measures. Measure descriptions in the *Genesys Interactive Insights 8.0 Universe Guide* include the name(s) that you used in prior releases if they differ from the current release.

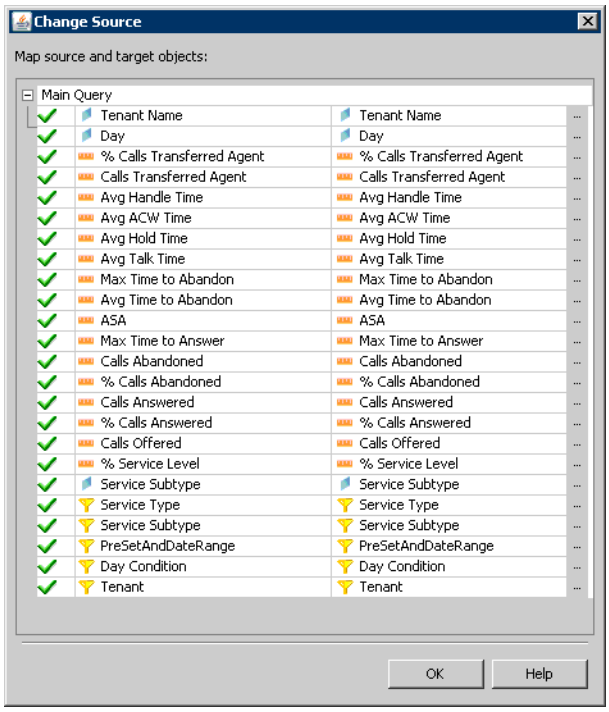


Figure 24: Change Source Dialog Box

6. Save the report and refresh its data.
7. Repeat these steps for each of the reports that you customized.

Checking Universe Relationships

To check that none of your custom reports are still associated with the prior universe, use the `Check Relationships` tool that is provided within the BOE Central Management Console.

1. From CMC, select `Universes`, and navigate to the universe from which you migrated.
2. Right-click the Interactive Insights universe (for example, `GI2_Universe`) From the context menu that appears, select `Tools > Check Relationships`.

   Business Objects displays the object relationships that are associated with the selected universe, including the immediate folder that is storing it, all defined connections from the universe to the data mart, and any reports that access data via universe elements. Figure 25 illustrates a resultant screen that shows six reports that are still tied to the universe. If any custom reports remain among the listing, migrate them to the newer universe, as previously described.

