



Genesys Interactive Insights 7.6

Deployment Guide

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Preface

Welcome to the *Genesys Interactive Insights 7.6 Deployment Guide*. This document introduces you to the configuration, installation, set-up, and start procedures relevant to the set-up of Interactive Insights universe and operation of its reports. This guide is valid only for the 7.6.x releases of Interactive Insights.

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

- [Intended Audience, page 8](#)
- [Chapter Summaries, page 8](#)
- [New in This Release, page 9](#)
- [Document Conventions, page 10](#)
- [Related Resources, page 11](#)
- [Making Comments on This Document, page 13](#)

Interactive Insights provides a set of contact-center reports for operation with Genesys Info Mart.

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.
- The structure of and connectivity parameters for the Genesys Info Mart database.
- BusinessObjects Enterprise XI, 3.1 software, which is the third-party tool from which the Interactive Insights reports and universe were built.
- Your own network configurations.

You should be familiar also with general principles of report design and structured query language.

Chapter Summaries

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

- [Chapter 1, “Interactive Insights Overview”](#), beginning on [page 15](#), sketches the inter-relationships 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 21](#), describes the minimum subset of Business Objects Enterprise components that are needed for Interactive Insights operation.
- [Chapter 3, “Which Genesys Products Must Be Installed?”](#), beginning on [page 31](#), provides a listing of Genesys components that are required for Interactive Insights operation.
- [Chapter 4, “Installing Interactive Insights”](#), beginning on [page 39](#), lists the prerequisites for installation and describes the steps to deploy Interactive Insights on UNIX and Microsoft Windows platforms.
- [Chapter 5, “Setting Up the Universe”](#), beginning on [page 55](#), points out the additional setup steps that are required to ready your environment.
- [Chapter 6, “Migrating Interactive Insights”](#), beginning on [page 79](#), 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 7, “Accessing Interactive Insights Components”](#), beginning on [page 87](#), 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 describing how to use these applications.

- [Chapter 8, “Uninstalling Interactive Insights”](#), beginning on [page 91](#), describes the wizard-driven and manual steps that are required to uninstall Genesys Interactive Insights.
- [Chapter 9, “Application Files”](#), beginning on [page 95](#), describes the Interactive Insights files that are deployed during installation.

New in This Release

The 7.6.2 release of Interactive Insights provides the following general changes to this document:

- New URL has been provided for BusinessObjects Enterprise (BOE) documentation, [page 21](#).
- Change in recommendation of use of the latest BOE Service Packs (SP), Fix Packs (FPs), and Hot Fixes (HFs) to the latest *Genesys-tested* SPs, FPs, and HFs ([page 28](#)).
- Columns have been added to [Table 1](#) to show additional Genesys Info Mart (GIM) configuration options that impact the content of the aggregation tables that Interactive Insights uses. See [page 35](#).
- Operating-system support for Windows 2000 has been added, [page 40](#).
- Changes to the Interactive Insights installation routine to reflect improvements in deployment are described beginning on [page 41](#).
- Additional deployed folders and objects are listed in section “Universe Contents” on [page 49](#).
- New section introducing the versioning of the Interactive Insights universe and reports is described beginning on [page 52](#).
- Change in location of Interactive Insights elements in the BOE repository is illustrated in Figure 12 on [page 57](#) and addressed elsewhere within the document.
- New chapter, [Chapter 6, “Migrating Interactive Insights”](#), has been provided to address how to migrate your custom Interactive Insights reports. See [page 79](#).
- [Chapter 9, “Application Files”](#) was completely revamped to describe the new and modified scripts and applications that the installation routine calls to deploy Interactive Insights. See [page 95](#).

Other changes, more specific to the Interactive Insights universe, are described in the *Genesys Interactive Insights 7.6 Universe Guide*.

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. Here is a sample version number:

76ii_dep_08-2009_v7.6.201.00

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

Type Styles

Italic

In this document, italic is used for emphasis, for the titles of documents, definitions of (or first references to) unfamiliar terms, and mathematical variables.

- Examples:**
- Do *not* use this value for this option.
 - Please consult the *Genesys Migration Guide* for more information.
 - 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 . . .

Monospace Font

A monospace font, which looks like teletype or typewriter text, is used for all programming identifiers and GUI (graphical user interface) 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; and code samples.

- Examples:**
- Select the Show `variables` on screen check box.
 - Click the `Summation` button.
 - On the `Properties` page, enter the value for the host server in your environment.
 - In the `Operand` text box, enter your formula.
 - Click `OK` to exit the `Properties` page.

- The following table presents the complete set of error messages that T-Server® distributes 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.

Monospace is used also for any text that users must enter manually during a configuration or installation procedure, or on a command line:

Example: • Enter `exit` on the command line.

Screen Captures Used in This Document

Screen captures from the product GUI, as used in this document, sometimes might contain a minor spelling, capitalization, or grammatical error. The text that accompanies and explains the screen captures corrects such errors *except* when such a correction would prevent you from installing, configuring, or using the product successfully. 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.

Square Brackets

Square brackets ([]) indicate that a particular parameter or value 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. Here is a sample:

```
smcp_server -host [/flags]
```

Angle Brackets

Angle brackets (< >) indicate a placeholder for a value that the user must specify. This value might be a DN or port number that is specific to your enterprise. Here is a sample:

```
smcp_server -host <confighost>
```

Related Resources

Please consult these additional resources as necessary:

- *Genesys Interactive Insights 7.6 Universe Guide*, which describes, in detail, the reports and metrics that are provided in the Genesys Interactive Insights release.
- *Genesys Interactive Insights 7.6 User's Guide*, which summarizes how to operate Interactive Insights reports by using InfoView and provides basic instruction for customizing your own reports.

- The Business Objects documentation set, including the following manuals¹:
 - *BusinessObjects Enterprise XI 3.1 Deployment Planning Guide*
 - *BusinessObjects Enterprise XI 3.1 Installation Guide for Windows (for UNIX)*
 - *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*
 - *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 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 web site are available only to direct SAP customers.

- The Genesys Info Mart 7.6 documentation set including the following manuals:
 - *Genesys Info Mart 7.6 Reference Manual* for your RDBMS type, for table and field descriptions of the Info Mart.
 - *Genesys Info Mart 7.6 Deployment Guide*, which will help you configure and install Genesys Info Mart 7.6.

¹ Genesys believes that some Business Objects documents that were available as of the publication of this *Genesys Interactive Insights 7.6 Deployment Guide* were mistitled. The references that we provide to such documents use the intended titles.

- The *Genesys Technical Publications Glossary*, which ships on the Genesys Documentation Library DVD and provides a comprehensive list of the Genesys and CTI terminology and acronyms that are used in this document.
- The Release Notes and Product Advisories for this product, which are available on the Genesys Technical Support Web site in the following location: <http://genesyslab.com/support>.

Information on supported hardware and third-party software is available on the Genesys Technical Support Web site, in the following documents:

- *Genesys Supported Operating Environment Reference Manual*
- *Genesys Supported Media Interfaces*

Finally, Genesys product documentation is available on the:

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

Making Comments on This Document

If you especially like or dislike anything about this document, please feel free to e-mail your comments to Techpubs.webadmin@genesyslab.com.

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 information that is found in this document only and to the way in which the information is presented. Speak to Genesys Technical Support if you have suggestions about the product itself.



Chapter

1

Interactive Insights Overview

Genesys Interactive Insights 7.6 uses the data that is stored in a Genesys Info Mart (GIM) 7.6 database 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 7.6 operation.

The chapter includes the following sections:

- [Interactive Insights Reports and Universe, page 15](#)
- [Genesys Info Mart 7.6, page 16](#)
- [BusinessObjects Enterprise, page 18](#)
- [Deploying Interactive Insights, page 20](#)

Interactive Insights Reports and Universe

Interactive Insights is the presentation layer that Genesys has designed for the business-like interpretation of source data that is collected and stored in the GIM database. Interactive Insights provides a universe of over 200 defined agent-, queue-, business attribute-, and interaction-type measures and over 20 reports that summarize agent session states and the inbound voice-related activity that is directed throughout your contact center. 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 7.6 Universe Guide* for in-depth details about the Genesys-provided reports and metrics.

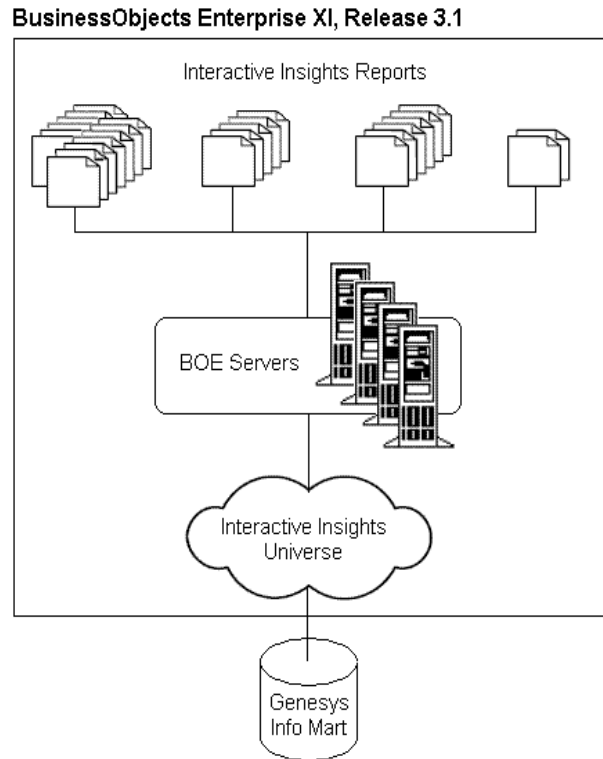


Figure 1: BOE Architecture Using Interactive Insights

Genesys Info Mart 7.6

The GIM Server extracts, transforms, and loads contact center data at the most atomic level—the interaction—enabling maximum flexibility of data interpretation. This low level of detail is good for tracking, verification, 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.

To enable Interactive Insights functionality, additional interaction, state, and resource fact tables were added to Info Mart 7.6 schema. GIM compiles data from these and other fact tables and stores the data in several new aggregate tables (beginning with A62_*) also introduced with the 7.6 release. Use of these aggregates (available in 30-minute-, hour-, day-, week-, month-, quarter-, and year-level tables) drastically improves query performance when you run reports.

Refer to the “Interactive Insights Reports” chapter of the *Genesys Interactive Insights 7.6 Universe Guide* for a list of the underlying Info Mart source tables of each Interactive Insights report and the *Genesys Info Mart 7.6 Reference Manual* for your RDBMS type for in-depth descriptions of these tables and their columns. This *Reference Manual* also describes in detail the context in which these tables can be applied—subject areas that consist of the aggregate

tables surrounded, in a star-schema format, by the dimension tables to which they are joined. [Figure 2](#) depicts two such subject areas for the AG2_INB_V_QUEUE_ABN and the AG2_INB_V_I_XN_ID tables and views.

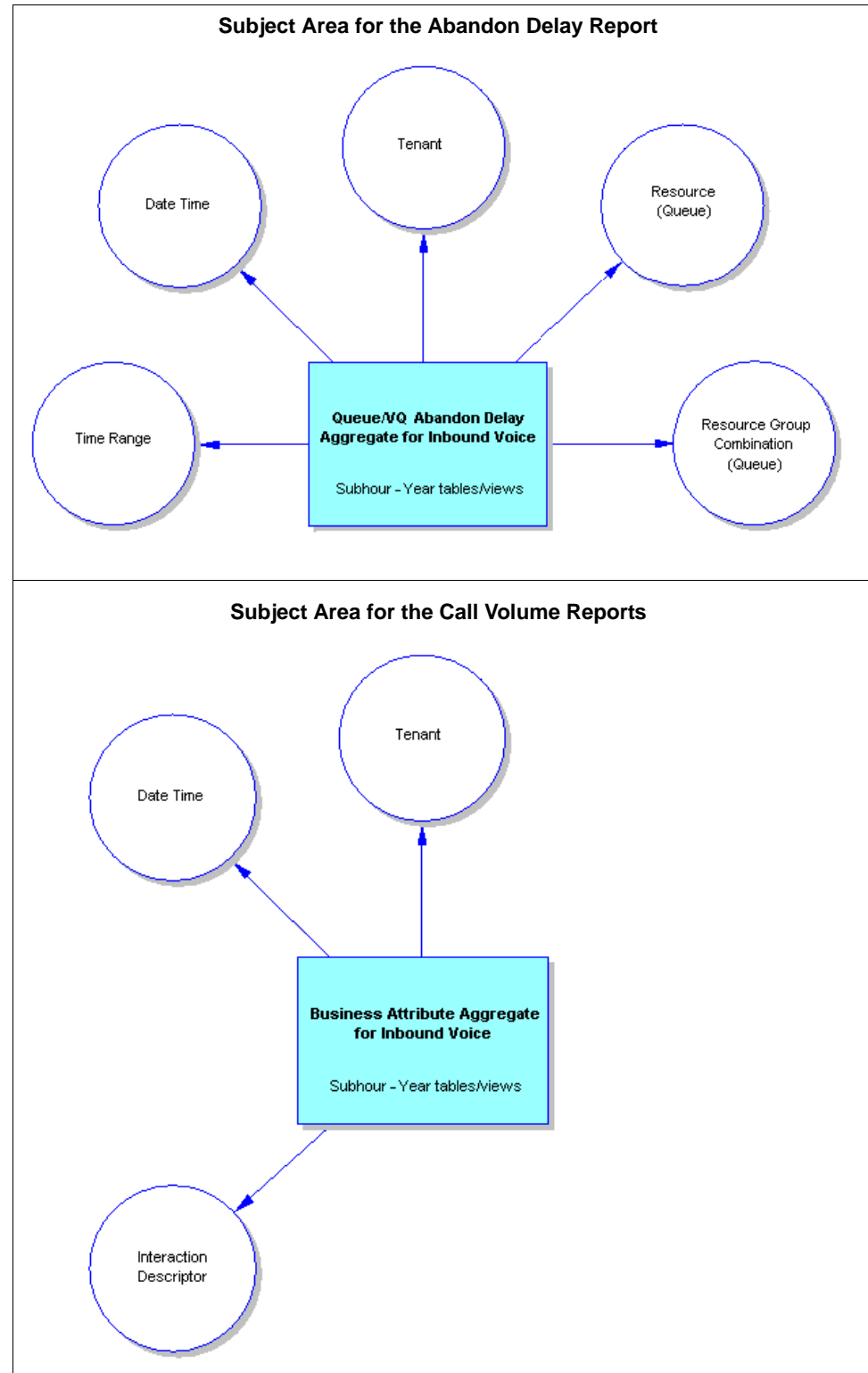


Figure 2: Subject Areas for the Abandon Delay and Call Volume Interactive Insights Reports

The Interactive Insights reports touch upon 12 such subject areas:

- Business Attributes for Inbound Voice subject area (This is referred to as the Aggr2_Inb_V_Ixn_IxnDscr subject area in the GIM documentation set.)
- Agent Session States subject area (Aggr2_Inb_V_I_Ag_Session_State)
- Reasons Codes subject area (Aggr2_Inb_V_I_Ag_State_Reason)
- Agent Activity for Inbound Voice subject area—disposition-based (Aggr2_Inb_V_Ixn_Agent)
- Agent Activity for Inbound Voice subject area—interval-based (Aggr2_Inb_V_I_Ixn_Agent)
- Agent Group Activity for Inbound Voice subject area (Aggr2_Inb_V_Ixn_Agent_Grp)
- Agent–Queue/VQ for Inbound Voice subject area (Aggr2_Inb_V_Agent_Q)
- Queue/VQ for Inbound Voice subject area (Aggr2_Inb_V_Q)
- Queue/VQ Abandon Delay for Inbound Voice subject area (Aggr2_Inb_V_Q_Abn)
- Speed of Answer Queue/VQ for Inbound Voice subject area (Aggr2_Inb_V_Q_Ans)
- Queue/VQ for Inbound Voice subject area (Aggr2_Inb_V_Q_Group)
- Interaction Resource subject area

Refer to the *Genesys Info Mart 7.6 User's Guide* for a complete set of dimensional models depicting each subject area.

