

Genesys Decisions

Genesys Decisions
IT Administration Guide 8.5

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Chapter 1: Introduction

In this chapter

- Section 1: Decisions Overview
- Section 2: Getting Started

Section 1: Decisions Overview

Decisions is a multi-user what-if analysis staff planning and budget planning system for contact center networks. With Decisions, users will quickly and accurately develop weekly, monthly, annual and multi-year planning scenarios. Each scenario delivers:

- Forecasts of key drivers (e.g., contact volume, handle time, shrinkage)
- Weekly and monthly hiring, overtime and leave plans
- Weekly and monthly ASA, abandon rate, occupancy and service level predictions
- Detailed budgeting and variable labour cost variance analysis

Section 2: Getting Started

This Section summarizes the requirements, etc. needed for installing the Decisions applications and Data Mart.

- About this guide
- Release and installation documentation
- Decisions Support
- Decisions Upgrades

About this guide

This guide is intended for system administrators, network engineers, and others who plan to install the Decisions Admin application, User application and Data Mart. It includes the pre-requisites, installation, and post-installation procedures necessary for a successful installation of Decisions.

Release and installation documentation

Before you begin a new installation, we strongly recommend that you read the following release and installation documentation included in the release package and/or online. Requirements for the networking, database server, client workstations, and services must be met before the installation of the Decisions software.

Release Package

The Decisions Release package includes the following:

- Client application installation

- Database deployer executable
- Data bus Installation executable
- Data Dictionary
- Release Notes
- IT Admin Guide
- Installation Instructions

Chapter 2: Pre-Installation Procedures

In this chapter:

- Section 3: Hardware and Software Requirements
- Section 4: Architecture
- Section 5: Security
- Section 6: Import File Location

Section 3: Hardware and Software Requirements

In this Section

- Client PC Requirements
- Server Requirements
- Storage Requirements
- Database Requirements
- Networking Communications
- Data Bus

Client PC Requirements

- 6 processor cores recommended; 4 processor cores required
 - 2.0 GHz processor speed or greater
- 200 Mb free disk space
- 4 GB system memory required
- Windows Vista, 7, 8 or 10 (x86 or x64)
- .NET Framework Version 4.5 or above
- Client Applications run on a desktop (Physical or Virtual)

Server Requirements

Demand and storage requirements are largely dependent on after-deployment configuration of the product. The following specifications are based on a future-proof recommended configuration. We try to be accommodating of existing IT infrastructure and support a lot of different configurations, so the configurations below are not minimum requirements and are therefore flexible.

Notes:

- Recommended backups are not included
- We will support older Windows Server (back to Server 2008)/MSSQL version (back to SQL Server 2008) for either deployment
- OLTP – The database used for Decisions transactions. Serves the Decisions User and Admin applications.
Data Mart – Reporting database.

Config 1 – Both OLTP and Data Mart on same server with Data Bus service

SQL Database server

- Windows Server 2012 R2 (or above)
- MS SQL 2012 SP2 (or above)
- 4 CPU
- 16 GB RAM
- Binaries – 5 GB required for Data Bus service (mostly room for logs)
- Data - 100 GB
- Logs - 20 GB– Flexible depending on your SQL Server policies

Config 2- Separate OLTP and Data Mart servers

SQL Database server – Decisions OLTP

- Windows Server 2012 R2 (or above)
- MS SQL 2012 SP2 (or above)
- 2 CPU
- 8 GB RAM
- Binaries – No additional storage requirement
- Data - 50 GB
- Logs - 10 GB – Flexible depending on your SQL Server policies

SQL Database server – Decisions Data Mart with Data Bus service

- Windows Server 2012 R2 (or above)
- MS SQL 2012 SP2 (or above)
- 2-4 CPU
- 16 GB RAM
- Binaries – 5 GB required for Data Bus service (mostly room for logs)
- Data - 50 GB
- Logs - 10 GB– Flexible depending on your SQL Server policies

Storage Requirements

- Decisions database
 - resides on a SQL server
 - initially 2 GB in size and grows in the order of hundreds MB per year
- Decisions scenarios
 - resides on a file share
 - roughly 20 MB
- Historical data files
 - resides on a file share

- roughly 10-20 MB per week

Database Requirements

This section discusses the databases supported in Decisions and provides database server requirements, installation and maintenance.

This section discusses the following topics:

- Overview
- Decisions database
- Decisions Data Mart database
- SQL Server
- Mixed Authentication Mode
- Backup Requirements

Overview

- An install package will be supplied which will deploy/upgrade the Decisions and the Decisions Data Mart Databases on the selected server(s)
- Decisions Database resides in a Microsoft SQL Server instance
- Decisions Data Mart database resides in a Microsoft SQL Server instance
- Both databases can be in the same instance

Decisions databases

The Decisions database stores the following:

- configuration and mapping information
- historical data

The Decisions Data Mart database is an open schema that contains the following:

- historical data
- published scenario data

SQL Server

Decisions supports the following Microsoft SQL versions:

Microsoft SQL Server 2005 Standard/ Enterprise SP2
 Microsoft SQL Server 2008 Standard/Enterprise
 Microsoft SQL Server 2008r2 Standard/Enterprise
 Microsoft SQL Server 2012 Standard/Enterprise
 Microsoft SQL Server 2014 Standard/Enterprise
 Microsoft SQL Server 2016 Standard/Enterprise

Notes:

- SQL Server can either be configured for Mixed Authentication mode or Windows Authentication.

Backup Requirements

Normal database backup procedures should be completed as described in your Microsoft SQL Server documentation. Daily backups of the Decisions database and Decisions Data Mart database are recommended with a fourteen (14) day backup file retention.

Network Requirements

The client application needs to communicate with the SQL database server. The appropriate ports need to be opened in the firewall.