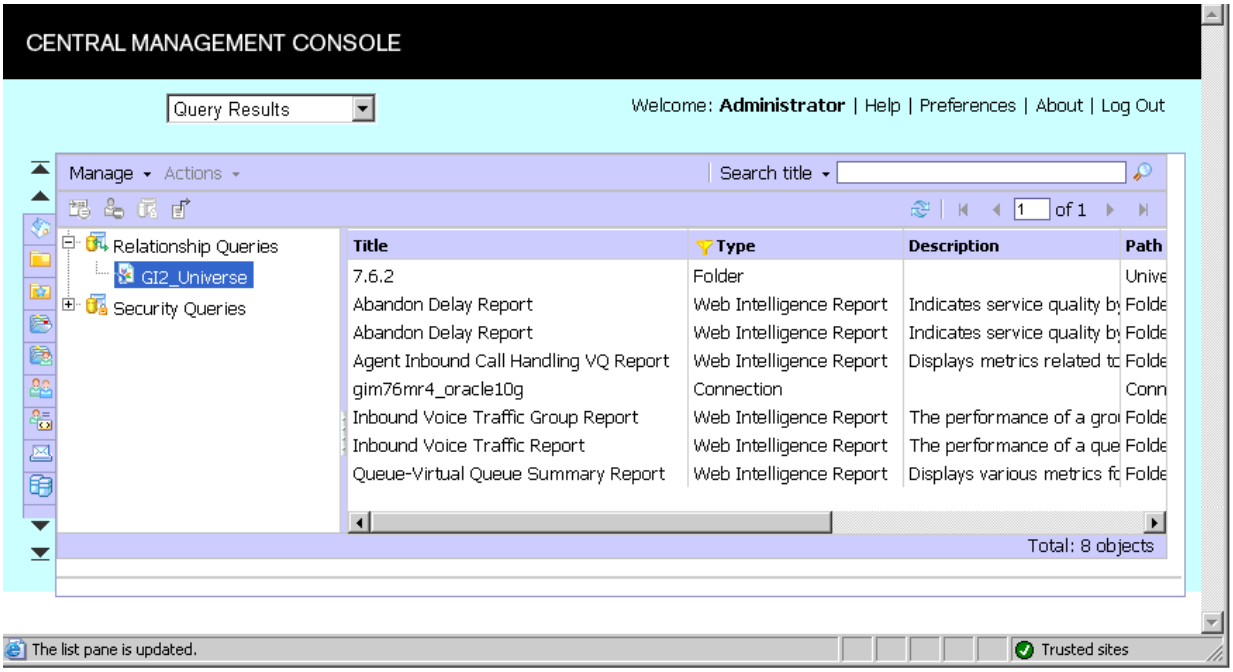


Figure 25: Object Relationships to the Universe

Chapter

6 Accessing Interactive Insights Components

The Interactive Insights reports are accessed through the InfoView and Web Intelligence web-based applications. The Interactive Insights universe is accessed through Designer. This chapter describes how to access these applications:

- Checking Web Server Status, page 77
- Accessing the Central Management Console, page 78
- Accessing InfoView, page 78
- Accessing Web Intelligence, page 79
- Accessing Designer, page 79

Please refer to the Business Objects documentation set for information about how to use these applications.

Checking Web Server Status

The Tomcat, or other Web server, must be running in order to use the Central Management Console (CMC), InfoView, and Web Intelligence applications. If you find that you cannot start these applications, within the Central Configuration Manager (CCM), check whether the web server is running. Figure 26, for example, shows a downed Tomcat server. Right-click the name of the server to restart it.

CCM is accessible only from Windows platforms. To open CCM, at the `Start` menu, select `Central Configuration Manager` from the program folder where BOE XI 3.1 was deployed. The default location of this folder is:

`Programs` > `BusinessObjects XI 3.1` > `BusinessObjects Enterprise`

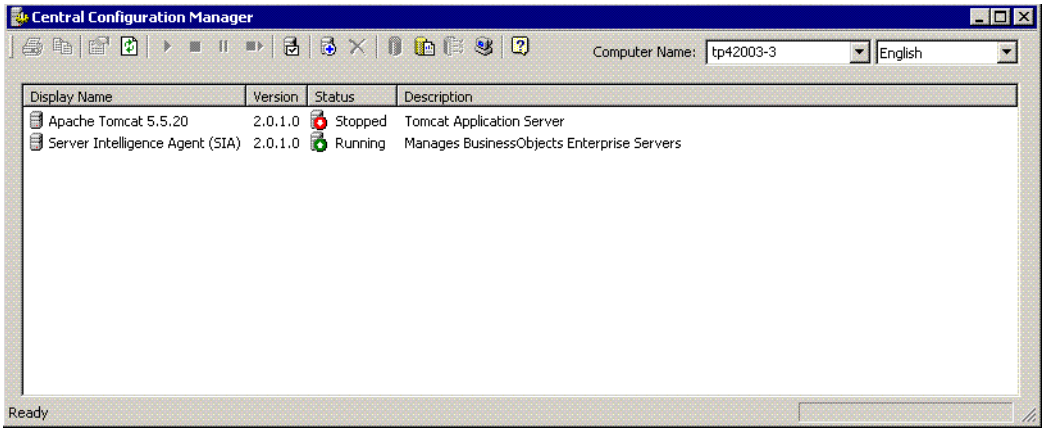


Figure 26: Checking Web Server Status via Central Configuration Manager

Accessing the Central Management Console

Business Objects supports use of the Central Management Console in several browsers, including Microsoft Internet Explorer and Firefox. You will need the name of the Web server that has been established by your administrator to start this application or the complete URL if your administrator configures other than the default parameters and path. Also, you will need to know the connectivity parameters of the account authorized to use CMC. The default path of this application is the following:

`http://webserver:8080/CmcApp/logon.faces`

Refer to the "Getting Started" chapter in the *BusinessObjects Enterprise Central Management Console User's Guide* for additional information.