This release of Genesys Interactive Insights supports generating reports from GIM data sources managed by the following RDBMSs:

- Oracle 9.2 and 10g.
- IBM DB2 9.1 and 8.2.
- Microsoft SQL Server 2000 and 2005.

Refer to the *Genesys 7 Supported Operating Environment Reference Manual* for additional information about support on these database platforms.

BusinessObjects Enterprise

BusinessObjects Enterprise XI 3.1 is the business intelligence software that Genesys has selected to power Interactive Insights 7.6. 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 3](#). Many of these components, however, are not used for Interactive Insights operation. [Figure 4](#) shows the minimum BOE XI 3.1 components that are required to use the Interactive Insights universe and generate Interactive Insights reports.

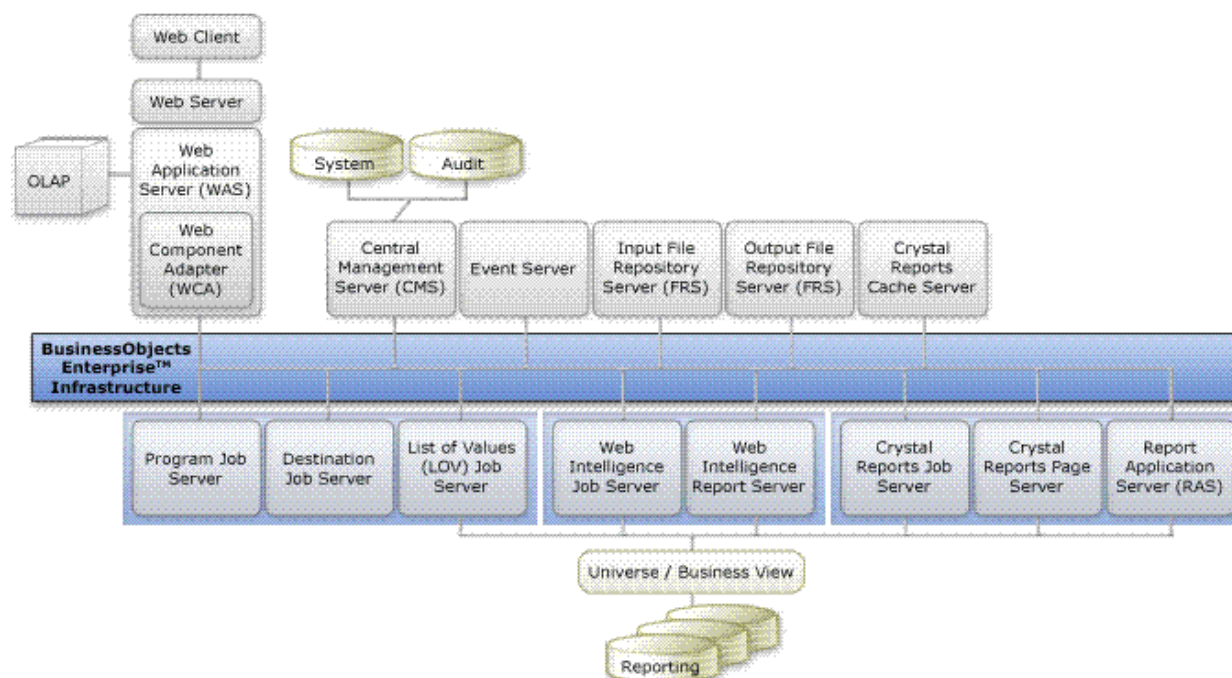


Figure 3: BusinessObjects Enterprise XI 3.1 Architecture

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

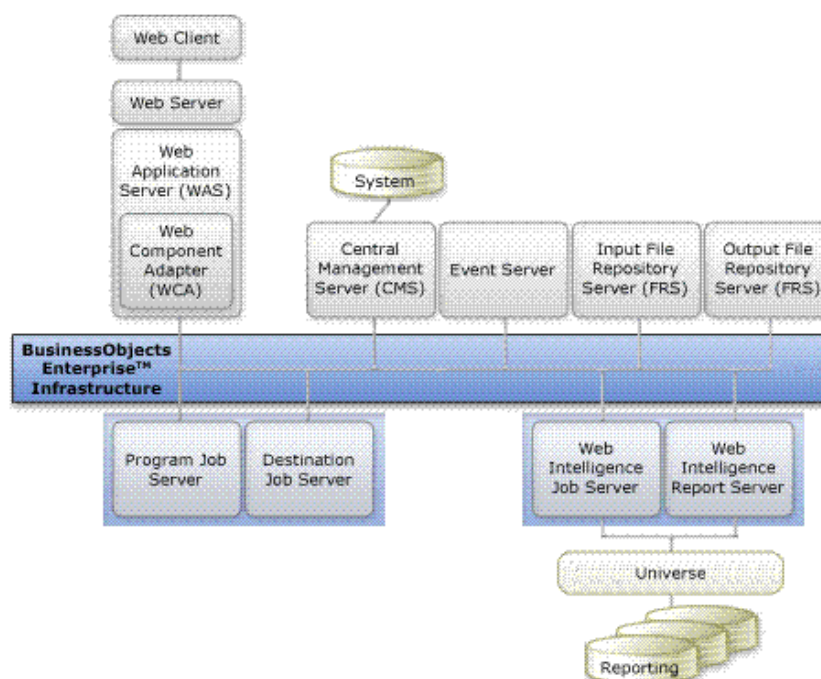


Figure 4: Minimum BOE Components for Interactive Insights Operation

Deploying Interactive Insights

Genesys has positioned Interactive Insights as an option to Genesys Info Mart 7.6. To use Interactive Insights, you must perform, at minimum, two independent installations. A third independent installation is required if you elect install BOE apart from the installation of Interactive Insights:



- Genesys Info Mart 7.6—You must have the Genesys Info Mart 7.6 CD (or image) to install Info Mart 7.6. Please refer to the *Genesys Info Mart 7.6 Deployment Guide* for instructions on installing this product, and to Chapter 3, “Which Genesys Products Must Be Installed?,” on [page 31](#) of this document, for additional information.
- 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 7.6—You must have the Genesys Interactive Insights 7.6 CD (or image) to install the Genesys Interactive Insights 7.6 universe and reports. This installation routine includes commands to install BOE XI 3.1 silently, at your election. Refer to Chapter 4, “Installing Interactive Insights,” on [page 39](#) of this document for deployment instructions.

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



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 elect 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 4, “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 22](#)
- [Required BOE XI 3.1 Components, page 24](#)
- [Installing BOE XI 3.1 Prior to Installing Interactive Insights, page 27](#)
- [BOE XI 3.1 Service/Fix Packs and Hot Fixes, page 28](#)

- [Setting Up the BOE XI 3.1 Environment, page 28](#)

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 7.6. 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 7.6. 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
- 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 5.

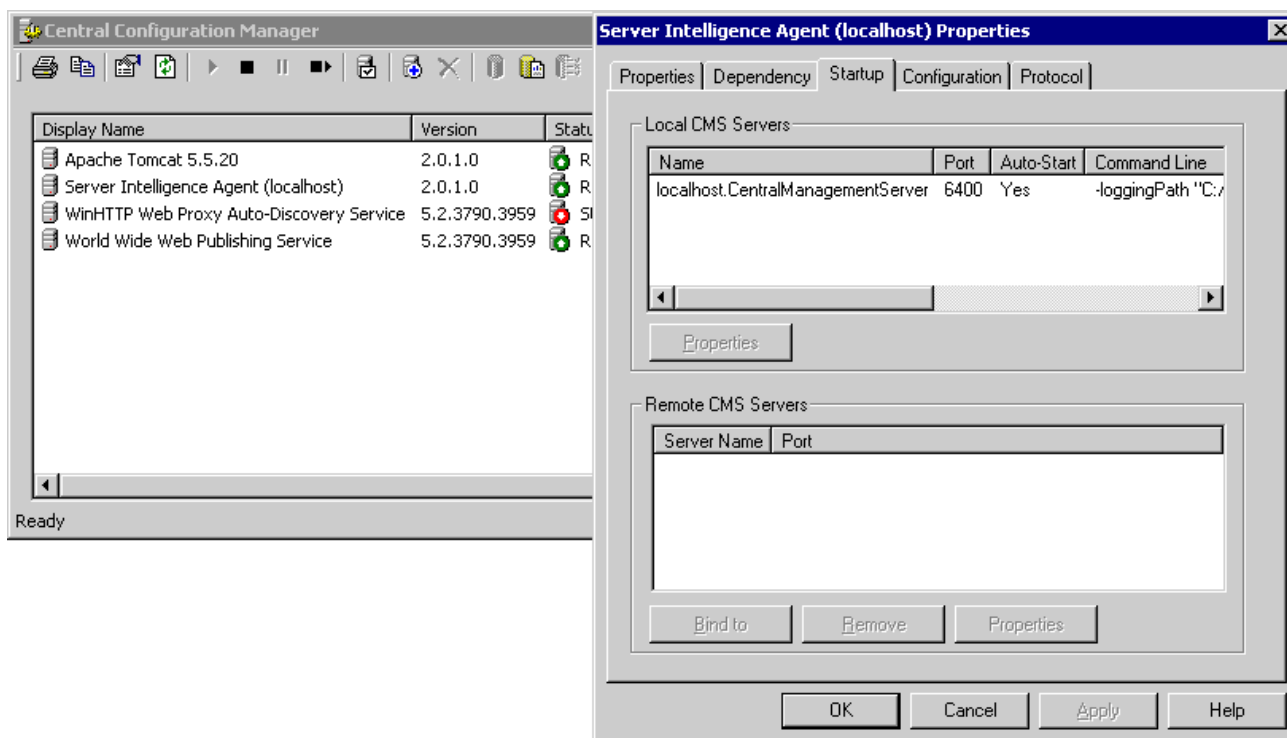


Figure 5: Obtaining the CMS Port

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.

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

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 6](#)), 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.

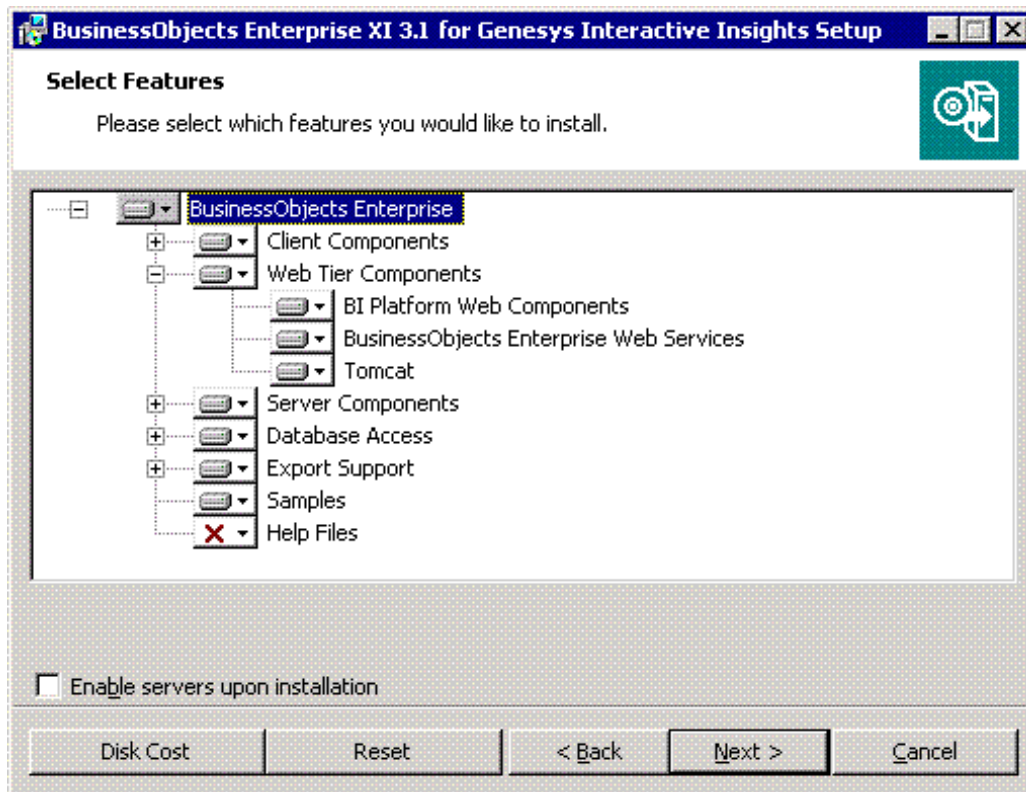


Figure 6: Select BOE Features

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 only to those RDBMSs that currently are supported in the Genesys Info Mart 7.6 release—namely, the following:

- Data Federator
- IBM DB2
- Microsoft
- Oracle

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

- MySQL, as this RDBMS is used for communication with the Central Management Server (CMS) database.
- Generic ODBC, 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 *Interactive Insights 7.6 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 39](#). 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

Genesys recommends 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 from the SAP website, in addition to those that come bundled with Genesys Interactive Insights. Please note that Interactive Insights software might respond differently from what you might expect when used in conjunction with untested service and fix packs. Please refer to Table 5 on [page 80](#) to learn about the BOE software that is recommended for operation with Interactive Insights 7.6.

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 7.6.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 administrative user. Users, their roles, and access to the reports and to the universe set up in accordance with your company's policy. For multi-tenant environments, consider creating separate groups, at minimum, for each tenant to align with the manner in which universe connections to the Genesys Info Mart should be defined.

Refer to [page 61](#) 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

Which Genesys Products Must Be Installed?

Genesys Interactive Insights pulls data directly from a 7.6 release of 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 operational. From a practical standpoint, however, Info Mart should be populated regularly with meaningful data that is sourced from the activities of your contact-center activities that are directed, monitored, and recorded by a number of Genesys products.

This chapter briefly describes the components on which Genesys Info Mart depends and what data you can expect in your reports given a particular release of that software:

- [Genesys Info Mart, page 32](#)
- [Genesys Info Mart Dependencies, page 32](#)
- [Setting Up the GIM Environment, page 33](#)

Please refer to the *Genesys Info Mart 7.6 Deployment Guide* for the specific steps for installing Genesys Info Mart and to the *Genesys 7 Interoperability Guide* for the minimum required releases of the necessary components.

Note: When configuring a new Genesys Info Mart application, be sure to use the `Genesys_Info_Mart_ETL_760_for_GI2.tpl` application template that is provided on the Genesys Info Mart 7.6 CD (image). This template appropriately sets the GIM configuration options that are required for Interactive Insights operation.

Genesys Info Mart

Interactive Insights pulls data from aggregate (and other) tables that are available only in a 7.6 Info Mart schema. The SQL scripts that create these tables, and the improved Job_AggregateGIM, Job_LoadRecent, and Job_LoadGIM processes that populate them, are available and supported only for 7.6 and forward releases of Genesys Info Mart. Furthermore, the BOE XI 3.1 license that you receive from the Genesys-provided image authorizes you to extract data only from a Genesys Info Mart 7.6 or from data sources that are used in conjunction with GIM 7.6—the license does not extend backward to prior releases of Genesys Info Mart. Licensing does, however, extend support to pre-7.6 data that is migrated to an Info Mart 7.6 schema.