For Publishing, the Data Bus needs to be assigned a port which will need to be opened so that the client application can communicate with the Data Bus service. Note: Data Bus service needs to listen for Publication requests. It can be configured to listen on any port. This port will be needed when installing the Decisions Admin/User applications, as well as the Data Bus.

- Decisions users create planning scenario files (*.cbg format) that can be saved locally or on network drives.
- During installation, the option of setting up a nonstandard port for SQL server is available.

Network bandwidth is very low. Upon starting the application, it reads in the configuration information from the database as well as monthly and weekly history back for a maximum of one (1) year. Additionally, when a user wishes to “publish” a scenario to the Data Mart, the application will contact the Data Bus windows service to transfer the data. It transfers weekly and monthly information and the typical scenario length is 12-18 months.

Data Bus Requirements

Data Bus Service Server

- Microsoft Windows 7,8,10, Server 2003, 2008, 2012, or 2012R2

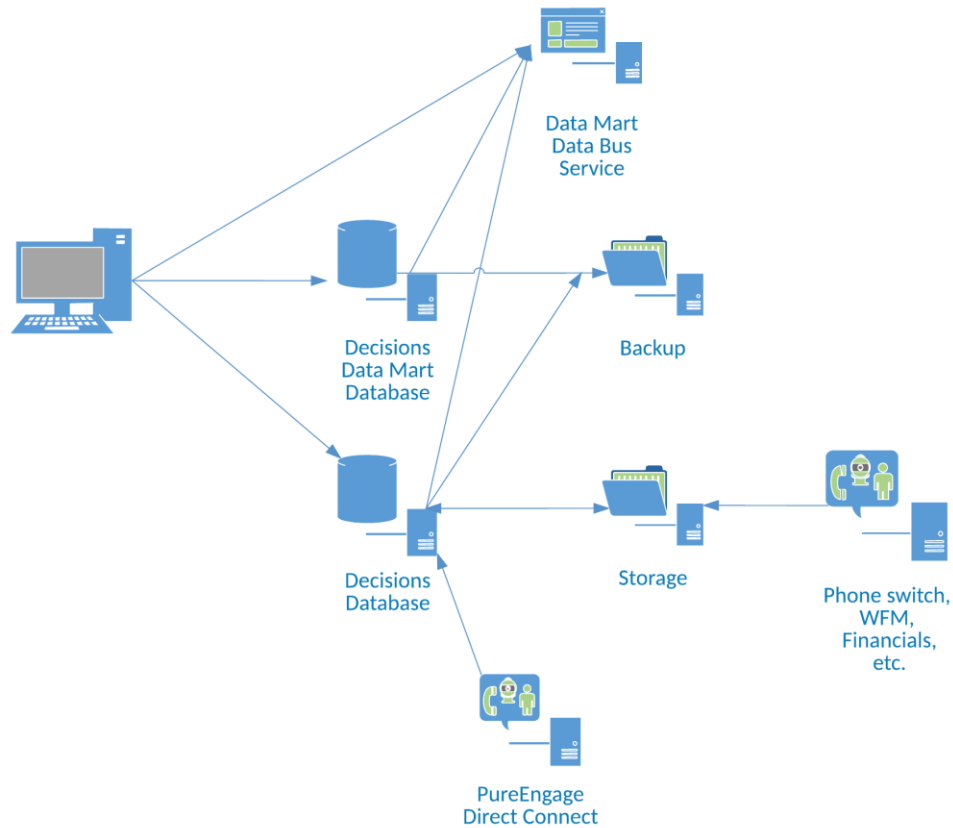
The Data Bus is a service that synchronizes historical data from the Decisions database into the Decisions Data Mart and publishes data from Client application scenarios into the Decisions Data Mart.

The Data Bus can only be configured to write to one Data Mart database so you will need a new install of it for the production instance. Once installed, the Data Bus will synchronize the data from the production Decisions Database into the production Data Mart.

Windows Communication Foundation (WCF) is used to connect to the Data Bus from the Decisions User and Admin applications. There are many combinations of settings available for security around these connections. The default configurations should work for almost all installations

Section 4: Architecture

The following figure illustrates the Genesys Decisions 8.5 architecture and data flow. Deployments can gather historical data from flat files, or through the PureEngage Direct Connect Adapter. For information about the PureEngage Adapter, see [Chapter 5: PureEngage Adapter 8.5](#).



Section 5: Security

This Section describes the requirements that must be fulfilled prior to Decisions installation.

In this Section

- Decisions Security
- Decisions Data Mart Security

Decisions Security

This section discusses the following topics:

- Decisions_Administrators Active Directory Group
- Decisions_Users Active Directory Group
- User management

Decisions_Administrators Active Directory Group

The Decisions_Administrators active directory group contains the users that will be responsible for adding/updating configuration and mapping, building simulation models, managing Data Mart users and importing weekly data. Access to the Admin application should be limited due to changes to the configuration and simulation models impact the outputs in the user application.

- Create an Active Directory group for Decisions_Administrators
 - Add this AD group to the SQL Server as a New Login
 - Set Server role to Public
 - On the User Mapping page, select the checkbox next to the Decisions database
 - Database role membership window, check ctb_admin, db_datareader, db_datawriter, and public
- This group is used in the Database Deploy tool as the AD Group for Admin access

Decisions_Users Active Directory Group

The Decisions_Users active directory group contains the users that generate, maintain and develop what-if plans, and run reports in the user application. Users should understand the configuration to effectively develop and interpret plans.

- Create an Active Directory group for Decisions_Users
- Add this AD group to the SQL Server as a New Login
 - Set Server role to Public
 - On the User Mappings page, select the checkbox next to the Decisions database
 - Database role membership window, make sure that public is the only role that is checked
- This group is used in the Database Deploy tool as the AD Group for User access

User Management

To add a new user to the Decisions applications, the user will need to be added to the appropriate active directory group.