Accessing InfoView

InfoView is supported for use in several browsers, including Microsoft Internet Explorer and Firefox. You will need the name of the Web server that has been established by your administrator to start this application or the complete URL if your administrator configures other than the default parameters and path. Also, you will need to know the connectivity parameters for a user account. The default path is the following:

`http://webserver:8080/InfoViewApp/logon.jsp`

Refer to the "Getting Started" chapter in the *BusinessObjects Enterprise XI 3.1 InfoView User's Guide* for additional information.

Accessing Web Intelligence

Web Intelligence is invoked when you select to run, view, or modify a report during an InfoView session. In addition to the functionality that is provided by InfoView, Web Intelligence enables you to drill up/down, respond to user prompts, and edit queries. Refer to the "Getting Up and Running" chapter in the *Building Reports Using the Web Intelligence HTML Report Panel* or the *Building Reports Using the Web Intelligence Java Report Panel* for additional information.

Accessing Designer

Use Designer to view the definitions of universe elements, customize measures, and create and assign Info Mart or iWD Data Mart connections for report users. To open Designer on Windows platforms, from the `Start` menu, select `Designer` in the program folder from which BOE XI 3.1 was deployed. The default location of this folder is the following:

`Programs` > `BusinessObjects XI 3.1` > `BusinessObjects Enterprise`

Refer to the "Doing Basic Operations" chapter in the *BusinessObjects Enterprise XI 3.1 Designer's Guide* for information on how to use this application.

Chapter

7 Uninstalling Interactive Insights

The setup file that is deployed with Interactive Insights uninstalls this application by deleting the majority of files that are deployed during Interactive Insights installation and the application instance from the Microsoft Windows registry. This wizard-driven utility, however, does not remove all traces of Interactive Insights from your computer—deleting neither the Interactive Insights universe nor the Interactive Insights reports. Additional manual cleanup is required to finish the task, if this is the course of action that you choose to take.

This chapter guides you through the steps that you must perform to uninstall Interactive Insights completely. It contains the following sections:

- The Interactive Insights Uninstall Routine, page 81
- Additional Manual Steps to Finish the Uninstall, page 82
- Uninstalling the Supporting Applications and Data, page 83

The Interactive Insights Uninstall Routine

You can uninstall Interactive Insights from the setup file that is provided in the installation package or by using the `Add/Remove Programs` utility that is assessed from the Windows Control Panel.

From Installation Maintenance

1. From the Interactive Insights installation package, double-click the `setup.exe` file.
2. From the `Welcome` page, click `Remove`.

From the Control Panel

1. Select and open `Add/Remove Programs`.
2. Select the appropriate Interactive Insights application:
   - **GI2 for GIM:** `Genesys Interactive Insights 8.0`
   - **GI2 for iWD:** `Genesys Interactive Insights for iWD 8.0`

3. Click `Add/Remove`.

This routine deletes all of the *deployed* files in the Interactive Insights directory and the program instance in the Microsoft Windows registry. Any additional files that have been placed in this directory after initial deployment, such as the generated `deploy_unv_rep.log` file and any personal files, remain. Next, perform the additional steps that are listed in the following section to complete the uninstall.

Additional Manual Steps to Finish the Uninstall

After removing the Interactive Insights application, perform each of the following steps to complete the uninstallation of Interactive Insights:

1. In the directory in which Interactive Insights is installed, delete the installation's log file (`gi2_deploy_unv_rep.log`).
2. Delete the Interactive Insights directory itself. The default location of this directory depends on which Interactive Insights product you have installed, whether either of the following:
   - `C:\Program Files\GCTI\Genesys Interactive Insights`
   - `C:\Program Files\GCTI\Genesys Interactive Insights for iWD.`
3. Open the Central Management Console, and delete the following objects from the Business Objects repository:
   - The Interactive Insights universe, whether either of the following:
     - `GI2_Universe`
     - `iWD_Universe`