Genesys Info Mart Dependencies

With respect to the end data displayed in the Interactive Insights reports, GIM 7.6 gathers source data from IDB (Interaction Concentrator's database), which, in turn, collects data from the following Genesys server components:

- T-Server
- Outbound Contact Server
- Interaction Server

The solutions for these Genesys components, in turn, have yet other dependencies and you are directed to the respective Genesys documentation sets to fully appreciate them. GIM 7.6 does include data from other data sources, through IDB, but their data is not reflected in Interactive Insights 7.6 reports, and hence, are not a dependency for Interactive Insights. To maximize report utility, you should configure GIM by using the latest supported version of these products.

Interaction Concentrator

Genesys Info Mart 7.6 is supported with Interaction Concentrator 7.6. One of this product's many new features enables the storage of data reflecting an agent's uninterrupted Not Ready and ACW states. This data, which the GIM Server pulls from IDB, is the primary source of information for the Agent ACW and Not Ready Interactive Insights reports. These reports provide, among other measures, the number and duration of calls that an agent receives while the agent is in ACW or Not Ready state. To configure your reporting environment to recognize uninterrupted ACW/Not Ready, you must set options appropriately in the ICON application that supplies data to GIM. The specific configuration option for this feature is `gls-enable-acw-busy`, but you should review the entire *Interaction Concentrator 7.6 Deployment Guide* for information about other configuration options that also have an impact.

Universal Routing Server

If it is configured to do so, ICON collects the results of routing strategies that are designed within the Universal Routing Server (URS). The URS 7.6 release provides extended virtual queue support, which enables more detailed reporting over URS 7.5—describing why interactions are cleared from virtual queues, including:

- Diversion from another virtual queue.
- Default routing by switch.
- Default routing by a strategy.

These features are manifested in some of the measures that are provided by the Queue/Virtual Queue Interactive Insights reports, including the *Calls RONA* and *Calls Diverted* measures. Refer to the *Universal Routing 7.6 Deployment Guide* and the *Interaction Concentrator 7.6 Deployment Guide* for information about how to configure this functionality.

Multimedia Interaction Server

The Multimedia Solution also enables this functionality if virtual queue handling of voice interactions is configured on the multimedia switch. Refer to the *Multimedia 7.6 Deployment Guide* and to the GIM documentation set for further details.

Setting Up the GIM Environment

A Genesys Info Mart 7.6 installation (or upgrade) creates the tables that are referenced by the Interactive Insights reports. The *Genesys Info Mart 7.6 Deployment Guide* describes the installation process; the *Genesys Info Mart 7.6 Deployment Guide* describes the migration process; the *Genesys Interactive Insights 7.6 Universe Guide* lists the underlying tables for each report and the underlying columns for each measure; and the *Genesys Info Mart 7.6 Reference Manual* (for your RDBMS) describes the tables and table fields of the Info Mart.

In addition, to prepare the GIM environment for Interactive Insights operation, you must perform additional set-up steps including:

- Running the `make_gi2.sql` script.
- Setting GIM configuration options appropriately.

Running the `make_gi2` Script

The `make_gi2.sql` script gets deployed to the Interactive Insights folder *after* you have installed Interactive Insights (see Chapter 9, “Application Files,” on [page 95](#)). The script creates additional views that the Interactive Insights

reports reference; it must be run against every Info Mart schema that serves as a data source for the reports. Refer to “Deploying Utility Views Specific to Interactive Insights” on [page 55](#) for further information.

Checking GIM Configuration

Genesys Info Mart 7.6 offers several new configuration options over Genesys Info Mart 7.5 that have a direct effect on the data that is retrieved in Interactive Insights reports. For the most part, these options determine whether or how the Job_MaintainGIM, Job_AggregateGIM, and Job_LoadGIM processes will populate certain aggregate tables (all of which are prefaced with A62_* for Interactive Insights) in the Genesys Info Mart application on which the Interactive Insights reports are built. If you create a new Genesys Info Mart application from the Genesys_Info_Mart_ETL_760_for_GI2.tpl application template, these options are set appropriately automatically. In addition, this template turns off (sets to FALSE) some options that are not needed for Interactive Insights operation, including:

- populate-resource-session-facts
- populate-resource-state-facts
- populate-resource-state-reason-facts

If, however, any of the following apply, you will have to manually configure options for proper Interactive Insights operation:

- You upgrade your Genesys Info Mart application from a 7.5 (or prior) release
- You want to activate only some of the Interactive Insights functionality
- You build your GIM 7.6 application, for some reason, from other than the Genesys_Info_Mart_ETL_760_for_GI2 template.

[Table 1](#) summarizes only some of the front-line GIM configuration options that affect Interactive Insights. They must be set for the following reasons:

- For certain Info Mart tables, that supply data to Interactive Insights reports, to be populated.
- For data in those Info Mart tables to be retained or purged.
- For the speed-of-answer and abandon-delay thresholds to be defined appropriately to your environment.

In addition, review the settings of GIM’s scheduling configuration options to ensure data availability when it is expected. These include the run-load-recent-with-extract-and-transform, populate-intraday-aggregates, load-start-time, and run-aggregates configuration options as they affect all aggregate tables. The “Optimal Time to Run Reports” section the *Genesys Interactive Insights 7.6 User’s Guide* describes a special case of how the load-start-time configuration option affects the Daily Agent State Detail and Daily Agent Login-Logout reports.

Please understand that many of these configuration options are dependent on the settings of other configuration options, which may, in turn, be dependent on the settings of yet other configuration options. It is important that you review the purpose, permissible settings, and dependencies of all of the options in the *Genesys Info Mart 7.6 Deployment Guide* and appropriately set those for the desired functionality and for the tables that you want to populate. To see a mapping of which Info Mart tables feed which Interactive Insights reports, please refer to Appendix C, “Reports to Aggregation Tables Matrix” in the *Genesys Interactive Insights 7.6 Universe Guide*.

Table 1: GIM Options that Affect Content of AG2_* Info Mart Tables

Info Mart Table	Configuration Option																									
	abandon-duration-range-[n]-thold*	complex-voice-agent-env	days-to-keep-day-level-disposition-aggregates	days-to-keep-day-level-interval-aggregates	days-to-keep-hour-level-disposition-aggregates	days-to-keep-hour-level-interval-aggregates	days-to-keep-month-level-disposition-aggregates	days-to-keep-subhour-level-interval-aggregates	init+resp-duration-range-[n]-thold	populate-acd-queue-facts	populate-agent-state-interval-aggregates	populate-interaction-resource-facts	populate-interaction-resource-state-facts	populate-ixn-agent-aggregates	populate-ixn-agent-interval-aggregates	populate-ixn-service-type-aggregates	populate-queue-aggregates	populate-sm-resource-session-facts	populate-sm-resource-state-facts	populate-sm-resource-state-reason-facts	populate-sm-voice-resource-activity	populate-virtual-queue-facts	q-answer-threshold-voices	q-short-abandoned-threshold-voice	short-abandon-threshold	short-talk-threshold
AG2_INB_V_AGENT_QUEUE_HOUR		✓			✓					✓		✓					✓					✓				
AG2_INB_V_AGENT_QUEUE_DAY		✓	✓							✓		✓					✓					✓				
AG2_INB_V_AGENT_QUEUE_MONTH		✓					✓			✓		✓					✓					✓				
AG2_INB_V_I_IXN_AGENT_SUBHOUR		✓						✓				✓	✓	✓	✓	✓		✓	✓							
AG2_INB_V_I_IXN_AGENT_HOUR		✓				✓						✓	✓	✓	✓	✓		✓	✓			✓				
AG2_INB_V_I_IXN_AGENT_DAY		✓		✓								✓	✓	✓	✓	✓		✓	✓		✓					
AG2_INB_V_I_SESS_STATE_SUBHOUR		✓						✓			✓	✓	✓					✓	✓							
AG2_INB_V_I_SESS_STATE_HOUR		✓				✓					✓	✓	✓					✓	✓							
AG2_INB_V_I_SESS_STATE_DAY		✓		✓							✓	✓	✓					✓	✓							
AG2_INB_V_I_STATE_RSN_SUBHOUR		✓						✓			✓	✓	✓						✓	✓						
AG2_INB_V_I_STATE_RSN_HOUR		✓				✓					✓	✓	✓						✓	✓						
AG2_INB_V_I_STATE_RSN_DAY		✓		✓							✓	✓	✓						✓	✓						
AG2_INB_V_IXN_AGENT_HOUR		✓			✓							✓	✓	✓	✓											✓
AG2_INB_V_IXN_AGENT_DAY		✓	✓									✓	✓	✓	✓											✓
AG2_INB_V_IXN_AGENT_MONTH		✓					✓					✓	✓	✓	✓											✓
AG2_INB_V_IXN_AGENT_GRP_HOUR		✓			✓							✓	✓	✓	✓											✓
AG2_INB_V_IXN_AGENT_GRP_DAY		✓	✓									✓	✓	✓	✓											✓
AG2_INB_V_IXN_AGENT_GRP_MONTH		✓					✓					✓	✓	✓	✓											✓
AG2_INB_V_IXN_ID_HOUR		✓			✓							✓				✓										
AG2_INB_V_IXN_ID_DAY		✓	✓									✓				✓										
AG2_INB_V_IXN_ID_MONTH		✓					✓					✓				✓										
AG2_INB_V_QUEUE_HOUR		✓			✓					✓		✓					✓					✓		✓	✓	
AG2_INB_V_QUEUE_DAY		✓	✓							✓		✓					✓					✓		✓	✓	
AG2_INB_V_QUEUE_MONTH		✓					✓			✓		✓				✓						✓		✓	✓	

Table 1: GIM Options that Affect Content of AG2_* Info Mart Tables (Continued)

Info Mart Table	Configuration Option	abandon-duration-range-[n]-thold*	complex-voice-agent-env	days-to-keep-day-level-disposition-aggregates	days-to-keep-day-level-disposition-aggregates	days-to-keep-hour-level-disposition-aggregates	days-to-keep-hour-level-disposition-aggregates	days-to-keep-month-level-disposition-aggregates	days-to-keep-subhour-level-disposition-aggregates	init-resp-duration-range-[n]-thold	populate-acd-queue-facts	populate-agent-state-interval-aggregates	populate-interaction-resource-facts	populate-ixn-agent-aggregates	populate-ixn-agent-interval-aggregates	populate-ixn-service-type-aggregates	populate-queue-aggregates	populate-sm-resource-session-facts	populate-sm-resource-state-facts	populate-sm-resource-state-reason-facts	populate-sm-voice-resource-activity	populate-virtual-queue-facts	q-answer-threshold-voices	q-short-abandoned-threshold-voice	short-abandon-threshold	short-talk-threshold
AG2_INB_V_QUEUE_ABN_HOUR		✓				✓					✓		✓				✓					✓		✓	✓	
AG2_INB_V_QUEUE_ABN_DAY		✓		✓							✓		✓				✓					✓		✓	✓	
AG2_INB_V_QUEUE_ABN_MONTH		✓						✓			✓		✓				✓					✓		✓	✓	
AG2_INB_V_QUEUE_ANS_HOUR						✓				✓	✓	✓					✓					✓	✓			
AG2_INB_V_QUEUE_ANS_DAY				✓						✓	✓	✓					✓					✓	✓			
AG2_INB_V_QUEUE_ANS_MONTH								✓		✓	✓	✓					✓					✓	✓			
AG2_INB_V_QUEUE_GRP_HOUR			✓			✓					✓	✓					✓							✓	✓	
AG2_INB_V_QUEUE_GRP_DAY			✓	✓							✓	✓					✓							✓	✓	
AG2_INB_V_QUEUE_GRP_MONTH			✓					✓			✓	✓					✓							✓	✓	
INTERACTION_RESOURCE_FACT			✓										✓													
INTERACTION_RESOURCE_STATE_FACT														✓												
MEDIATION_SEGMENT_FACT			✓								✓												✓	✓		
SM_RES_SESSION_FACT			✓															✓								
SM_RES_STATE_FACT			✓															✓	✓							
SM_RES_STATE_REASON_FACT			✓															✓	✓	✓						

* n=01 through 09

Note: There are additional abandon-duration-range-[n]-thold/init-resp-duration-range-[n]-thold configuration options where n=1,2, and 3. Instead of these, the Interactive Insights reports rely on the options where n=01, 02, 03, ...

The settings of the `populate-*-facts` configuration options directly affect whether the GIM Server writes to the `INTERACTION_RESOURCE_FACT`, `INTERACTION_RESOURCE_STATE_FACT`, and `MEDIATION_SEGMENT_FACT` tables. Although these tables are not accessed directly by the Interactive Insights reports, they are nonetheless, prerequisites—in conjunction with the appropriate settings of other configuration options—for the GIM Server to populate the AG2_* tables. Where marked in the table, the settings of these options indirectly affect the noted aggregate tables.

One other option, `sub-hour-level-aggregation`, also has a direct impact on the Interactive Insights reports. This option must be set to 30 minutes for out-of-the-box functionality. The *Genesys Interactive Insights 7.6 User's Guide* describes how to customize the reports for 15-minute subhour aggregation, but this particular configuration is not supported.

Upgrading GIM 7.5

Genesys Info Mart 7.5 customers who want to use Interactive Insights might opt to upgrade an existing Genesys Info Mart 7.5 application to 7.6 in lieu of creating a new application using the `Genesys_Info_Mart_ETL_760_for_GI2.tpl` (GI2) template. The GIM-provided template for Interactive Insights is designed for new installations and as such, turns off a number of configuration options that are not required for Interactive Insights operation—this is to maximize performance. If you require the functionality that is provided by setting these configuration options otherwise (such as those that enable the use of data sourced from Stat Server), then you should specifically review the following configuration options and *not* set them to FALSE, as they are set in the GI2 template:

- `populate-resource-session-facts`
- `populate-resource-state-facts`
- `populate-resource-state-reason-facts`

Genesys Info Mart 7.6 offers many other features that are not used for Interactive Insights. Please review the *Genesys Info Mart 7.6 Deployment Guide* to determine which features you want to set in your environment.

Upgrading GIM 7.6

The latest Genesys Info Mart release offers fields in the `AG2_INB_V_IXN_ID_*`, `AG2_INB_V_IXN_AGENT_*`, and `AG2_INB_V_AGENT_QUEUE_*` aggregation tables that were not present in the initial 7.6 release. Many of these new fields are directly referenced by measures in the new and updated reports that are offered within the latest Interactive Insights release. For instance, the latest *Call Volume* reports reference the `TOTAL_ENTERED_OBJ_COUNT` field in the `AG2_INB_V_IXN_ID_*` tables; and the *Agent Conduct Report* references the `TOTAL_SHORT_TALK_COUNT`, `TOTAL_RONA_COUNT`, and `TOTAL_ABANDONED_RINGING_COUNT` fields in the `AG2_INB_V_IXN_AGENT_*` tables.

- To upgrade your Info Mart 7.6 database to the latest schema, follow the procedure that is documented in the latest *Genesys Info Mart 7.6 Deployment Procedure*.
- To populate these new fields with data that is aggregated from your existing facts for your reporting interval, follow the “Calculating Aggregates within a Time Span” procedure that is described in the *Genesys Info Mart 7.6 Operations Guide*.
- Review your Genesys Info Mart 7.6 application in Configuration Manager to set values for new options.

The `Genesys_Info_Mart_ETL_760_for_GI2.tpl` GIM application template for Interactive Insights was updated to include default settings for the new configuration options that were introduced with each interim GIM 7.6 release. Therefore, if you already have a GIM 7.6 application for use with

Interactive Insights, you should revisit its configuration and apply settings for the newest options. Indeed, you must explicitly set some of these options to operate the Interactive Insights reports that were introduced or updated after the Interactive Insights 7.6.1 release.