Decisions Data Mart Security

This section discusses the following topics:

- Service account
- Data Mart roles
- Enabling security
- User management

Service Account

- A Service Account is required for the Data Bus log in and must be configured as the owner of the Data Mart database.
 - In Active Directory create a user account to serve as a Service User
 - Password should be set to never expire
 - Service User account must have the rights to start and stop a service
- Administrators and Users will have to have accounts in the SQL Server. These can be individual accounts or Active Directory groups.

Data Mart Roles

There are two roles built into the Decisions Data Mart:

Data Mart Administrators Active Directory Group

- Data Mart Administrators can enable/disable Data Mart Security, give permission to a database user to become a Data Mart user and can grant or revoke permissions to any Folder to any user.
- To be a Data Mart Administrator the SQL user must be assigned the DataMartAdmins database role.
- A user that is only a member of the DataMartAdmins database role does not have access to the actual data inside the Data Mart. A member of the DataMartAdmins database role only has access to those artefacts needed to perform administrative tasks.

Data Mart Users Activity Directory

- Data Mart Users are those people who either need to publish data to the Data Mart from the Decisions application, or report on data from the Data Mart.
- To be a Data Mart User, the SQL user must be assigned the DataMartUsers database role.

Enable Data Mart Advanced Security

Security for the Data Mart can be enabled or disabled by a Data Mart Administrator. Security is disabled by default. Security for the Data Mart can be enabled or disabled by a Data Mart Administrator.

- With Data Mart Security disabled, every user who has the DataMartUsers role can access the data in the Decisions Data Mart.

User Management

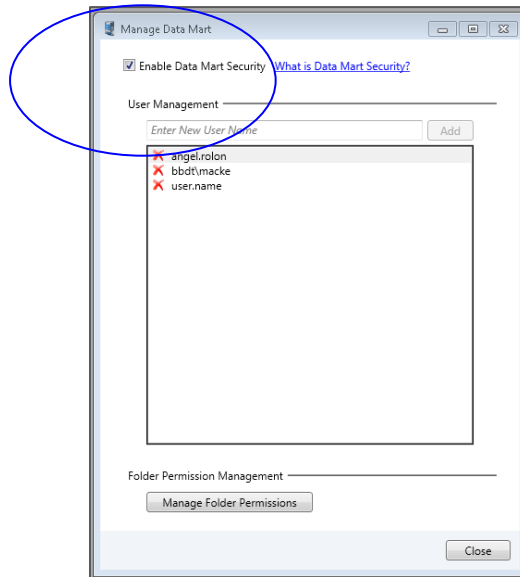
To add a new user to the Decisions Data Mart, the user will need to be added to the appropriate active directory group(s). A user can be a member of the Data Mart Admin and/or the Data Mart User group.

In addition to the active directory group(s), Data Mart users will need to be added to the Data Mart through the Decisions Admin application.

- Publishing scenarios to Data Mart only
 - Add Windows Login, including domain, as the New User Name
- Creating reports using the Data Mart data but not publishing
 - Depending on how the user will access the Data Mart, add Windows Login or SQL Login, including domain, as the New User Name

Add New Data Mart User:

- In the Text Box shown below enter the username of the new user and then click Add.
- The user name that gets entered should be either a Windows login or a SQL login.

**Section 6: Import File Location**

A shared file storage location is needed to put files that are generated from the phone switch, WFM, and other source systems before they are imported into the Decisions database.

Recommended Structure

The Decisions Admin application reads flat files from a file share. The Decisions_Admistrators AD group will need to be able to read from this file share.

Genesys recommends this structure:

- \\Import Files\ACD
- \\Import Files\Shrinkage
- \\Import Files\Staffing
- \\Import Files\Chat
- \\Import Files>Email
- \\Import Files\Casework

Chapter 3: Install Decisions

Requirements for the networking, database server, client workstations, and services must be met before the installation of the Decisions software.

In this chapter:

- Section 7: New Installation Task List
- Section 8: Database Deployments
- Section 9: Data Bus Deployment
- Section 10: Client Installation

Section 7: New Installation Task List

This Section walks through the New Installation Task List. Using the Task List, ensures performance of the required Decisions deployment and installation tasks while taking the necessary considerations into account.

Release Package

1. Download release package ☐ _____
2. Review installation instructions ☐ _____

Server Configuration

Hardware Procurement

1. Database server built to hardware specifications provided ☐ _____
2. Software requirements met including OS, SQL, MS .Net Framework ☐ _____

Import File Directory Structure

1. Create a folder structure to store the import files ☐ _____
2. Share the parent folder with the Decisions Administrators AD group ☐ _____

Active Directory and Application Server Security

Active Directory Group creation

1. Create and populate group for Decisions_Admistrators ☐ _____
2. Create and populate group for Decisions_Users ☐ _____
3. Create and populate a group for Decisions_DataMartAdministrators ☐ _____
4. Create and populate a group for Decisions_DataMartUsers ☐ _____

Service Account Creation for Data Bus

1. In Active Directory create a user account to serve as a **Service User** ☐ _____
2. Set password to never expire ☐ _____
3. Make sure Service User account has rights to start and stop services ☐ _____

*Database (SQL Server) Security**Decisions Administrators Active Directory Group*

1. Server role, select 'bulkadmin' ☐ _____
2. On User mapping page, select the checkbox next to the Decisions database ☐ _____
3. Database role, select db_datareader, db_datawriter, ctb_admin, and public ☐ _____

Decisions Users Active Directory Group

1. Server role, select public ☐ _____
2. On User mapping page, select the checkbox next to the Decisions database ☐ _____
3. Database role, select public ☐ _____

Service Accounts

1. Create SQL service account to run Data Bus service ☐ _____
2. Assign db_owner permission to Data Mart database ☐ _____
3. Assign public permission to Decisions database ☐ _____

Network Communications

1. Port 1433 (standard SQL Server port) - Client PC to database Server ☐ _____
2. Data Bus Publication Port 808 (default, nonstandard is configurable) ☐ _____
3. Port 445 (Between SQL server and file share) ☐ _____

Section 8: Database Deployments

This Section walks you through the step by step instructions related to the deployment of the Decisions database and Data Mart database.