     This action deletes any custom measures that you might have created as well as those that are provided by Genesys.
   - The Interactive Insights folder, whether either of the following:
     - `Genesys Interactive Insights`
     - `Genesys Interactive Insights for iWD`

     This action deletes all subfolders and any custom reports that you might have created and stored within this folder as well as those that are provided by Genesys.
   - The Genesys-provided database connection, whether either of the following:
     - `GI2_GIM_DB`
     - `GI2_iWD_DB`
   - The Interactive Insights user groups, if you created these manually. Note that this action does not delete the users that are assigned to the groups:
     - `Interactive Insights report developers`

    - `Interactive Insights report editors`
    - `Interactive Insights report viewers`
  - The Interactive Insights users, if you created these manually:
    - `Developer`
    - `Editor`
    - `Viewer`
  - The Interactive Insights access levels, if you created these manually:
    - `Interactive Insights report developer access level`
    - `Interactive Insights report editor access level`
    - `Interactive Insights report viewer access level`

  Refer to the *BusinessObjects Enterprise Central Management Console User's Guide* for information on how to use this application.

4. (Optional) On the computer(s) that was (were) used to import and export the universe, in the Business Objects `universe` directory, delete both of the following:
  - The universe file, whether either of the following:
    - `GI2_universe.unv`
    - `iWD_universe.unv`
  - The universe folder, whether either of the following:
    - `GI2_universe`
    - `iWD_universe`

  The default universe directory is in the following location:

  `C:\Documents and Settings\<user>\Application Data\Business Objects\BusinessObjects Enterprise 12.0\Universes`

These manual steps complete the uninstallation of Interactive Insights from your computer. To go one step further and uninstall the supporting applications and underlying data for Interactive Insights, complete the activities that are listed in the next section.

Uninstalling the Supporting Applications and Data

Genesys Interactive Insights is powered by the applications that are provided with BusinessObjects Enterprise XI 3.1 and the data that is stored in your Genesys Info Mart or iWD Data Mart:

- To uninstall Business Objects Enterprise, refer to the "Uninstalling BusinessObjects Enterprise" chapter in the *BusinessObjects Enterprise XI 3.1 Installation and Configuration Guide for Windows (for UNIX)*.

- To uninstall the aggregation engine that creates and populates the `AG2_*` tables in Info Mart, refer to the "Uninstalling Reporting and Analytics Aggregates" chapter in the *Reporting and Analytics Aggregates 8.0 Deployment Guide.*
- Refer to the Genesys Info Mart documentation set to uninstall Genesys Info Mart.
- Refer to the intelligent Workload Distribution documentation set to uninstall iWD Data Mart.

Chapter

8 Application Files

The Interactive Insights installation routine creates a root folder that contains the Business Intelligence Archive Repository (BIAR) of the Interactive Insights universe and supporting files. If you selected a default location for the installation routine to deploy the Interactive Insights, the root folder is:

- The `C:\Program Files\GCTI\Genesys Interactive Insights` directory on Windows platforms (for GI2 for GIM)
- The `C:\Program Files\GCTI\Genesys Interactive Insights for iWD` directory on Windows platforms (for GI2 for iWD)
- The directory that you specified (Step 8 on page 33) upon installation on UNIX platforms.

Tables 4 through 6 describe the files that make up this folder/directory.

Table 4: Contents of the Root Folder

File Name	Description
`bo_custom_install.bat` (Windows) `bo_custom_install.sh` (UNIX)	When it is executed, script that installs the Genesys-customized version of BusinessObjects Enterprise XI 3.1. **Notes:** • The Interactive Insights installation routine deploys this file even if you select not to install Business Objects. Under such circumstances, to use this script to install BOE, you must edit the script to specify BOE parameters. • Because this file contains the unencrypted password to Central Management Server (CMS), after installation, consider editing it to remove the password, if you are concerned about security.