The predominant changes to this application template from the initial GIM 7.6 release include the addition of following configuration options:

- `complex-voice-agent-env`
- `extract-user-event-data`
- `short-talk-threshold`
- `user-event-data-timeout`

Refer to the *Genesys Info Mart 7.6 Deployment Guide* for information about the function of each configuration option and its permissible range of values.



Chapter

4

Installing Interactive Insights

If you 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, though, you can also install BOE silently, during the installation of Interactive Insights. This chapter describes this deployment scenario as well. In addition, Interactive Insights requires connection to a 7.6 Info Mart. This database, though not required for Interactive Insights installation, should be regularly populated by a Genesys Info Mart (GIM) 7.6 application. GIM 7.6 should be installed (or upgraded) before you run the Interactive Insights reports.

This chapter contains the following sections:

- [Overview of the Installation Routine, page 40](#)
- [Prerequisites, page 40](#)
- [Backing Up Prior Universes, page 41](#)
- [Installing Interactive Insights on UNIX, page 41](#)
- [Installing on Interactive Insights Windows, page 43](#)
- [Manually Running the Interactive Insights Installation Script, page 45](#)
- [Manually Importing the GI2 Universe, Reports, Users, Groups, and Rights, page 46](#)
- [Viewing the Interactive Insights Reports and Universe, page 50](#)

After you have installed Interactive Insights, perform the additional steps described in Chapter 5, “Setting Up the Universe,” on [page 55](#) to ready the universe for report users.

Overview of the Installation Routine

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

- The installation script and supporting files (including the BOE installation package, if you indicate to install BOE software).
- The SQL script (`make_gi2.sql`) that you must run against each tenant schema within Info Mart from which you intend to run reports to set up needed Interactive Insights views.
- The Interactive Insights universe, folder, and reports into the Business Objects repository.

The installation routine also updates the program registry on Windows platforms.

If, for any reason, the installation exits without installing Interactive Insights successfully 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 9, “Application Files,” on [page 95](#) for the names of the application files that are deployed. This file is only produced if BOE software has been installed.

Prerequisites

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

- BOE XI 3.1 software must 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 21](#) 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 that might be encountered.
- You must have the Genesys Interactive Insights 7.6 installation package (and the BOE installation package for deployment of both applications). Furthermore, the program instance of Interactive Insights cannot already preexist on your host. (Prior versions of the Interactive Insights universe and reports need not be removed.) If the installation routine detects an Interactive Insights program instance, you will be prompted to uninstall it before installing Interactive Insights anew. Refer to Chapter 8, “Uninstalling Interactive Insights,” on [page 91](#) for additional information.

Your operating-system version must comply with a version that is supported both by GIM 7.6 and by BOE XI 3.1:

- Sun SPARC
 - Solaris 2.9, 32- and 64-bit
 - Solaris 2.10, 64-bit
- Red Hat Linux 4.0, 32-bit
- Microsoft Windows Server 2003 (32-bit), with or without SP1
- HP-UX 11.11 (32- and 64-bit) and 11i.v2 (64-bit)
- IBM AIX/Power PC—5.2, 5.3 (32- and 64-bit)

Note: Business Objects may support other versions of these platforms and other platforms altogether. This release of Interactive Insights, however, restricts operating system support to only those platforms that are supported by GIM 7.6.

In addition, before you operate the Interactive Insights reports, you must have access to an Info Mart schema that is populated by GIM 7.6. Refer to the *Genesys Info Mart 7.6 Deployment Guide* (or the *Genesys Migration Guide*) for information that pertains to configuring, installing, and/or upgrading this product. 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 `G12_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 7.6 DVD), locate the `install.sh` shell script.
2. Run this script from the command line by typing: `sh install.sh`
3. When prompted, indicate whether to install BusinessObjects Enterprise XI 3.1 software: `y` or `n`.

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, then you must have the location of BOE software at hand in order to proceed past [Step 7](#).

4. Indicate whether to deploy Interactive Insights: y or n.
5. If you elected to install BOE at [Step 3](#), type the full path of the BOE installation files; otherwise, skip to [Step 7](#). This path cannot contain spaces.
The installation routine verifies the path's existence before proceeding to the next step.
6. Type the provided license key for Business Objects software, including the dashes. This keycode is case insensitive.
7. Type the destination directory of the Business Objects installation. This path cannot contain spaces. Skip to [Step 10](#) if you responded n at [Step 3](#).
This path represents the directory where the installation routine will install the application (if you elected to install Business Objects at [Step 3](#)) or the existing directory where the application has already been installed.
8. Type the CMS port, or accept the default (6400). Skip to [Step 15](#) if you responded n at [Step 3](#).
9. When prompted, do not specify a password for Administrator. Leave the password null. After successful installation, you can set a secure password.
10. Specify the host for the BOE CMS, or accept the default, which is the name of the local machine.
The host name you specify cannot contain dashes (–) or periods (.). Go back to [Step 8](#), if you responded n at [Step 3](#).
11. Type the port for the BOE Intelligence Agent, or accept the default (6410).
12. 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.

13. Type a name for the CMS auditing database, or accept the default (BOE120_AUDIT).
14. Type the port for the CMS MySQL database, or accept the default (3306).
15. Type the password of the CMS MySQL database administrator. Skip to [Step 22](#), if you responded n at [Step 3](#).
16. Type the user name for a CMS MySQL database nonadministrative user, or accept the default (sa). This user represents the CMS database owner.

17. Type the password of the CMS MySQL database user from [Step 16](#).
18. 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 Info Mart to Business Objects. Business Objects, however, accepts other application servers when the software is deployed apart from Interactive Insights.

19. Type the redirect port for Tomcat, or accept the default (8443).
20. Type the shutdown port for Tomcat, or accept the default (8005).
21. Type the BOE installation type: 1 for user, 2 for system. The system installation type enables the BOE servers to automatically start and stop when the UNIX server is brought up or shut down.
22. 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 5](#) and [22](#), 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 45](#).

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

See Chapter 9, “Application Files,” on [page 95](#) for a description of the files that are deployed. After successful installation, Genesys recommends that you edit the `gi2_setenv.sh` and `biar.properties` files to remove the password if you are concerned about security.

Installing on Interactive Insights Windows

1. From the Genesys Interactive Insights 7.6 CD (or image), double-click `setup.exe`.

The installation routine checks the Windows registry for an existing Interactive Insights installation before it displays the `Welcome` page. Installation ceases if another Interactive Insights installation is detected.

2. At the `Welcome` page, click `Next`.
3. At the `Select Options` page, choose to install either or both of the following:

- Business Objects
- Interactive Insights

Then, click `Next`.

Note: The installation routine forces selection of the `Install Business Objects` option if it detects no such installation on the local host.

If you elected only to install Interactive Insights, skip to [Step 10](#).

4. At the `BusinessObjects Enterprise Product Key` page, enter the product keycode, and click `Next`. This keycode is case insensitive and includes dashes.
5. 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.
6. 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.

7. 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 you specify cannot contain dashes (–) or periods (.).
 - SIA Port (`6410`)
 - Tomcat HTTP Connection Port (`8080`)
 - Tomcat Redirect Port (`8443`)
 - Tomcat Shutdown Port (`8005`)
8. At the `Choose BusinessObjects Enterprise (BOE) XI Location` page, enter the full path for the BOE installation, and click `Next`.
9. At the `Choose BusinessObjects Enterprise (BOE) XI Installation Program Location` page, enter the folder where the BOE installation files exist, and click `Next`.
10. 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`

11. 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 8 and 10](#); 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](#).

12. 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 9, “Application Files,” on [page 95](#), for a description of the files that are deployed. After successful installation, Genesys recommends that you edit the `gi2_setenv.bat` and `biar.properties` files 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.
- You want to reimport the universe, folder and/or reports to your environment.

Note: Before re-importation, be sure to delete the Interactive Insights universe, folder, connection, user groups, and default users (that is, perform [Step 3](#) on [page 92](#)).

- The installation of Interactive Insights was unsuccessful by using the Genesys Installation Wizard. If so:

- Verify that the prerequisites, which are listed on [page 40](#), are met.
- Locate the error in the log file (`deploy_unv_rep.log`) that is produced. This file may instead indicate where installation routine halted.
- 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 23](#).

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

- To deploy the Interactive Insights universe and reports, run the `deploy_unv_rep.bat` batch script.
- To deploy the Interactive Insights users, user groups, and permissions, run the `gi2_deploy_sec.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` and `biar.properties` files to remove the password, if you are concerned about security.

Manually Importing the GI2 Universe, Reports, 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 7.6 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 7](#), 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

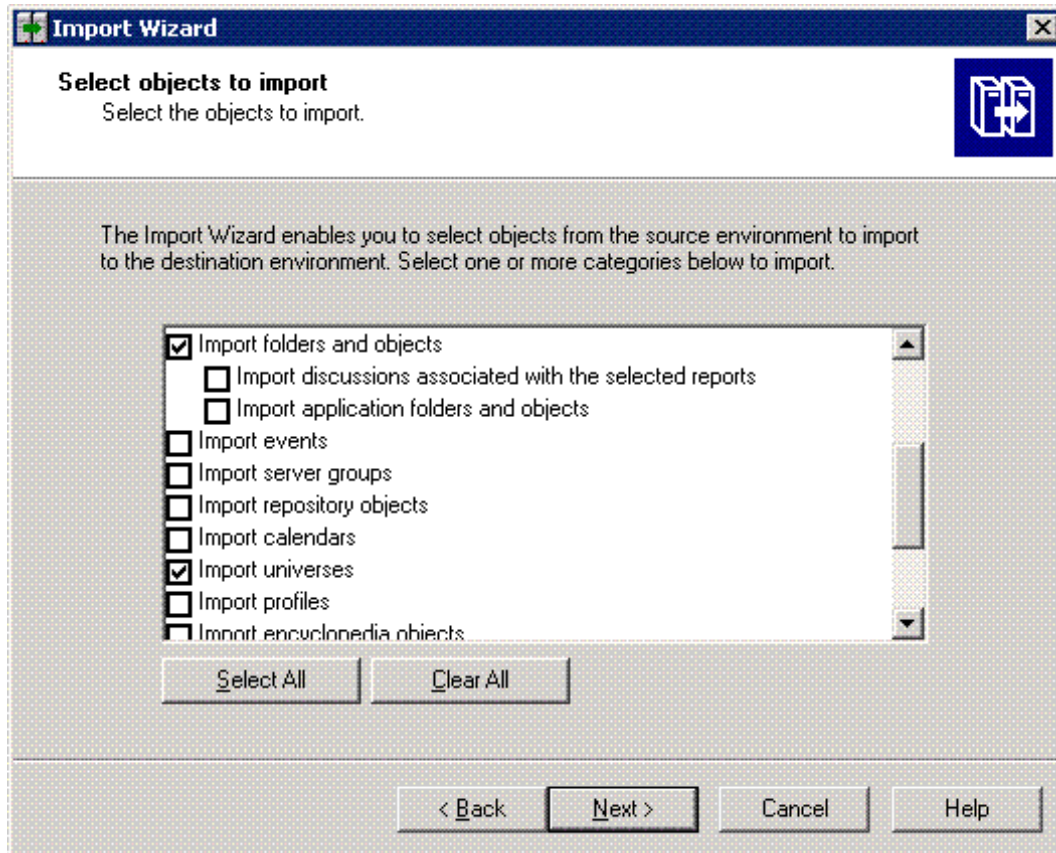


Figure 7: Cutaway of the Select Objects to Import Page of the Import Wizard

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 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 Folders and objects page, select the Interactive Insights folder, and click Next. If you do not want to import all of the Interactive Insights reports or Interactive Insights documentation, open this folder and clear the corresponding report box(es):
 - Agents

- Business Results
- Documentation
- Interaction Details
- Queues

11. At the Select application folders and objects page, click Next.
12. 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.

13. At the Import options for publications page, select Do not import recipients, and click Next.
14. At the A note on importing reports page, click Next.
15. 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.
16. When the import completes, click Done.

Universe Contents

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

- Six folders—Interactive Insights with the following subfolders inside a numbered release folder: Agents, Business Results, Documentation, Interaction Details, and Queues.
 - The Agents, Business Results, Interaction Details, and Queues folders contain reports.
 - The Documentation folder contains the *Genesys Interactive Insights 7.6 Universe Guide* and the *Genesys Interactive Insights 7.6 User's Guide*.
- Twenty-six objects—The Interactive Insights reports. (Please refer to the *Genesys Interactive Insights 7.6 Universe Guide* for a complete listing and description of these reports.)
- One universe—Named GI2_Universe.
- One connection—Named GI2_GIM_DB.

The connection is irrelevant to your environment, and you can safely ignore this element. You can invoke the BusinessObjects' Central Management Console to verify that these elements have been deployed (under Connections, Folders, and Universes). The Insights.biar file also contains nearly 300 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, “Viewing the Interactive Insights Reports and Universe” on [page 50](#), 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

Once 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 you selected during installation are present. Keep in mind, however, that additional setup is required to actively use the report and universe elements. The additional steps for setting up the environment are described in [Chapter 5](#) beginning on [page 55](#).

Viewing the Universe

[Figure 8](#) shows a cutaway of the Interactive Insights universe in Designer.

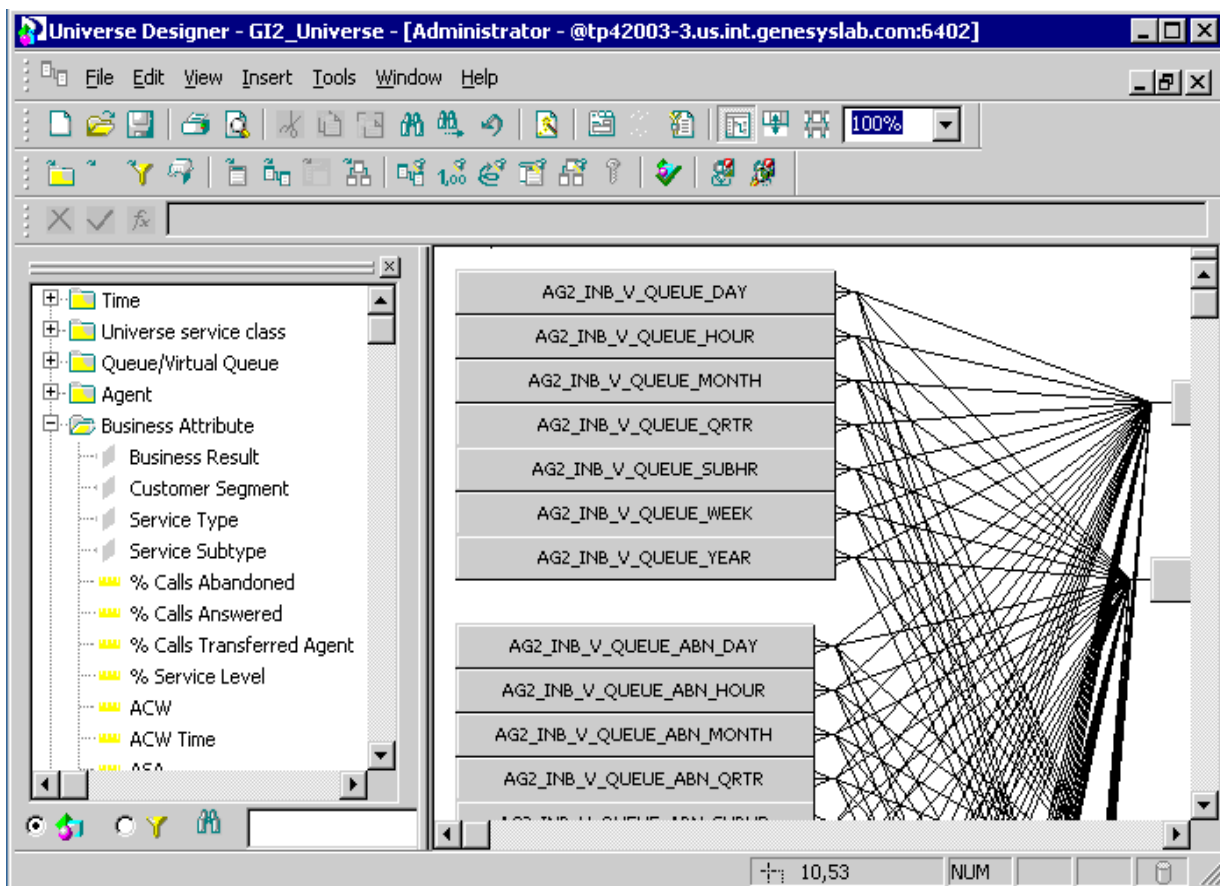


Figure 8: The Interactive Insights Universe in Designer

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

Viewing the Interactive Insights Reports

Figure 9 shows the Interactive Insights folder, its subfolders, and some of the queue-based Interactive Insights reports in InfoView when expanded. The Documentation folder contains the *Genesys Interactive Insights 7.6 Universe Guide* and the *Genesys Interactive Insights 7.6 User's Guide*. If you manually imported the universe, the reports provided within the Agents, Business Results, Interaction Details, and Queues subfolders will be dependent on the selections you made (Step 10 on page 48) during importation; otherwise, if the installation routine imported the universe and reports, all of the reports will be imported to the repository.