In this Section

- Installation Checklist
- Step 1: Run the database deployer
- Step 2: Enter Decisions database information
- Step 3: Database Configuration
- Step 4: Complete deployment

Installation Checklist

Permissions

1. Individual deploying the Decisions database requires 'dbcreator' permissions on the database server ☐ _____
2. Individual deploying the Data Mart database requires 'serveradmin' permission on the database server ☐ _____

Release Package

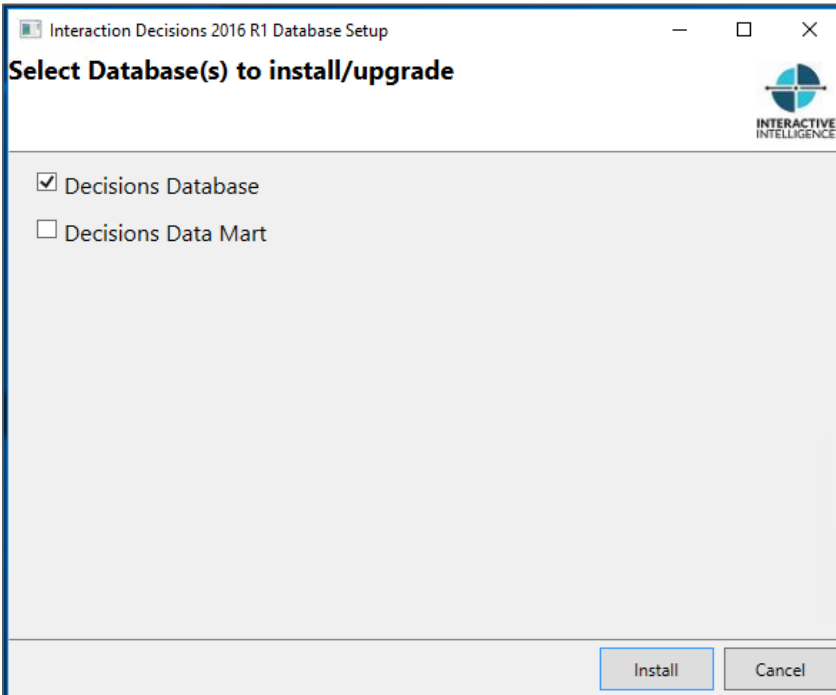
1. Download release package ☐ _____
2. Review installation instructions ☐ _____

Information needed for install

1. Hours per week (FTE)
2. Start day of the planning week
3. Applicable AD groups including Domain
4. Decisions database server and database name

Step 1: Run the database deployer

1. Double click on DecisionsDatabaseDeployer.exe.
2. Select the database to install. The Decisions database is required; the Decisions Data Mart is optional.
3. Click Install



Step 2: Decision Database(s) Information

1. Enter the SQL Server instance name
2. Enter the database name
3. If you select Windows Authentication, it will use the Windows credentials of the logged in user to access the database Server and execute the commands. You have the option to supply a SQL login name and password to perform the operations instead of the Windows login.
4. Click Next

Interaction Decisions 2016 R1 Database Setup

Interaction Decisions Database Information

Provide the required values to access the Interaction Decisions Database.

Server Name:

Database Name:

☒ Windows Authentication
☐ SQL Server Authentication

User Name

Password

Back Next Cancel

Step 2b: Decision Data Mart Information

1. Enter the SQL Server instance name
2. Enter the Data Mart database name
3. If you select Windows Authentication, it will use the Windows credentials of the logged in user to access the database Server and execute the commands. You have the option to supply a SQL login name and password to perform the operations instead of the Windows login.
4. Click Next

Interaction Decisions 2016 R1 Database Setup

Interaction Decisions Data Mart Information

Provide the required values to access the Interaction Decisions Data Mart Database.

Server Name:

Database Name:

☒ Windows Authentication
☐ SQL Server Authentication

User Name

Password

Back Next Cancel

Step 3: Decisions Database configuration

1. Select the Start day of the planning week (Refer to the Installation Instructions provided in the Release Package)
2. Enter the Hours per week for FTE (Refer to the Installation Instructions provided in the Release Package)
3. Enter Admin Active Directory group names (Domain name must be included)
4. Enter the User Active Directory group names (Domain name must be included)
5. Click Next

Interaction Decisions 2016 R1 Database Setup

Interaction Decisions Database Configuration

Provide the required configurations for Planning week and Authentication of Interaction Decisions.

☒ Sunday ☐ Monday ☐ Tuesday ☐ Wednesday ☐ Thursday ☐ Friday ☐ Saturday

Hours Per Week: 40.0

Admin AD Group Name:

User AD Group Name:

Back Next Cancel

Step 4: Complete Deployment

1. Review summary data screen
2. Click Install
3. Wait for Process Complete window
4. Click Exit

If process does not complete successfully, review log file in temporary folder for message error.

Section 9: Data Bus Installation

This Section walks through the step by step instructions related to the installation of the Data Bus service. The Data Bus will need to be installed only if the Data Mart database is being installed.