Table 4: Contents of the Root Folder (Continued)

File Name	Description
`gi2.biar.import.jar`	Java application that is called by other deployed scripts and enables the import of the Interactive Insights universe, reports, folders, users, user groups, and rights. **Note:** This application is reserved for internal use and should not be run directly.
`gi2.upgrade.universe.jar`	Java application that renames report measures from a prior release to the current release. Refer to "Upgrading Interactive Insights Reports" in the *Genesys Interactive Insights 8.0 User's Guide* for information about this utility. **Note:** This application is reserved for internal use and should not be run directly.
`gi2.utils.jar`	Java application that replaces JSP files that are located in the Tomcat directory with Genesys-modified pages, under qualifying circumstances. **Note:** This application is reserved for internal use and should not be run directly.
`gi2_customize_bo.bat` (Windows) `gi2_customize_bo.sh` (UNIX)	Script that customizes the appearance of BOE software with Genesys-specific images and Java Server Pages (JSP) that encompass the Genesys design.
`gi2_deploy_main.bat` (Windows) `gi2_deploy_main.sh` (UNIX)	Script that calls the following scripts: • `gi2_setenv` • `gi2_customize_bo` • `gi2_deploy_unv_rep` • `gi2_deploy_sum`
`gi2_deploy_sum.bat` (Windows) `gi2_deploy_sum.sh` (UNIX)	Script that scans the BOE repository for deployed Interactive Insights objects and compares the scan results with the listing of components that are to be installed. (This listing resides within the `insights.biar` file.) If the scan yields no objects that should be installed, this script returns an error. This script prepares the environment for the `biarImport.jar` application and relies on BOE parameters that are specified in the `gi2_setenv` script.
`gi2_deploy_unv_rep.bat` (Windows) `gi2_deploy_unv_rep.sh` (UNIX)	Script that silently imports the Interactive Insights universe, reports, documentation, and folders into the BOE repository. This script prepares the environment for the `biarImport.jar` application and relies on BOE parameters that are specified in the `gi2_setenv` script.

Table 4: Contents of the Root Folder (Continued)

File Name	Description
`gi2_deploy_unv_rep.log` (Windows & UNIX)	Log file that contains the results of the Interactive Insights installation. This file is generated every time that the `gi2_deploy_unv_rep` script is run.
`gi2_setenv.bat` (Windows) `gi2_setenv.sh` (UNIX)	Script that sets BOE environment variables for connection to the BOE repository, based on values that you specified during Interactive Insights installation or that you supply manually. Other scripts rely on the contents of this script to connect to the BOE repository. **Note:** Because this file contains the unencrypted password to CMS, after installation, consider editing it to remove the password, if you are concerned about security.
`gi2_upgrade_universe.bat` (Windows) `gi2_upgrade_universe.sh` (UNIX)	Script that calls the `gi2.upgrade.universe` utility.
`insights.biar`	BIAR that contains an export of the Genesys Interactive Insights universe, reports, PDF documents, folders, users, groups, and their permissions.
`ip_description.xml`	File that lists the contents of the installation package.
`read_me.html`	File that contains general information about the installation package.
`agg`	Subfolder that contains files that support the Reporting and Analytics Aggregates (RAA) component of Genesys Info Mart. Refer to the "Application Files" chapter in the *Reporting and Analytics Aggregates 8.0 Deployment Guide* for the description of files in this folder. This subfolder is not deployed for GI2 for iWD.
`conf`	Subfolder that contains the `log4j` and `gi2.json` files. See Table 5.
`res`	Subfolder that contains the Genesys logos that are displayed on the CMC and InfoView login screens and JSPs.
`sql_scripts`	Subfolder that contains three subfolders that hold SQL scripts for each of the supported RDBMS types. The four subfolders are named as follows: • `db2` (Not used in the 8.0.0 and 8.0.1 releases which do not support operation on DB2 platforms.) • `oracle` • `mssql` • `mysql` (iWD only) See Table 6 for the contents of each subfolder.

Table 5: Contents of the conf Subfolder

File Name	Description
`diff.json`	File that the upgrade utility references to rename report measures. This file is not used for GI2 for iWD.
`gi2.json`	Configuration file for the `biar import` utility that checks for existing objects.
`log4j.properties`	Configuration file of logging parameters for the `biar import` utility.