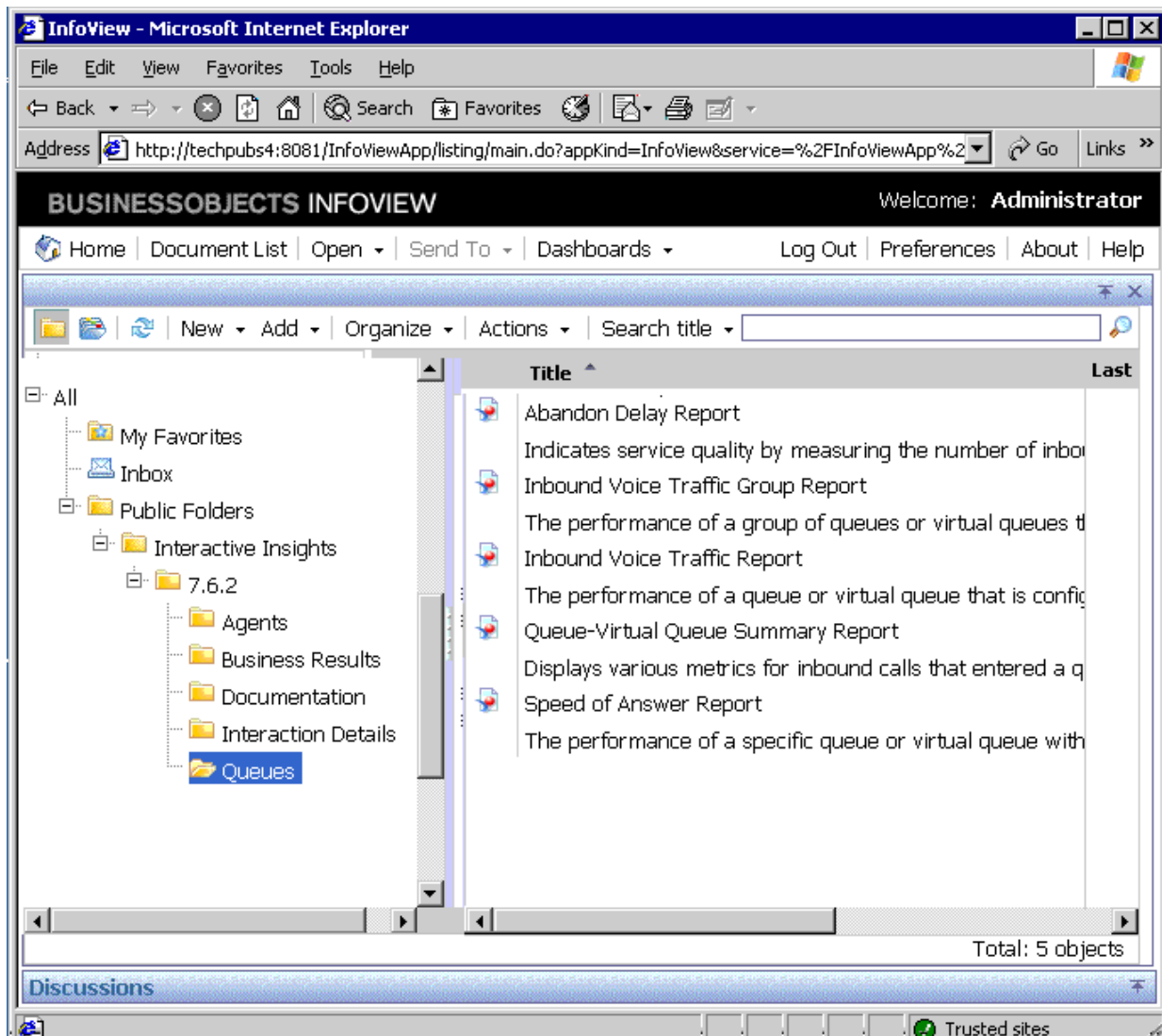


Figure 9: The Interactive Insights Reports in InfoView

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 Interactive Insights houses the Agents, Business Results, Documentation, Interaction Details, and Queues 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.

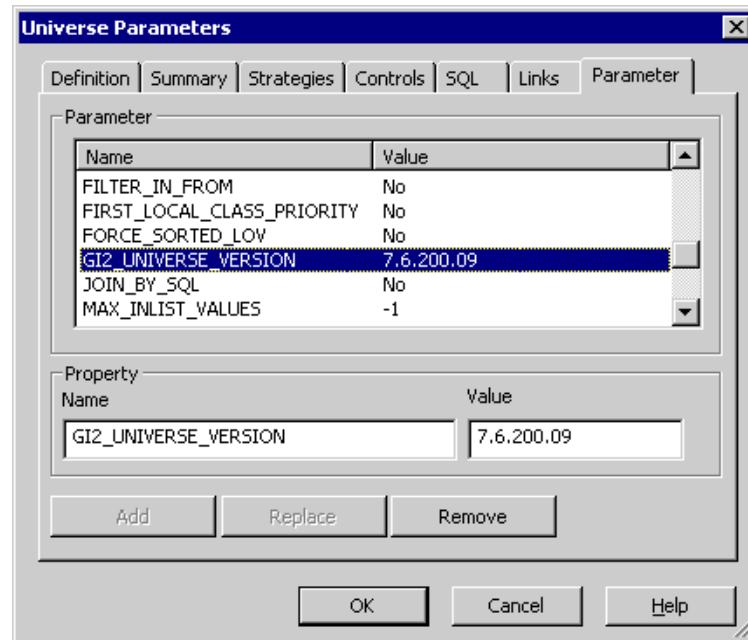
Interactive Insights Versioning

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 10](#), is accessed within Designer from the **File > Parameters** menu. Genesys recommends that you do 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 10: 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 11](#)). Genesys recommends that you do not change its value.

Agent Conduct Report

Report Description

Displays agent's behaviour in handling calls and compare the agent's performance with the agent group's.

Metrics Description

Metrics Name	Description
Calls Inbound	The total number of times that inbound calls, assigned a business attribute, were answered by this agent.
Consult Calls	The total number of times this agent received and answered consult calls where the consultations were associated with inbound calls assigned a business attribute.
Calls Short Talk	The total number of times that inbound interactions, assigned a business attribute, were answered by an agent and released or transferred within the threshold defined by the short-talk-threshold GIM configuration option.
■ ■ ■	
Avg ACW Time	The description of this measure is dependent on the universe elements by which this measure is dimensioned: <ul style="list-style-type: none">• Agent Dimension: The average amount of time, in seconds, spent by this agent on inbound calls while in ACW state.• Agent Group Dimension: The average amount of time, in seconds, spent by agents belonging to this agent group on inbound calls while in ACW state.

Interactive Insights Report Version: 7.6.200.09



Figure 11: Report Version Is Visible on the Description Tab of the Report

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



Chapter

5

Setting Up the Universe

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

- [Deploying Utility Views Specific to Interactive Insights, page 55.](#)
- [Linking the Universe to Info Mart, page 56.](#)
- [Manually Setting Up Interactive Insights User Groups, page 61.](#)
- [Setting Data-Access Restrictions for Multi-Tenant Environments, page 74.](#)
- [Customizing Measure Definitions, page 78.](#)

Deploying Utility Views Specific to Interactive Insights

After you have installed Interactive Insights, you must run the `make_gi2.sql` script to set up the necessary views that facilitate date processing for the Interactive Insights reports. To deploy these views in Genesys Info Mart:

1. From the `Interactive Insights\sql_scripts` folder, select the appropriate subfolder for your RDBMS.
2. Run the `make_gi2.sql` script against your Info Mart 7.6 database.
3. Verify that the script executed successfully by checking the script's output for error. Ignore any errors about dropping nonexistent tables and/or nonexistent views.

For environments containing more than one tenant, repeat these steps for each tenant schema in your Info Mart 7.6 application, including the `Environment` tenant. You will have to log in to the Info Mart specifying the appropriate tenant user name before running the script each time.

Linking the Universe to Info 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 pre-connected to your specific Info Mart out of the box. You must define such a connection and assign it within Designer so that the reports referencing these measures will pull contact center data from your Info 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 12](#) shows the 7.6.2 folder selected for the *techpubs4* host at this dialog box.
7. Select the GI2_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 78](#) and “Exporting the Universe Back to the Repository” on [page 60](#) for further information.

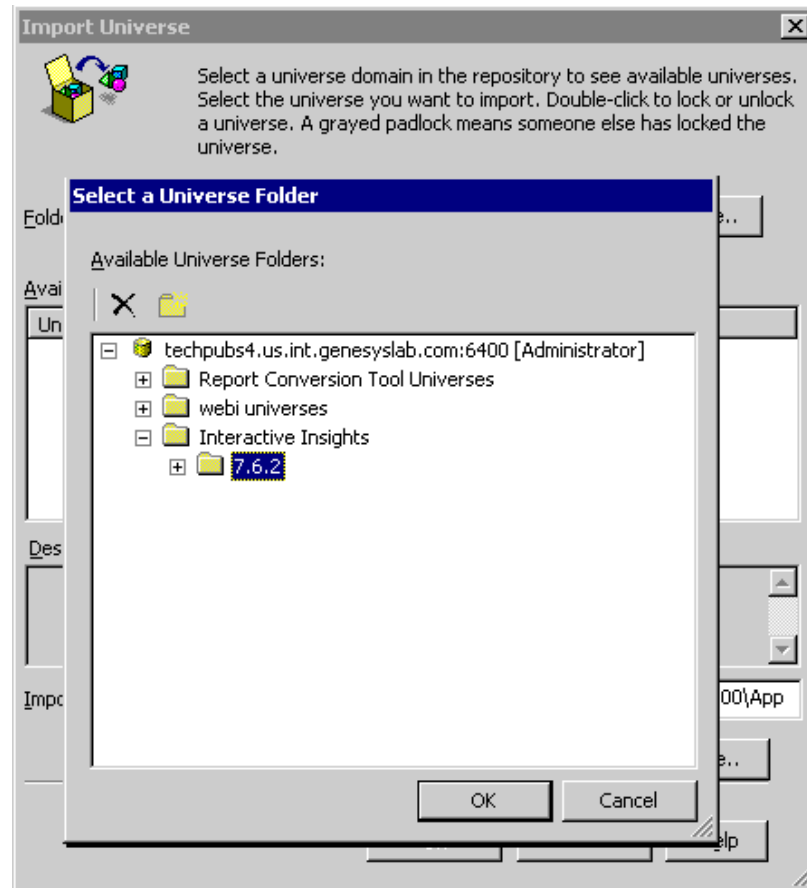


Figure 12: The Root Folder of the BOE Repository

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 may 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 your Info Mart RDBMS type, and click Next. [Figure 13](#) shows illustrates the creation of the TechPubs4 connection.

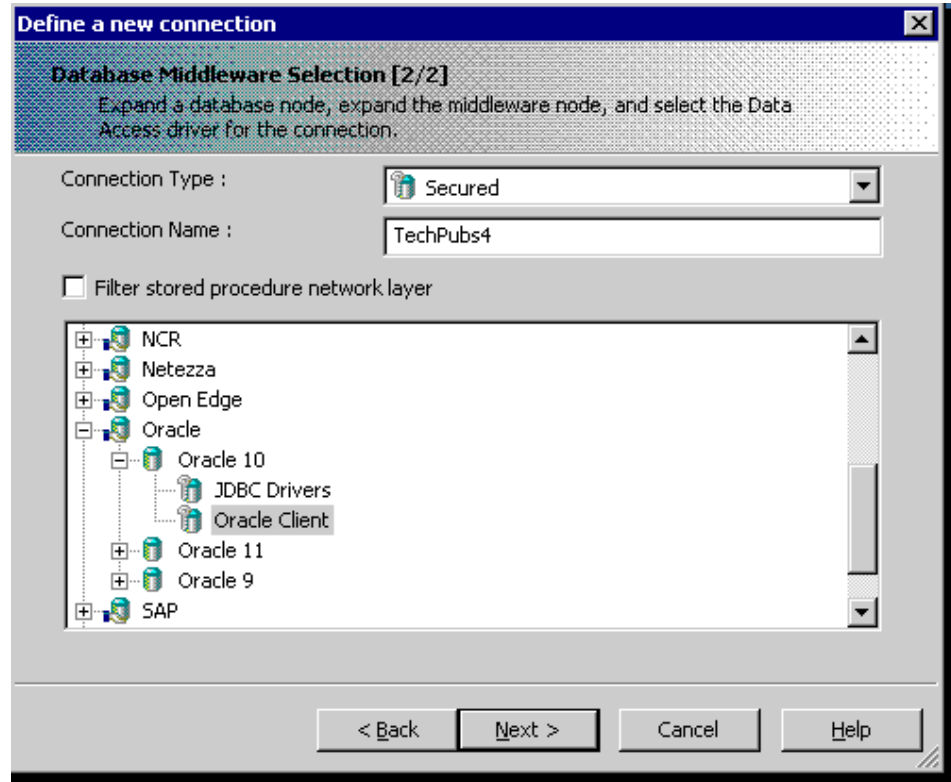


Figure 13: Defining an Oracle Client Connection

5. At the Login Parameters page, specify the connectivity parameters to the desired database schema of your Info Mart and click Next.

The parameters that you specify may be to the GIM 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 Info 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.

8. For multi-tenant environments where 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 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 Info Mart”](#) and [“Exporting the Universe Back to the Repository”](#) sections that follow.

Connecting to Info Mart

If you created a connection from [“Defining a New Connection”](#) above or already have defined a connection to your Info Mart, use it to connect the Interactive Insights universe to Info Mart:

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 GIM owner’s schema in order to view the results from multiple tenants in one report.

[Figure 14](#) shows a user selecting the **TechPubs4** connection, which was created earlier under [“Defining a New Connection”](#) ([Step 4 on page 57](#)).