In this Section

- Installation Checklist
- Step 1: Data Bus Service Information

Installation Checklist

1. Individual deploying the Data Mart database requires 'serveradmin' permission on the database server ☐ _____
2. Net.Tcp Port Sharing Service running ☐ _____
3. All required ports should be open ☐ _____

Information needed for install

1. Service Account Information
2. Decisions database server and database name
3. Decisions Data Mart database server and database name
4. Data Bus publication port

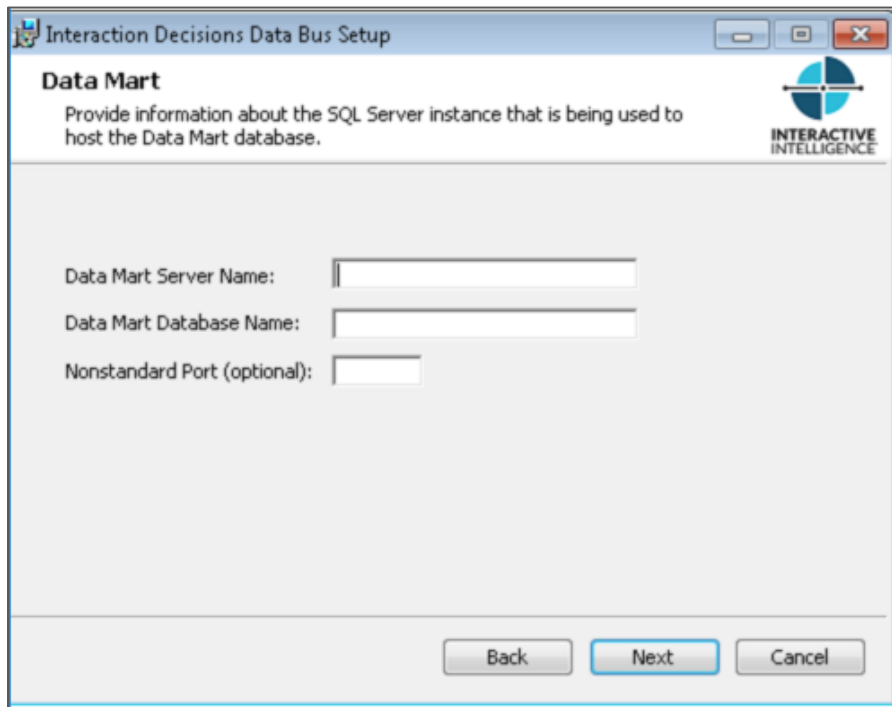
Step 1: Run the Data Bus executable

1. Double click on DataBus.exe

Step 2: Decisions Data Mart Database Information

This step is required if the Decisions Data Mart is being installed

1. Enter the Data Mart server instance name
2. Enter the Decisions Data Mart database name
3. Enter nonstandard port (optional)
4. Click Next



Interaction Decisions Data Bus Setup

Data Mart
Provide information about the SQL Server instance that is being used to host the Data Mart database.

Data Mart Server Name:

Data Mart Database Name:

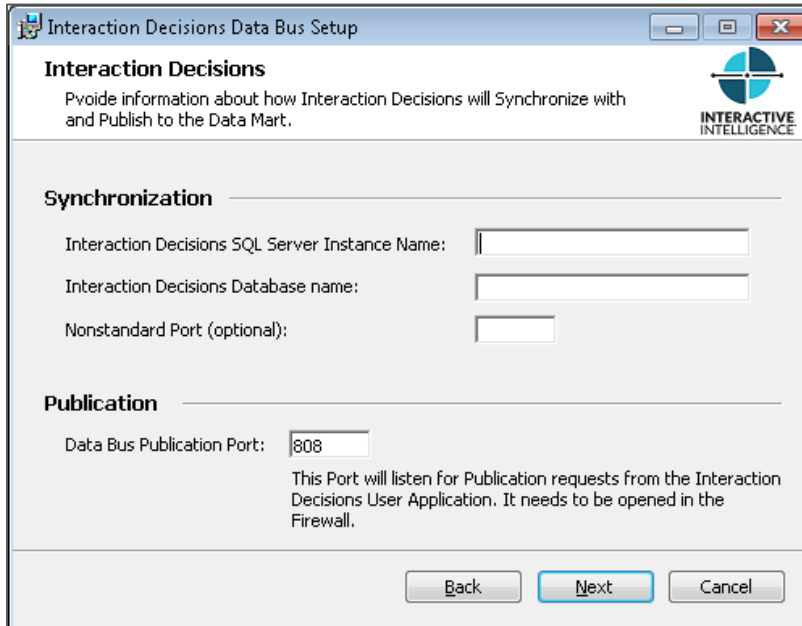
Nonstandard Port (optional):

Back Next Cancel

Step 3: Decisions Database Information

This step is required if the Decisions Data Mart is being installed

1. Enter the SQL server instance name
2. Enter the Decisions database name
3. Enter nonstandard port (optional)
4. Enter the Data Bus publication port
5. Click Next



The screenshot shows the 'Interaction Decisions Data Bus Setup' window. The title bar reads 'Interaction Decisions Data Bus Setup'. The main heading is 'Interaction Decisions' with a subtext: 'Provide information about how Interaction Decisions will Synchronize with and Publish to the Data Mart.' The 'INTERACTIVE INTELLIGENCE' logo is in the top right. The window is divided into two sections: 'Synchronization' and 'Publication'. Under 'Synchronization', there are three input fields: 'Interaction Decisions SQL Server Instance Name:', 'Interaction Decisions Database name:', and 'Nonstandard Port (optional):'. Under 'Publication', there is one input field: 'Data Bus Publication Port:' with the value '808' entered. Below this field is a note: 'This Port will listen for Publication requests from the Interaction Decisions User Application. It needs to be opened in the Firewall.' At the bottom, there are three buttons: 'Back', 'Next', and 'Cancel'.