Table 6: Contents of the sql_scripts/[dbtype] Subfolder

File Name	Description
`make_gi2.sql`	SQL script that contains database objects for Interactive Insights operation. For GI2 for GIM, the aggregation engine—when it is first run—silently executes this script against your Genesys Info Mart database. See "Utility Views Specific to Interactive Insights" on page 49 for additional information. For GI2 for iWD, you must run this script manually. See "Manually Running the make_gi2.sql Script" on page 49 for additional information.

Related Documentation Resources

The following resources provide additional information that is relevant to this software. Consult these additional resources, as necessary.

BusinessObjects Enterprise XI 3.1

- The Business Objects documentation set, including the following manuals*:
  - *BusinessObjects Enterprise XI 3.1 Deployment Planning Guide*
  - *BusinessObjects Enterprise XI 3.1 Installation Guide for Windows (for UNIX)*, which describes, in detail, how to install BOE components
  - *Business Objects Enterprise XI 3.1 for AIX – Supported Platform*
  - *Business Objects Enterprise XI 3.1 for HPUX – Supported Platform*
  - *Business Objects Enterprise XI 3.1 for Linux – Supported Platform*
  - *Business Objects Enterprise XI 3.1 for Solaris – Supported Platform*
  - *Business Objects Enterprise XI 3.1 for Windows – Supported Platform*
  - *BusinessObjects Enterprise Administrator's Guide*
  - *BusinessObjects Enterprise XI 3.1 Server Administration Guide*
  - *BusinessObjects Enterprise Central Management Console User's Guide*
  - *BusinessObjects Enterprise XI 3.1 Publisher's Guide*
  - *BusinessObjects Enterprise 5/6 to XI 3.1 Migration Guide*
  - *BusinessObjects Enterprise Upgrade Guide*
  - *BusinessObjects Enterprise InfoView User's Guide*
  - *BusinessObjects Enterprise XI 3.1 Building Reports Using the HTML Report Panel*

* Genesys believes that some Business Objects documents that were available as of the publication of this *Genesys Interactive Insights 8.0 Deployment Guide* were mistitled. The references that we provide to such documents use the intended titles.

- *BusinessObjects Enterprise XI 3.1 Building Reports Using the Java Report Panel*
- *Performing On-Report Analysis with Web Intelligence*
- *Building Queries with Web Intelligence Query—HTML*
- *BusinessObjects Enterprise XI 3.1 Universe Designer*

The complete set of BusinessObjects Enterprise (BOE) XI, 3.1 documentation is available, for customers who obtained BOE from Genesys, through the following URL:

```
http://service.sap.com/sap/bc/bsp/spn/oem_portal/infouser_
request.htm?pid=0000279980&code=574DA18E763BA5920D1769FC17946653
&dstamp=20090604
```

It is also available on the separate Genesys Interactive Insights – Platform Components – Documentation DVD.

`Note:` Many documents on this website are available only to direct SAP customers.

Genesys Interactive Insights

- *Genesys Interactive Insights 8.0 Universe Guide,* which describes, in detail, the reports and measures that are provided in the Genesys Interactive Insights release
- *Genesys Interactive Insights 8.0 User's Guide,* which summarizes how to operate Interactive Insights reports by using InfoView and provides basic instruction for customizing your own reports

Genesys Info Mart

- The Genesys Info Mart 8.0 documentation set, including the following manuals:
  - *Genesys Info Mart 8.0 Reference Manual* for your particular RDBMS type, for table and field descriptions of the Info Mart
  - *Genesys Info Mart 8.0 Deployment Guide,* which will help you configure and install Genesys Info Mart 8.0

Intelligent Workload Distribution

- The intelligent Workload Distribution 8.0 documentation set, including the following manuals:
  - *intelligent Workload Distribution 8.0 Data Mart Reference Guide,* for table and field descriptions of the iWD Data Mart
  - *intelligent Workload Distribution 8.0 Deployment Guide,* which will help you configure and install iWD 8.0

Reporting and Analytics Aggregates

- *Reporting and Analytics Aggregates 8.0 Deployment Guide,* which describes how to deploy this option of Genesys Info Mart
- *Reporting and Analytics Aggregates 8.0 Reference Manual,* which describes the aggregate subject areas, tables, and columns

Genesys

- *Genesys Technical Publications Glossary,* which ships on the Genesys Documentation Library DVD and provides a comprehensive list of the Genesys and computer-telephony integration (CTI) terminology and acronyms that are used in this document.
- *Genesys Migration Guide*, which ships on the Genesys Documentation Library DVD, and provides documented migration strategies for Genesys product releases. Contact Genesys Technical Support for more information.
- Release Notes and Product Advisories for this product, which are available on the Genesys Technical Support website at `http://genesyslab.com/support`.