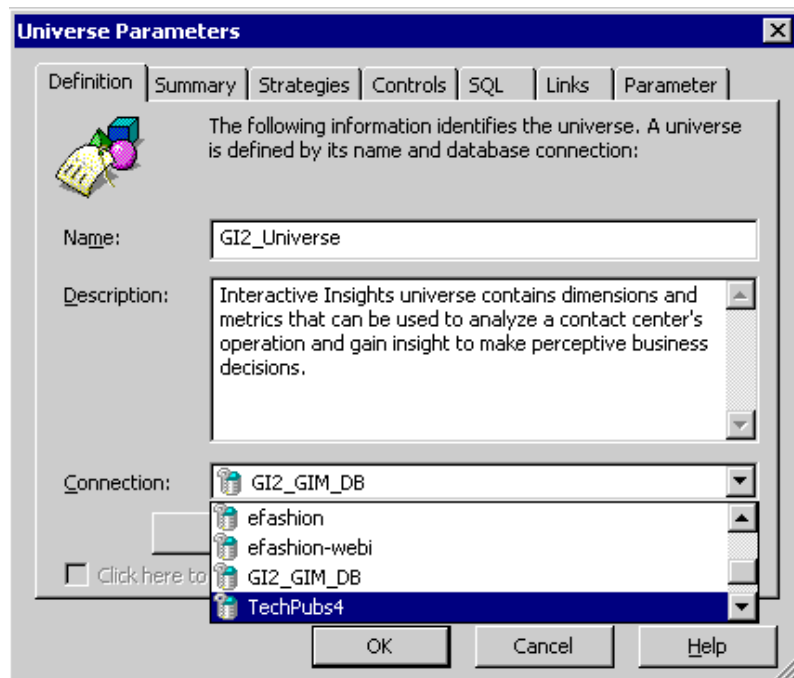


Figure 14: Setting the Connection

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 15](#).
2. From the Groups frame, select all of the groups to which this connection applies.
3. From the Universes frame, select GI2_Universe, and click OK.

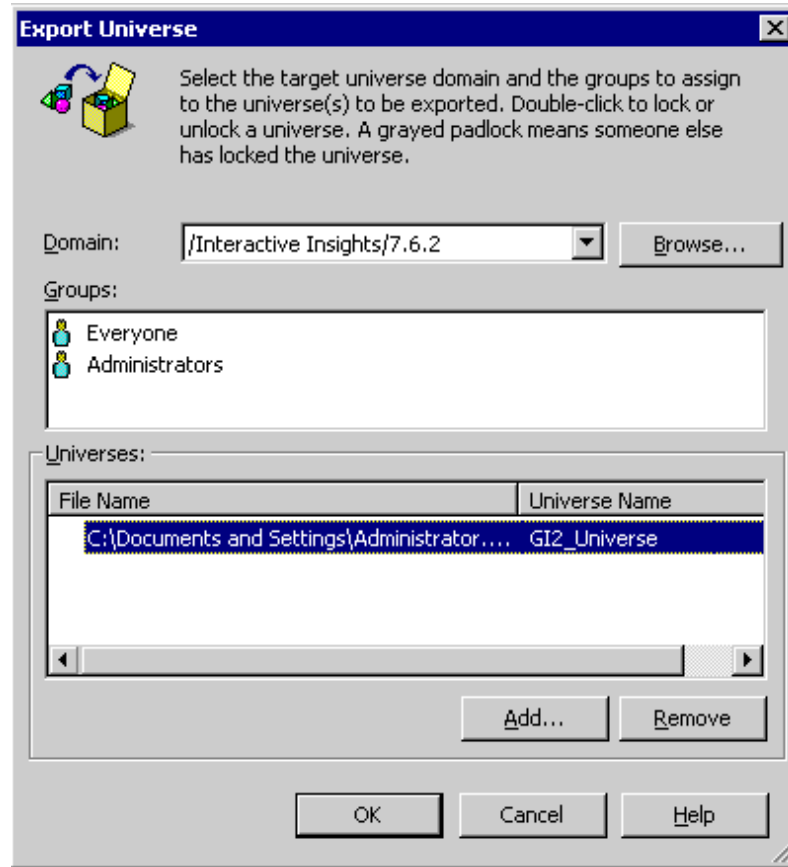


Figure 15: Exporting Changes Back to the Repository

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

Manually Setting Up Interactive Insights User Groups

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 manually import these objects or change their permissions, 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 Universe, Reports, Users, Groups, and Rights” on [page 46](#)), or create the objects yourself from scratch and assign permissions to various objects by following the instructions in these sections:

- “Creating Interactive Insights Groups” on [page 63](#)
- “Hiding Unused Folders” on [page 63](#)
- “Setting Interactive Insights Group Permissions for Connections” on [page 65](#)
- “Setting Interactive Insights Group Permissions for Universes” on [page 67](#)
- “Setting Interactive Insights Group Permissions for Folders” on [page 68](#)
- “Setting Interactive Insights Group Permissions for Applications” on [page 70](#)

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 92](#)).

After importation, you can view the Interactive Insights users and groups in CMC. [Figure 16](#) shows the added groups.

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

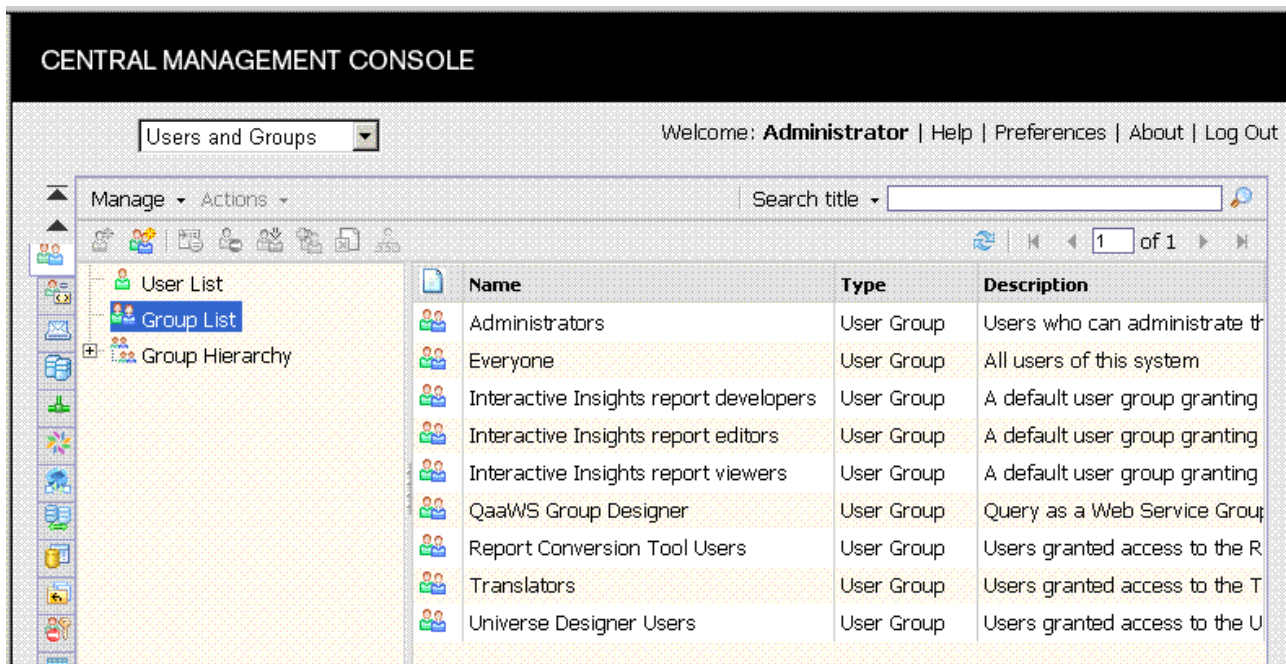


Figure 16: Viewing the Default BOE and Interactive Insights Groups in CMC

Creating Interactive Insights Groups

If you opt not run the Import Wizard to deploy the Interactive Insights report groups (explained beginning on [page 46](#)), as the administrative user within the Central Management Console, you can create them manually and assign rights as follows:

1. Select the Users and Groups section and right-click New Group.
2. At the Create New User Group page, type the following and 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 Groups radio button.
6. From the Available users/groups list box, select Interactive Insights report developers, and move it to the Selected users/groups list box.
7. Click the Add and Assign Security button.
8. On the Assign Security page, under the Access Levels tab, select View on Demand from the Available Access Levels list, and move it to the Assigned Access Levels list. Click OK.
CMC returns to the User Security properties of Users and Groups where your new group appears.
9. Repeat [Steps 2–8](#) to create the Interactive Insights report editors and Interactive Insights report viewers groups. Instead of View on Demand access, grant these groups View access on the Access Levels tab of the Assign Security page.
10. Click Close to close the user security properties.

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 17](#).

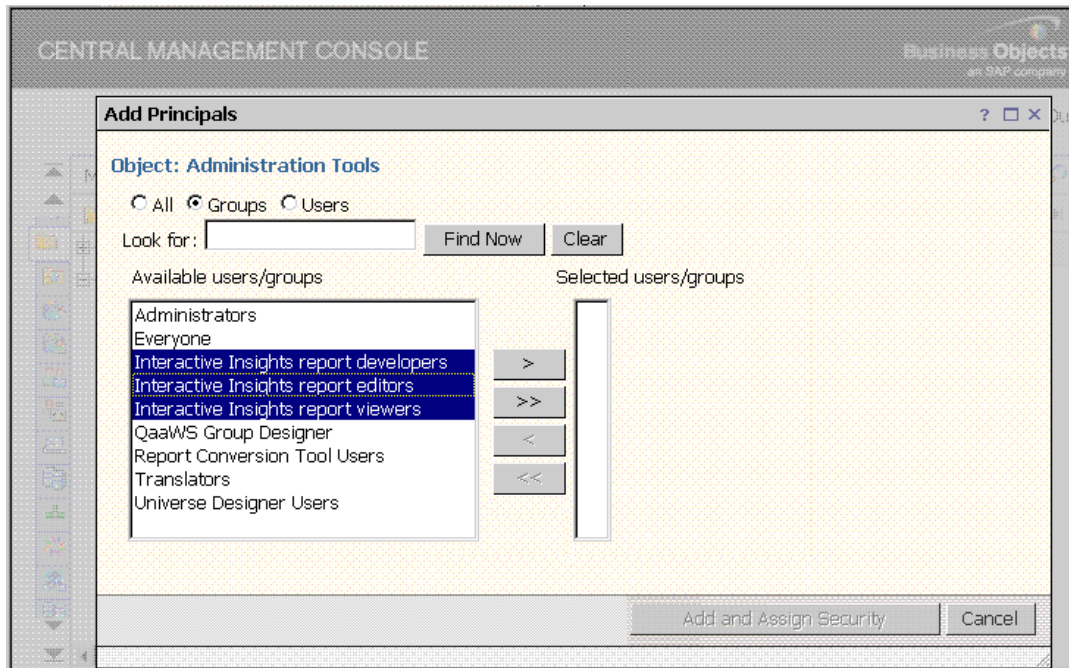


Figure 17: Adding Principals to a Folder's Security Profile

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 18](#).

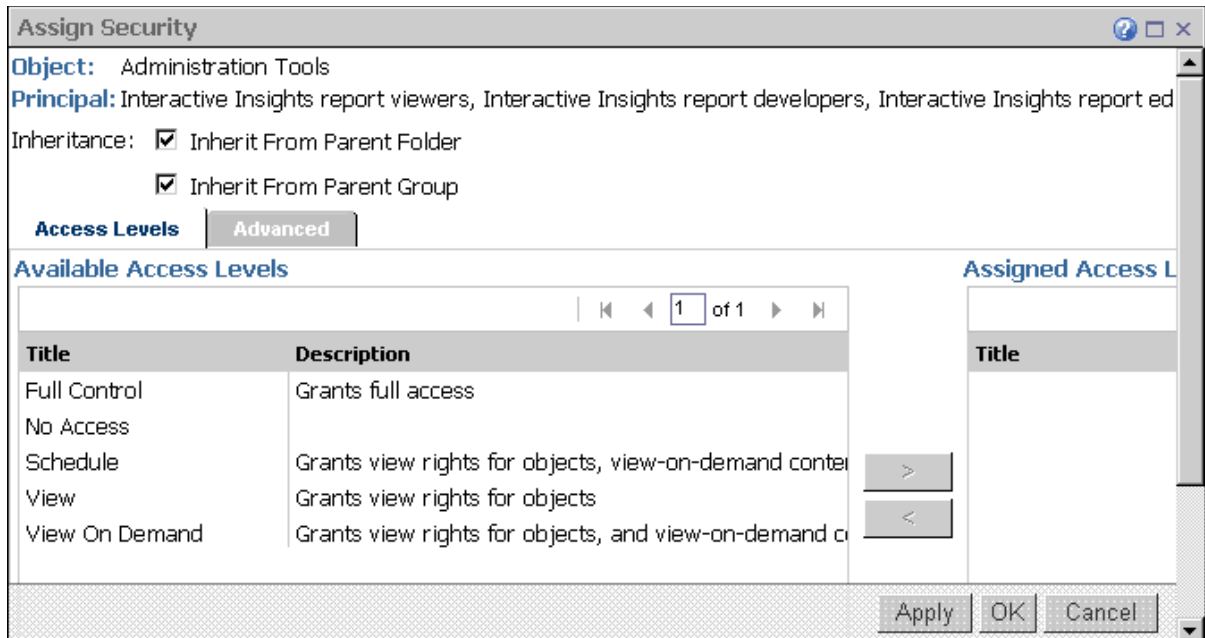


Figure 18: Assigning Access Levels to Folders for Selected Principals

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, displaying 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 Interactive Insights Group Permissions for Connections

The Interactive Insights installation routine deploys a `G12_GIM_DB` connection that is reserved for Genesys use. You might want to hide this connection from users, to avoid confusion. On the contrary, you should explicitly expose other connections that you create ([page 57](#)) to the Interactive Insights report groups. Doing so will grant read-only access to the data that is in your Info Mart.

To enable access to the users in the Interactive Insights report groups, as the administrative user within Central Management Console, under the **Connections** section, perform the following steps for each connection:

1. Right-click the desired connection, 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 three Interactive Insights user groups, and move them to the Selected users/groups list box.
4. Click the Add and Assign Security button, and clear the Inherit From Parent Folder and Inherit From Parent Group boxes. Apply your changes.
 - a. Under the Access Levels tab, select View on Demand from the Available Access Levels list, and move it to the Assigned Access Levels list. Apply your changes.
 - b. Under the Advanced tab, click Add/Remove Rights. The Add/Remove Rights page appears, as shown in [Figure 19](#).