Interaction Decisions
Provide information about how Interaction Decisions will Synchronize with and Publish to the Data Mart.

Synchronization

Interaction Decisions SQL Server Instance Name:

Interaction Decisions Database name:

Nonstandard Port (optional):

Publication

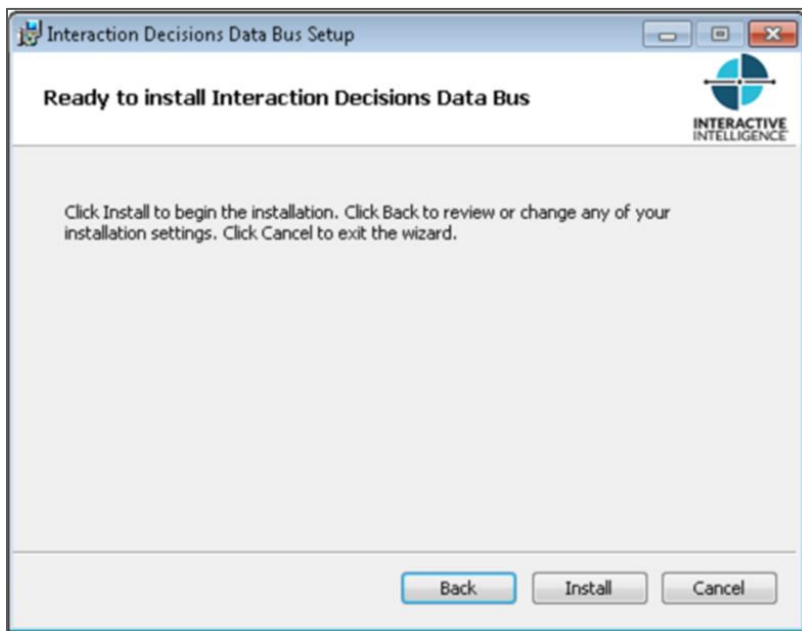
Data Bus Publication Port:

This Port will listen for Publication requests from the Interaction Decisions User Application. It needs to be opened in the Firewall.

Back Next Cancel

Step 4: Complete Installation

1. Click Install



The screenshot shows the 'Ready to install Interaction Decisions Data Bus' window. The title bar reads 'Interaction Decisions Data Bus Setup'. The main heading is 'Ready to install Interaction Decisions Data Bus'. The 'INTERACTIVE INTELLIGENCE' logo is in the top right. The text in the center says: 'Click Install to begin the installation. Click Back to review or change any of your installation settings. Click Cancel to exit the wizard.' At the bottom, there are three buttons: 'Back', 'Install', and 'Cancel'.

Ready to install Interaction Decisions Data Bus

Click Install to begin the installation. Click Back to review or change any of your installation settings. Click Cancel to exit the wizard.

Back Install Cancel

Section 10: Client Installation

This Section walks through the step by step instructions related to the installation of the Decisions Admin and User applications.

In this Section

- Installation Checklist
- Step 1: Launch setup executable
- Step 2: Select application(s) to install
- Step 3: Enter Decisions database information
- Step 4: Enter Data Bus Service Information
- Step 5: Complete installation

Installation Checklist

Permissions

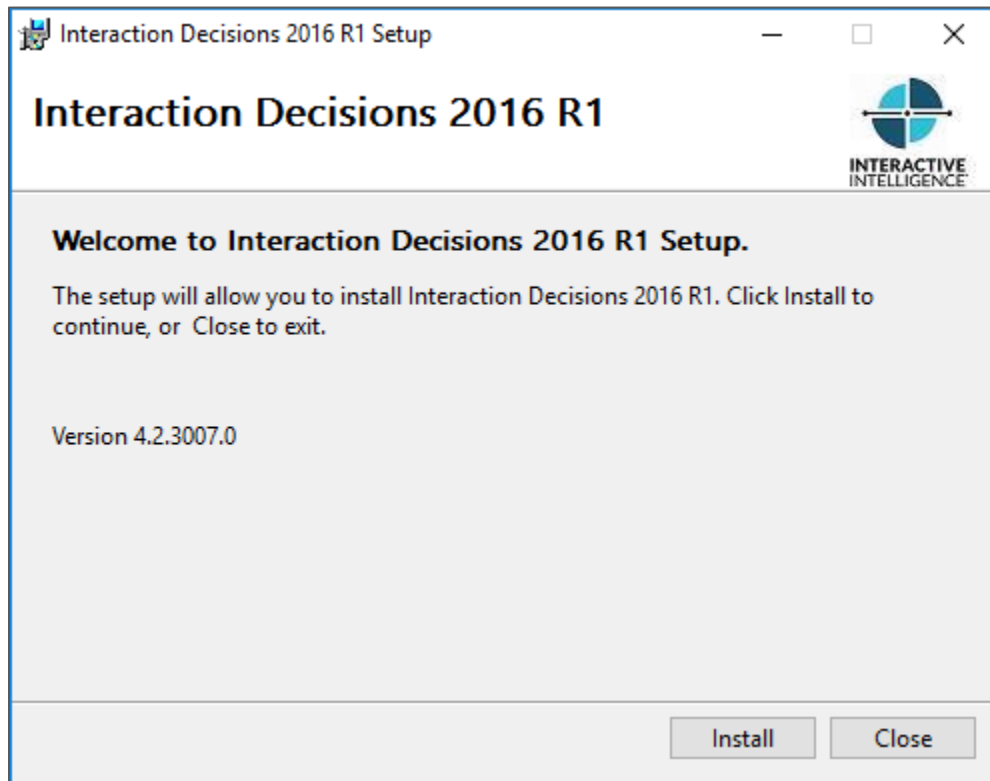
1. Individual installing the Decisions applications must be an admin on the machine ☐ _____
2. Ensure Data Bus service has been started ☐ _____