Information about supported hardware and third-party software is available on the Genesys Technical Support website in the following documents:

- *Genesys Supported Operating Environment Reference Manual*
- *Genesys Supported Media Interfaces Reference Manual*
- *Genesys Hardware Sizing Guide,* which provides information about Genesys hardware sizing guidelines for the Genesys 8.*x* releases.

For additional system-wide planning tools and information, see the release-specific listings of System Level Documents on the Genesys Technical Support website, accessible from the `system level documents by release` tab in the Knowledge Base `Browse Documents` Section.

Genesys product documentation is available on the:

- Genesys Technical Support website at `http://genesyslab.com/support`.
- Genesys Documentation Library DVD, which you can order by e-mail from Genesys Order Management at `orderman@genesyslab.com`.

Document Conventions

This document uses certain stylistic and typographical conventions—introduced here—that serve as shorthands for particular kinds of information.

Document Version Number

A version number appears at the bottom of the inside front cover of this document. Version numbers change as new information is added to this document. The following is a sample version number:

80ii_dep_03-2011_v8.0.101.00

You will need this number when you are talking with Genesys Technical Support about this product.

Screen Captures Used in This Document

Screen captures from the product graphical user interface (GUI), as used in this document, may sometimes contain minor spelling, capitalization, or grammatical errors. The text that accompanies and explains the screen captures corrects such errors *except* when such a correction would prevent you from installing, configuring, or successfully using the product. For example, if the name of an option contains a usage error, the name would be presented exactly as it appears in the product GUI; the error would not be corrected in any accompanying text.

Type Styles

Table 7 describes and illustrates the type conventions that are used in this document.

Table 7: Type Styles

Type Style	Used For	Examples
Italic	• Document titles • Emphasis • Definitions of (or first references to) unfamiliar terms • Mathematical variables Used also to indicate placeholder text within code samples or commands, in the special case in which angle brackets are a required part of the syntax (see the note about angle brackets on page 93).	Please consult the *Genesys Migration Guide* for more information. Do *not* use this value for this option. A *customary and usual* practice is one that is widely accepted and used within a particular industry or profession. The formula $x + 1 = 7$, where x stands for . . .

Table 7: Type Styles (Continued)

Type Style	Used For	Examples
Monospace font (Looks like `teletype` or `typewriter text`)	All programming identifiers and GUI elements. This convention includes: • The *names* of directories, files, folders, configuration objects, paths, scripts, dialog boxes, options, fields, text and list boxes, operational modes, all buttons (including radio buttons), check boxes, commands, tabs, CTI events, and error messages. • The values of options. • Logical arguments and command syntax. • Code samples. Used also for any text that users must manually enter during a configuration or installation procedure, or on a command line.	Select the `Show variables on screen` check box. In the `Operand` text box, enter your formula. Click `OK` to exit the `Properties` dialog box. T-Server distributes the error messages in `EventError` events. If you select `true` for the `inbound-bsns-calls` option, all established inbound calls on a local agent are considered business calls. Enter `exit` on the command line.
Square brackets ([ ])	A particular parameter or value that is optional within a logical argument, a command, or some programming syntax. That is, the presence of the parameter or value is not required to resolve the argument, command, or block of code. The user decides whether to include this optional information.	`smcp_server -host [/flags]`
Angle brackets (< >)	A placeholder for a value that the user must specify. This might be a DN or a port number that is specific to your enterprise. **Note:** In some cases, angle brackets are required characters in code syntax (for example, in XML schemas). In these cases, italic text is used for placeholder values.	`smcp_server -host <confighost>`

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