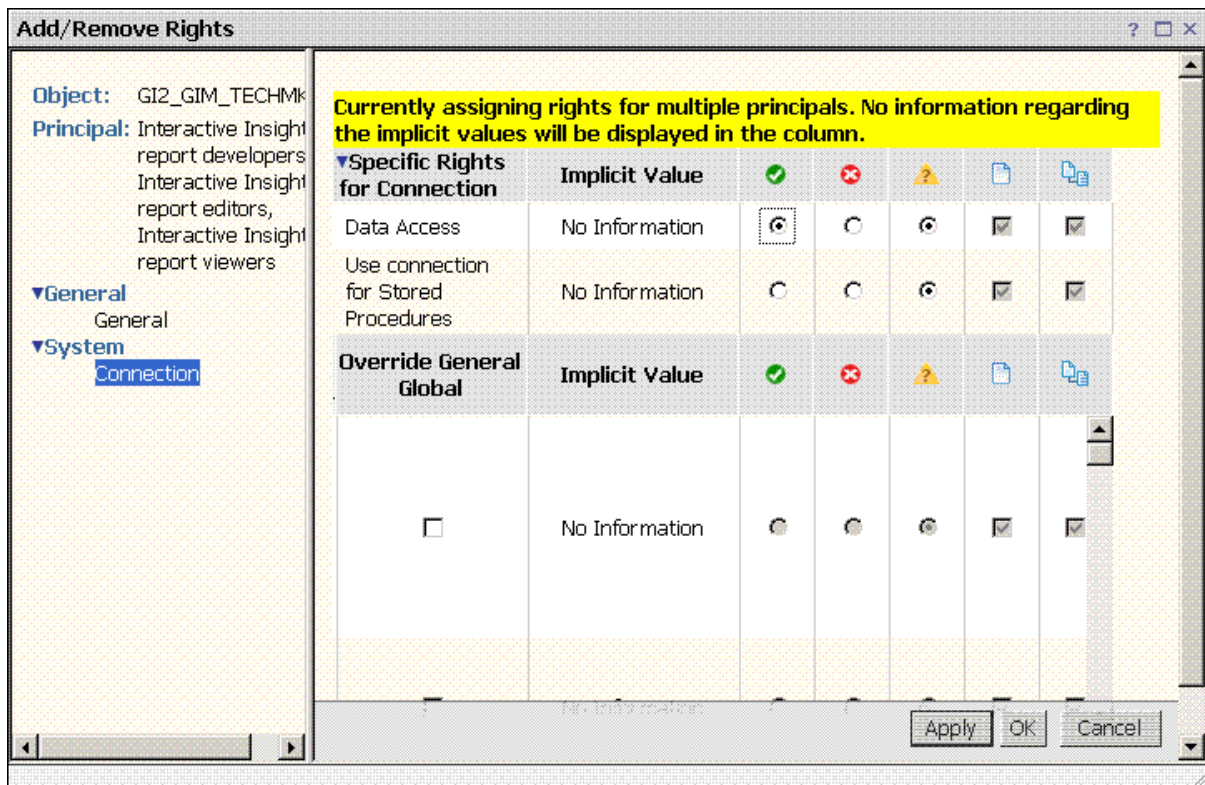


Figure 19: Granting Data Access Rights to Interactive Insights Users

- c. In the left pane, under the System section, select Connection; then, in the right pane, mark Data Access. Click OK.

CMC returns to the Assign Security page and shows that the granted right has been assigned.
 - d. Click OK.
 5. Click Close to close the user security properties.
- With these changes applied to each connection, connections will now be available to all Interactive Insights users.

Setting Interactive Insights Group Permissions for Universes

The Interactive Insights installation routine deploys the `GI2_Universe` universe. This object stores the classes, measures, dimensions, filters, and so forth that used by the Interactive Insights reports. You should explicitly expose this universe, with varying levels of access, to users in the Interactive Insights report groups.

To enable access, as the administrative user within the Central Management Console, under the Universes section, perform the following steps:

*Setting
GI2_Universe
Access for
Report Developers*

1. Right-click `GI2_Universe` 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 `Interactive Insights report developers`, and move it to the `Selected users/groups` list box.
4. Click the `Add and Assign Security` button, and clear the `Inherit From Parent Folder` and `Inherit From Parent Group` boxes. Apply your changes.
5. Under the `Access Levels` tab, select `Full Control` from the `Available Access Levels` list, and move it to the `Assigned Access Levels` list. Click `OK`.

CMC returns to the `User Security` properties page where it displays that full control has been granted to the Interactive Insights report developers.

*Setting
GI2_Universe
Access for Report
Editors and Viewers*

6. Click the `Add Principals` button, and mark the `Groups` radio button.
7. From the `Available users/groups` list box, select `Interactive Insights report editors` and `Interactive Insights report editors`, and move them to the `Selected users/groups` list box.
8. Click the `Add and Assign Security` button, and clear the `Inherit From Parent Folder` and `Inherit From Parent Group` boxes. Apply your changes.
 - a. Under the `Access Levels` tab, select `View on Demand` from the `Available Access Levels` list, and move it to the `Assigned Access Levels` list. Apply your changes.
 - b. Under the `Advanced` tab, click `Add/Remove Rights`.
 - c. In the left pane of the `Add/Remove Rights` page, under the `System` section, select `Universe`.
 - d. In the right pane, grant the following rights, and click `OK`:
 - `Data Access`
 - `Create and Edit Queries Based on Universe`

CMC returns to the `Assign Security` page, and displays the rights that have been granted.

- e. Click `OK`.
9. Click `Close` to close the user security properties for the universe.

In addition, you should set permissions on the `Universes` folder itself to enable report developers to create and save new universes. To enable this access, as

the administrative user within Central Management Console, under the Universes section, perform the following steps:

Setting Universe Folder Access for Report Developers

1. Right-click the Universes folder, and select Properties, and then User Security.
2. Click the Add Principals button, and mark the Groups radio button.
3. From the Available users/groups list box, select Interactive Insights report developers, and move it to the Selected users/groups list box.
4. Click the Add and Assign Security button, and clear the Inherit From Parent Folder and Inherit From Parent Group boxes. Apply your changes.
5. Under the Access Levels tab, select Full Control from the Available Access Levels list, and move it to the Assigned Access Levels list. Click OK.

Setting Interactive Insights Group Permissions for Folders

The Interactive Insights installation routine deploys an Interactive Insights folder with subfolders containing Interactive Insights reports and documentation. In order for Interactive Insights report users to access the contents of these folders, you must grant them permission.

To enable access, as the administrative user within Central Management Console, under the Folders section, perform the following steps:

Setting “All Folders” Permissions

1. Right-click All Folders and select User Security.
2. Click Add Principals and mark the Groups radio button.
3. From the Available users/groups list box, select the three Interactive Insights user groups, and move them to the Selected users/groups list box.
4. Click the Add and Assign Security button, and clear the Inherit From Parent Folder and Inherit From Parent Group boxes. Apply your changes.
5. Under the Access Levels tab, select View from the Available Access Levels list, and move it to the Assigned Access Levels list. Click OK.
6. Expand All Folders to display the full listing of folders.

Setting Developer Permissions for the Interactive Insights Folder

7. Right-click Interactive Insights and select User Security.
8. Click Add Principals and mark the Groups radio button.
9. From the Available users/groups list box, select the Interactive Insights report developers group, and move it to the Selected users/groups list box.

10. Click the Add and Assign Security button, and clear the Inherit From Parent Folder and Inherit From Parent Group boxes. Apply your changes.
 - a. Under the Access Levels tab, select View on Demand from the Available Access Levels list, and move it to the Assigned Access Levels list. Apply your changes.
 - b. Under the Advanced tab, click Add/Remove Rights. The Add/Remove Rights page appears.
 - c. Grant the rights listed in [Table 2](#) that are appropriate for a report developer, and click OK.
CMC returns to the Assign Security page, and shows that the rights that have been granted.
 - d. Click OK.

*Setting Editor
Permissions for the
Interactive Insights
Folder*

11. Repeat [Steps 8–10](#) specifying Interactive Insights report editors at [Step 9](#) and granting the rights that are appropriate for this group at [Step 10c](#).

*Setting Viewer
Permissions for the
Interactive Insights
Folder*

12. Repeat [Steps 8–10](#) specifying Interactive Insights report viewers at [Step 9](#), the View access level at [Step 10a](#), and granting the rights that are appropriate for this group at [Step 10c](#).

Note: If your report viewers should be enabled to send documents from BOE to other users using the Send To menu, then you will also have to grant them the following three rights:

- Edit Objects
- Reschedule instances
- Schedule to destinations

With this configuration, viewers will be able to edit objects, but they won't be able to save the changes, copy them elsewhere, or create new objects.

13. Click Close to close the user-security properties for the Interactive Insights folder.

Table 2: Matrix of Folder Rights to Interactive Insights Report Users^a

Section	Granted Right	Interactive Insights Report...		
		Developers	Editors	Viewers
General	Add objects to folders that the user owns	✓	✓	
	Add objects to the folder	✓	✓	
	Copy objects that the user owns to another folder	✓	✓	
	Delete objects	✓		
	Delete objects that the user owns	✓		
	Delete instances	✓		
	Edit objects	✓	✓	
	Edit objects that the user owns			✓
	Modify the rights users have to objects	✓		
	Schedule document to run			✓
	View objects			✓
Content: Web Intelligence Report	Edit Query	✓		
	View SQL	✓		
	Export the report's data		✓	✓
	Refresh List of Values		✓	✓
	Refresh the report's data		✓	✓
	Save as CSV		✓	✓
	Save as excel		✓	✓
	Save as PDF		✓	✓
	Use Lists of Values		✓	✓

a. This table lists explicitly granted rights. The Developer and Editor groups may also possess rights that are inherited from View on Demand permission. These rights are not reflected in this table.

Setting Interactive Insights Group Permissions for Applications

In addition to assigning folder, connection, and universe permissions, you should define also which of the Interactive Insights report users have permission to use the Designer, InfoView, and Web Intelligence applications. This is to further control a user's ability to effect a report's outcome by using means other than those that are provided by user prompts in each report.

To define access for the Interactive Insights report users, as the administrative user within the Central Management Console, under the Applications section, perform the following steps:

Setting Access to Designer—for Developers Only

1. Right-click Designer, and select User Security.
2. Click Add Principals, and mark the Groups radio button.
3. From the Available users/groups list box, select Interactive Insights report developers, and move it to the Selected users/groups list box.
4. Click the Add and Assign Security button.
5. On the Assign Security page, clear the Inherit From Parent Folder and Inherit From Parent Group boxes, and click Apply.
6. Under the Access Levels tab, select Full control from the Available Access Levels list, and move it to the Assigned Access Levels list. Click OK.
7. Click Close.

Setting Access to InfoView—for All Users

8. Right-click InfoView, and select User Security.
9. Click Add Principals, and mark the Groups radio button.
10. From the Available users/groups list box, select the three Interactive Insights user groups, and move them to the Selected users/groups list box.
11. Click the Add and Assign Security button, and clear the Inherit From Parent Folder and Inherit From Parent Group boxes. Click Apply.
12. Under the Access Levels tab, select View On Demand from the Available Access Levels list, and move it to the Assigned Access Levels list. Click OK, and then click Close.

Setting Access to Web Intelligence—for Developers

13. Right-click Web Intelligence and select User Security.
14. Click Add Principals and mark the Groups radio button.
15. From the Available users/groups list box, select the Interactive Insights report developers group, and move it to the Selected users/groups list box.
16. Click the Add and Assign Security button, and clear the Inherit From Parent Folder and Inherit From Parent Group boxes. Click Apply.
17. Under the Access Levels tab, select Full control from the Available Access Levels list, and move it to the Assigned Access Levels list. Click OK.

Setting Access to Web Intelligence—for Editors

18. From the User Security page of the Web Intelligence application, click Add Principals, and mark the Groups radio button.
19. From the Available users/groups list box, select the Interactive Insights report editors group, and move it to the Selected users/groups list box.

20. Click the Add and Assign Security button, and clear the Inherit From Parent Folder and Inherit From Parent Group boxes. Click Apply.
 - a. Under the Access Levels tab, select View On Demand from the Available Access Levels list, and move it to the Assigned Access Levels list. Apply your changes.
 - b. Under the Advanced tab, click Add/Remove Rights.
 - c. On the Add/Remove Rights page, grant the rights that are listed in [Table 3](#) that are appropriate for a report editor, and click OK.
CMC returns to the Assign Security page, and shows the rights that you have granted.
 - d. Click OK.

Table 3: Matrix of Granted, WebI Rights to Interactive Insights Report Users

Section	Granted Right	Interactive Insights Report...	
		Editors	Viewers
General	Edit this object	✓	
Web Intelligence	Enable drill mode	✓	✓
	Enable HTML Report Panel	✓	
	Extend scope of analysis	✓	✓

*Setting Access to
Web Intelligence
—for Viewers*

21. From the User Security page of the Web Intelligence application, click Add Principals and mark the Groups radio button.
22. From the Available users/groups list box, select the Interactive Insights report viewers group, and move it to the Selected users/groups list box.
23. Click the Add and Assign Security button, and clear the Inherit From Parent Folder and Inherit From Parent Group boxes. Click Apply.
 - a. Under the Access Levels tab, select View from the Available Access Levels list, and move it to the Assigned Access Levels list. Apply your changes.
 - b. Under the Advanced tab, click Add/Remove Rights.
 - c. On the Add/Remove Rights page, grant the rights that are appropriate for a report viewer that are listed in [Table 3](#).
 - d. On this page, deny the rights that are listed in [Table 4](#), and click OK.
CMC returns to the Assign Security page, and shows the rights that you have granted and denied.
 - e. Click OK.
24. Click Close to close the user security properties for the applications.

Table 4: WebI Rights to Deny to GI2 Report Viewers

Denied Right
Data Tracking: Enable for users
Data Tracking: Enable format display changes by users
Enable formula and variable creation
Enable HTML Report Panel
Enable interactive HTML viewing (if license permits)
Enable Java Report Panel
Enable Query – HTML
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 alerters
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: Allow local data providers
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: Save a document locally on the file system
Web Intelligence Rich Client: Send by mail

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 an Info Mart database 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 only see the data pertinent to that tenant.

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 Info Mart 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:

- Consistency in measure definitions across the enterprise.
- Reduced maintenance costs—having to manage one only 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 7.6 documentation set for further information.

One possible configuration, however, is particularly noteworthy for an 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 Tenant Users and Groups

The steps that are provided on [page 61](#) describe the procedures for creating Interactive Insights users and groups, defining their access permissions, and assigning users and groups to various repository elements. The naming convention that is used for the users and groups and the presentation of the steps were slanted 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:
 - “Deploying Utility Views Specific to Interactive Insights” on [page 55](#)
 - “Linking the Universe to Info Mart” on [page 56](#)

Note: When you are naming data-source connections ([Step 4, page 57](#)), consider choosing tenant-identifying names, such as *Tenant1 Connection* or *GI2_Tenant1_Oracle10g*.

2. To set up users and groups for your tenants, follow the steps that are provided in “Manually Setting Up Interactive Insights User Groups” on [page 61](#)—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 65](#)) 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 20](#).

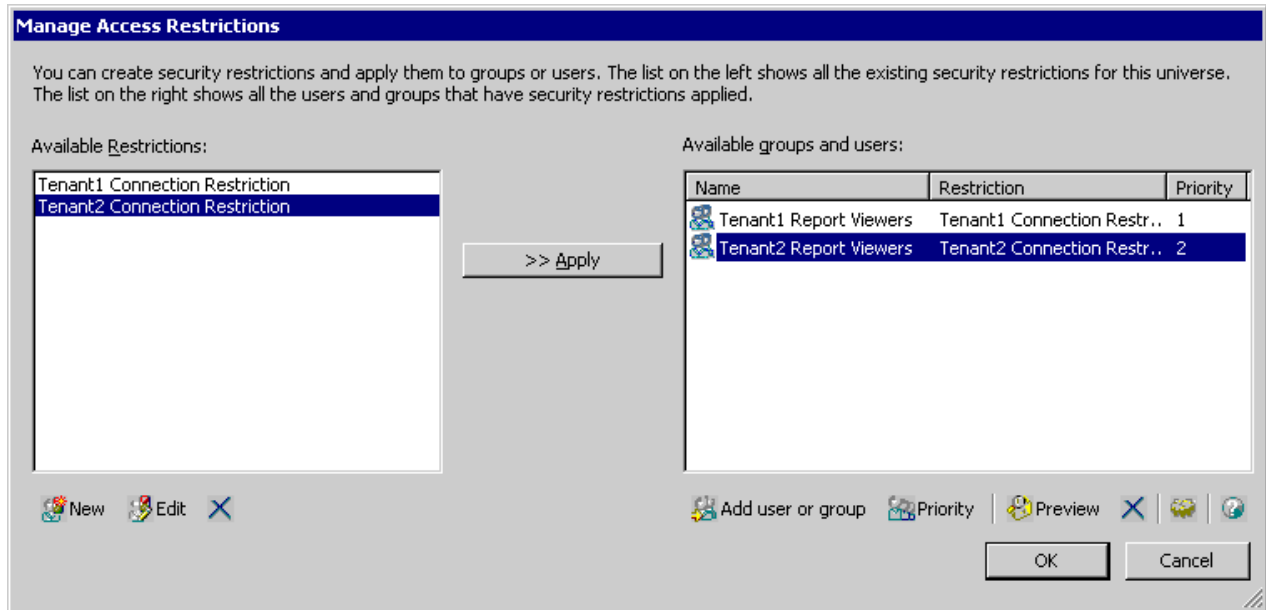


Figure 20: The Manage Access Restrictions Dialog Box Showing Two Restrictions

To create a connection restriction and apply it to the tenant users and groups that you created earlier in [Step 2 \(page 75\)](#):

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

[Figure 21](#) 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.