Information needed for install

1. Decisions database server and database name
2. Data Bus publication port (defaults to 808)
3. Nonstandard port information (if applicable)

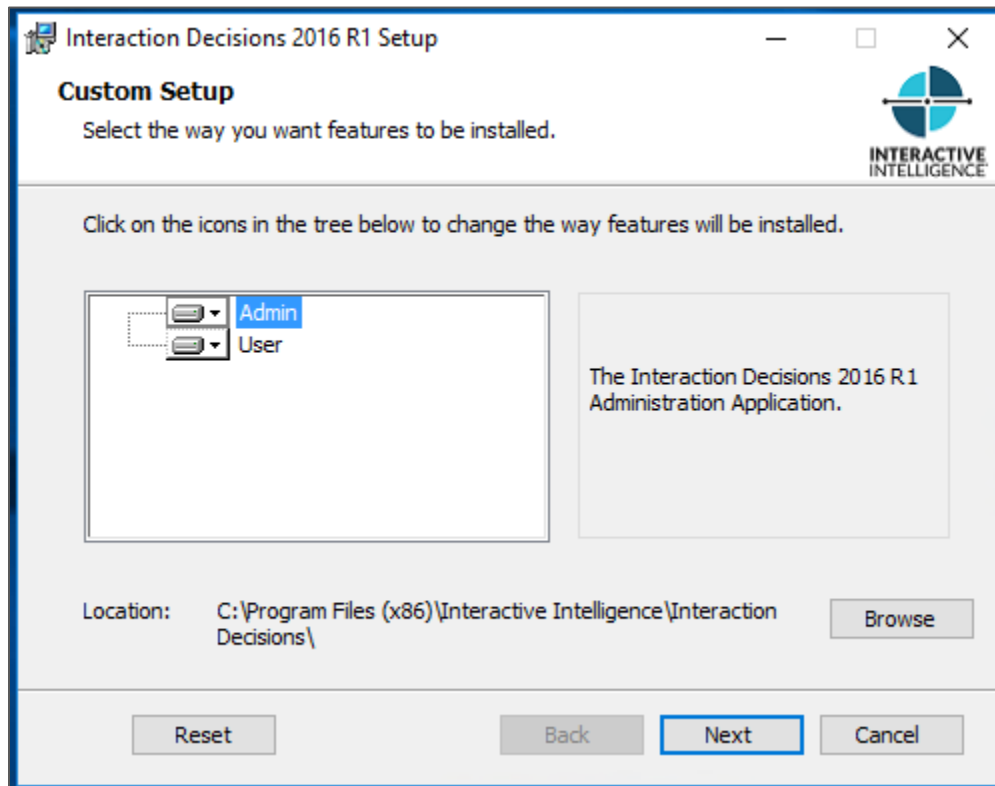
Step 1: Launch setup executable

1. Right click, run as Administrator
2. Click Next



Step 2: Select application(s) to install

1. Click on the icon(s) for the application(s) to be installed
2. Select installation location (default is listed in the screen prompt)
3. Click Next



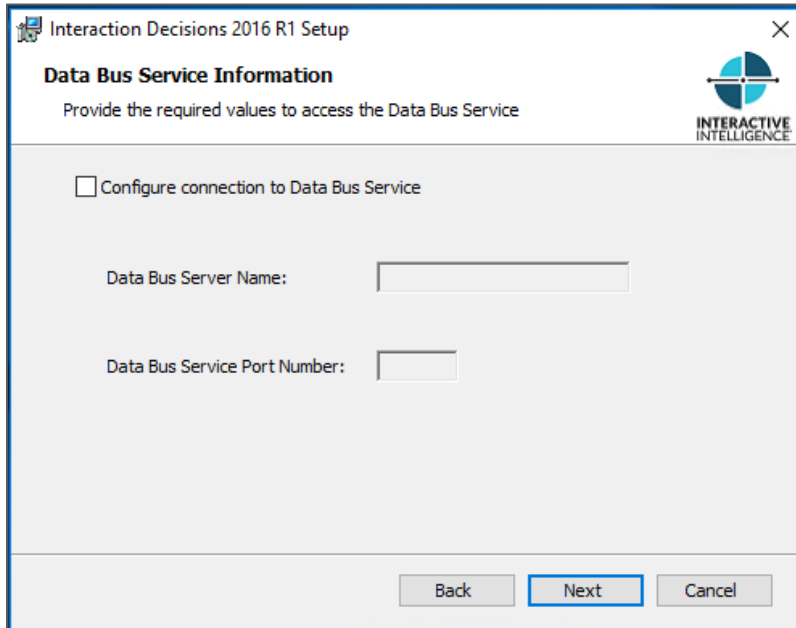
Step 3: Decision Database Information

1. Enter Decisions server name
2. Enter Decisions database name
3. Click Next

The screenshot shows a Windows-style setup window titled "Interaction Decisions 2016 R1 Setup". The window has a close button (X) in the top right corner. Below the title bar, the text "Database Information" is displayed in bold. Underneath, a subtitle reads "Provide the required values to access the Interaction Decisions 2016 R1 Database". In the top right corner of the main content area, there is a logo for "INTERACTIVE INTELLIGENCE" consisting of a stylized blue and white circular icon. The main area contains two text input fields: "Server Name:" followed by an empty text box, and "Database Name:" followed by another empty text box. At the bottom of the window, there are three buttons: "Back", "Next" (which is highlighted with a blue border), and "Cancel".

Step 4: Data Bus Information

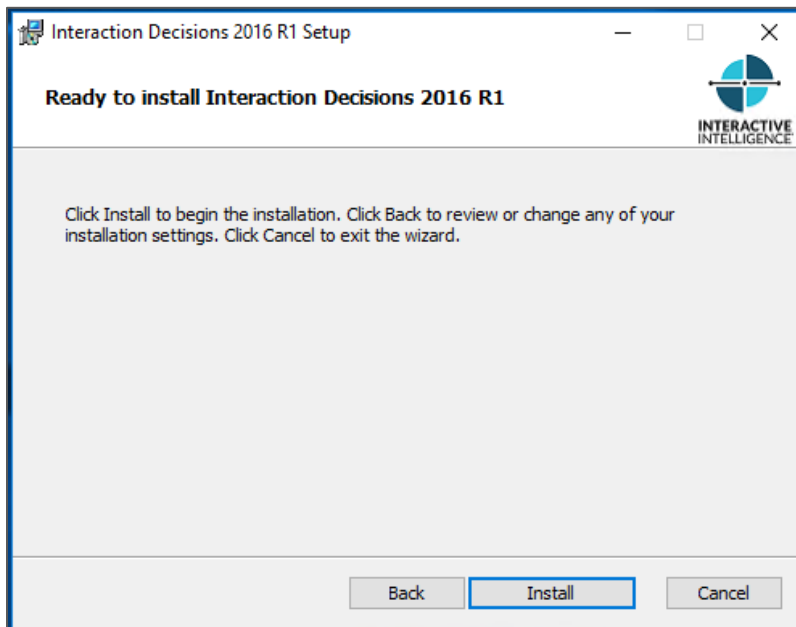
1. If the Data Mart is being deployed, select Configure connection box
2. Enter Data Bus Server Name
3. Enter Data Bus publication port number
4. Click Next



The screenshot shows a window titled "Interaction Decisions 2016 R1 Setup" with a close button (X) in the top right corner. The window has a blue border and a logo for "INTERACTIVE INTELLIGENCE" in the top right. The main title is "Data Bus Service Information" with a subtitle "Provide the required values to access the Data Bus Service". Below this, there is a checkbox labeled "Configure connection to Data Bus Service". Underneath the checkbox, there are two input fields: "Data Bus Server Name:" and "Data Bus Service Port Number:". At the bottom of the window, there are three buttons: "Back", "Next" (which is highlighted with a blue border), and "Cancel".

Step 5: Complete Installation

1. Click Install



The screenshot shows a window titled "Interaction Decisions 2016 R1 Setup" with standard window controls (minimize, maximize, close) in the top right corner. The window has a blue border and a logo for "INTERACTIVE INTELLIGENCE" in the top right. The main title is "Ready to install Interaction Decisions 2016 R1". Below the title, there is a paragraph of text: "Click Install to begin the installation. Click Back to review or change any of your installation settings. Click Cancel to exit the wizard." At the bottom of the window, there are three buttons: "Back", "Install" (which is highlighted with a blue border), and "Cancel".

Chapter 4: Post Installation

After the successful deployment and installation of the Decisions database(s) and applications in the test/non-production environment, a member of the Decisions team will assist with completing basic connectivity testing and the deployment in the production environment.

In this chapter:

- Section 11: Basic connectivity testing
- Section 12: Production deployment
- Section 13: Modify configuration files

Section 11: Basic connectivity testing

Basic connectivity testing includes the following:

- Log into the application(s)
- Add unmapped routing
- Map import file path
- Test import

Detailed steps for the above can be found in the Decisions Admin User Guide.

After the successful completion of the basic user testing, Decisions can be deployed in the production environment.

Section 12: Production deployment

If the system configuration was completed in the test or non-production environment, follow the steps below to deploy Decisions to the production environment.

- Backup the Decisions Database on the Test/Non-production SQL Server Instance
- Restore the Decisions Database on the Production SQL Server Instance.
- Follow the steps for deploying the Decisions Data Mart Database in Section 8
- Follow the steps for installing the Decisions Data Bus in Section 9
- Follow the steps for adding the appropriate AD groups in Section 5
- Modify Admin, User configuration files, and Data Bus configuration file with production information

Section 13: Modify configuration files

Modify the AdminCenterbridge.exe.config file and the Centerbridge.exe.config file to point to the Production SQL Server Instance and the Production Database. If Data Mart is configured, the files will also need to be updated with the Data Mart and Data Bus binding information.

Example:

```
<Database connectionType="SQLServer" databaseServer="Test" databaseName="Test"/></Server>  
<client>  
  <endpoint binding="netTcpBinding" address="net.tcp://YOURSERVERNAME:808/PublicationService"
```

Chapter 5: PureEngage Adapter 8.5

In this chapter:

- Section 14: Requirements for direct pull from Genesys Info Mart and PureEngage Workforce Management (WFM)

Section 14: Requirements for direct pull from Genesys Info Mart and PureEngage WFM

This section lists the requirements for creating Decisions data feeds using Genesys PureEngage 8.5 Adapter to pull data from the Genesys Info Mart database and the PureEngage WFM server.

Genesys Info Mart database:

- Host machine: Windows OS
- Database engine: MS SQL 2008 (or above) or Oracle 11.2 (or above)
- Info Mart database 8.5.002 (or above) with Reporting and Analytics Aggregates(RAA) installed

The Decisions Admin AD group must have read permission to access the Info Mart database. If Oracle is used, users of the Admin application must be configured to connect with Windows authentication.

Note: The host machine must be accessible to the Decisions Admin application (the machine running Admin must be able to "see" the Genesys Info Mart machine).

PureEngage WFM Server

PureEngage WFM Server: 8.5.205.10 (or above)

Users of the Decisions Admin application must have a user account in the PureEngage WFM Server.

Note: The PureEngage WFM Server must be accessible to the Decisions Admin application (the machine running Admin must be able to "see" the WFM server).