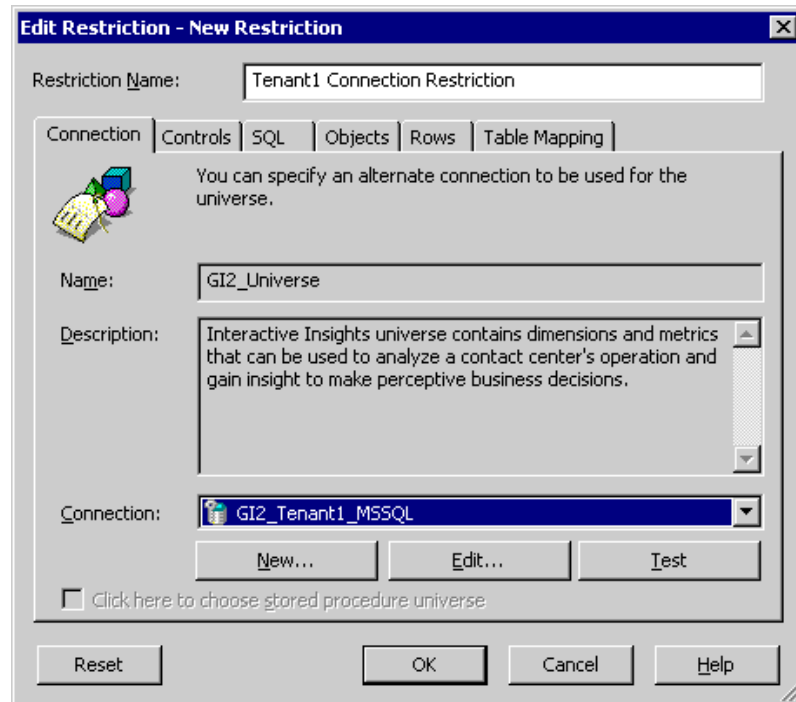


Figure 21: Creating a Connection Restriction for Tenant1

6. Repeat [Steps 2](#) through [5](#) 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.

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 Interactive Insights measures:

- In the Queue/Virtual Queue class:
 - % Calls Abandoned
 - % Calls Answered
 - % Calls Answered Agent
 - % Calls Distributed
 - % Service Level
 - Avg Handle Time
 - Calls Abandoned
 - Calls Offered
 - Handle Time
- In the Activity class:
 - Avg Handle Time
 - Handle Time
- In the State class
 - % Occupancy

You can redefine these measures within Designer as prescribed in the *Genesys Interactive Insights 7.6 Universe Guide*. Please review the *Genesys Interactive Insights 7.6 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 60](#).



Chapter

6

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 79](#)
- [Summary of Universe Changes, page 80](#)
- [Organizing BOE Folders, page 80](#)
- [Migrating Your Custom Reports, page 83](#)

Interoperability of Software Components

Interactive Insights comprises many components; all of them should be in sync, for optimal report operation. [Table 5](#) shows the mix of the minimum required version of each software component for complete functionality of all of the reports that were offered in the previous Interactive Insights 7.6 releases:

Table 5: Software Versions of Interactive Insights Components

Interactive Insights Release	Business Objects Release	Genesys Info Mart Release (Schema)
7.6.0	3.0 (12.0)	7.6.001.07 (7.6.000.09)
7.6.001	3.0 + Hot Fix (12.0)	7.6.001.07
7.6.1	3.1 (12.1)	7.6.003.05
7.6.2	3.1 (12.1) Fix Pack 1.8	7.6.005.11 (7.6.005.00)

Summary of Universe Changes

A few definitions of universe measures changed between releases. Such is the case for the `Business Attribute\%Service Level` and `Interval\Calls Answered` measures, for example. Some measures have been discontinued, such as all of the ... by VQ and ... by Agent Group measures—for example, `ACW Time by VQ` and `Hold by Agent Group`. Some classes have been renamed; `Service Type` in 7.6.0 became `Business Attribute` in 7.6.1; in 7.6.2 `Universe service class` was renamed to `Service Objects`. Also, new measures have been introduced with each release. Refer to the *Genesys Interactive Insights 7.6 Universe Guide* for a complete listing and new definitions of such 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` 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.

Re-Organizing 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** 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; 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 22](#) shows one suggestion for the reorganization of report folders.

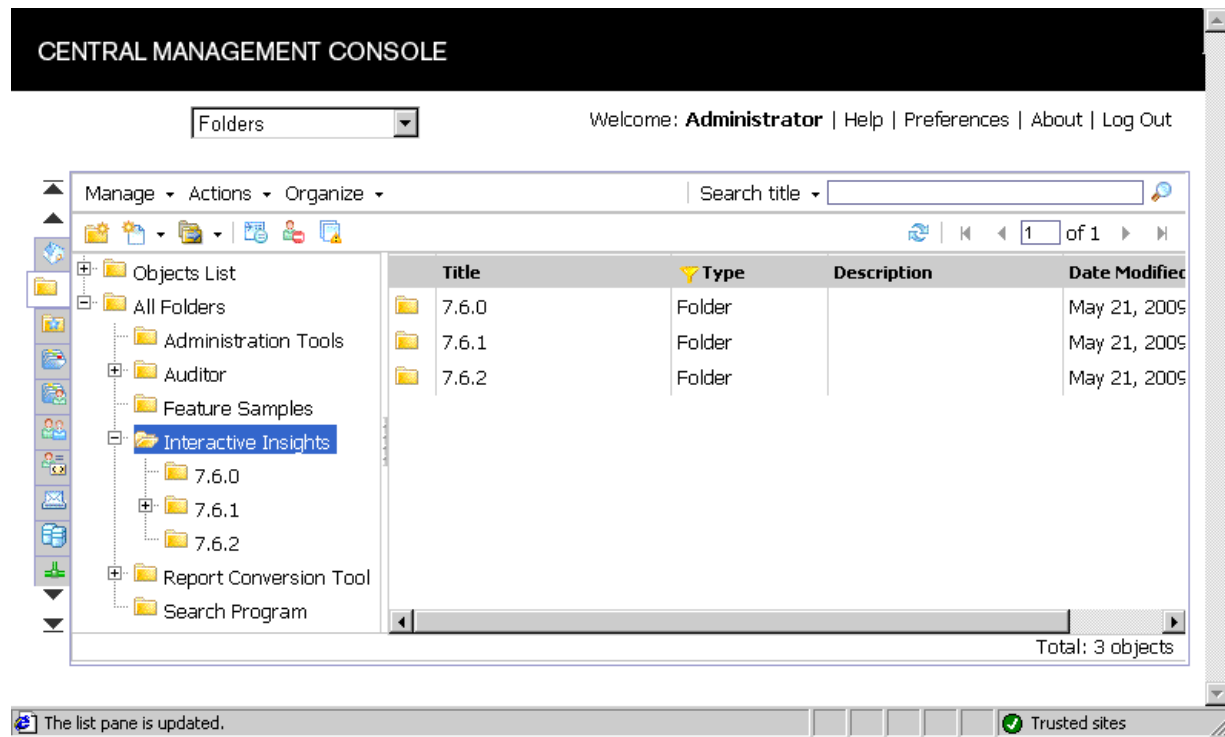


Figure 22: Reorganizing Report Folders into Release-Specific Subfolders

Re-Organizing 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; 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 23 shows one suggestion for the reorganization of universe folders.

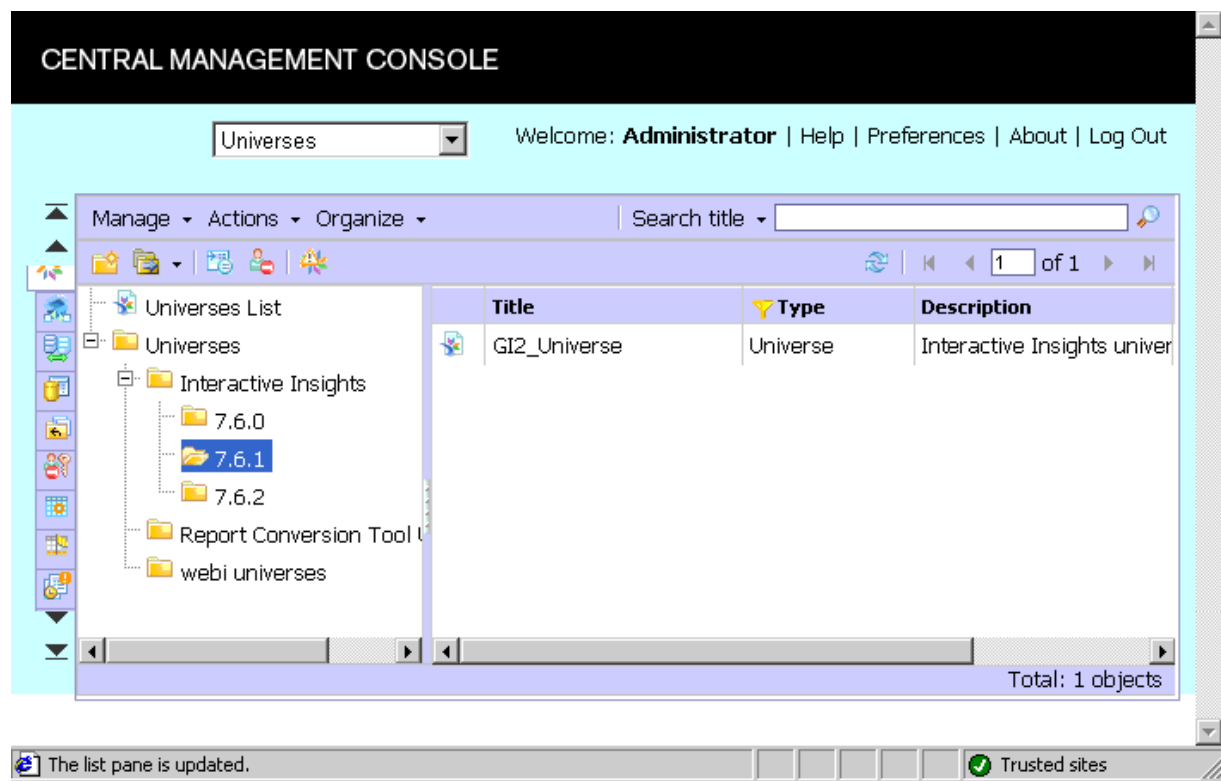


Figure 23: Reorganizing Universe Folders into Release-Specific Subfolders

Migrating Your Custom Reports

The procedure for migrating custom reports that were designed by using a prior release of Interactive Insights requires that you manually link the associated universe for each report to point to the new universe. This is accomplished within Web Intelligence.

1. Open your custom report in Edit mode.
2. Click **Edit Query**, and then select the **Properties** tab, as shown in [Figure 24](#):

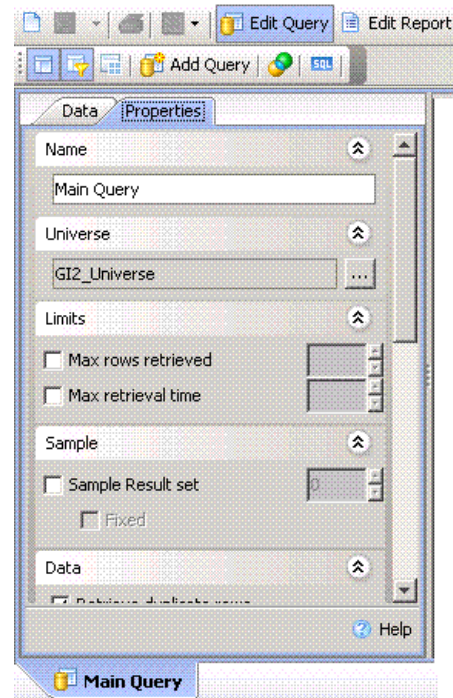


Figure 24: Properties Tab of a Report's Main Query

3. To the right of the universe name, click the three dots to open the Universe dialog box, which is shown in [Figure 25](#):

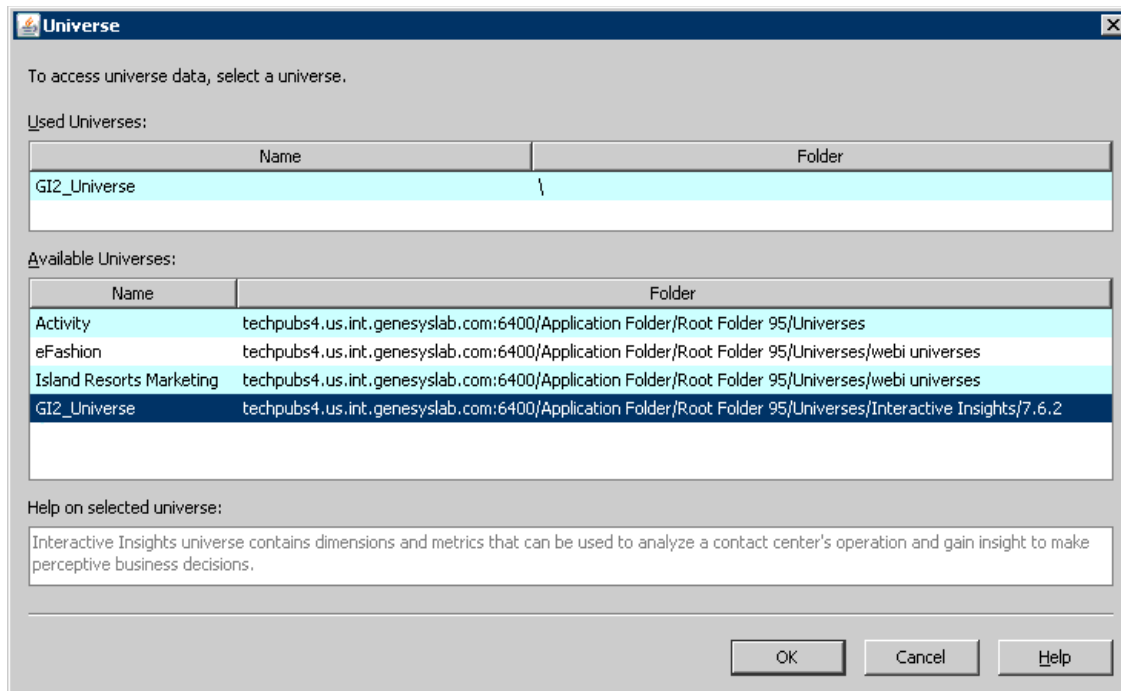


Figure 25: Universe Dialog Box

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 identically names the Interactive Insights universe: `GI2_Universe`. You can distinguish one release's universe from another by the folder in which it is stored.

5. At the Change Source dialog box, shown in [Figure 26](#), 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.



Figure 26: 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 G12_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 Info Mart, and any reports that access data via universe elements. [Figure 27](#) 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.

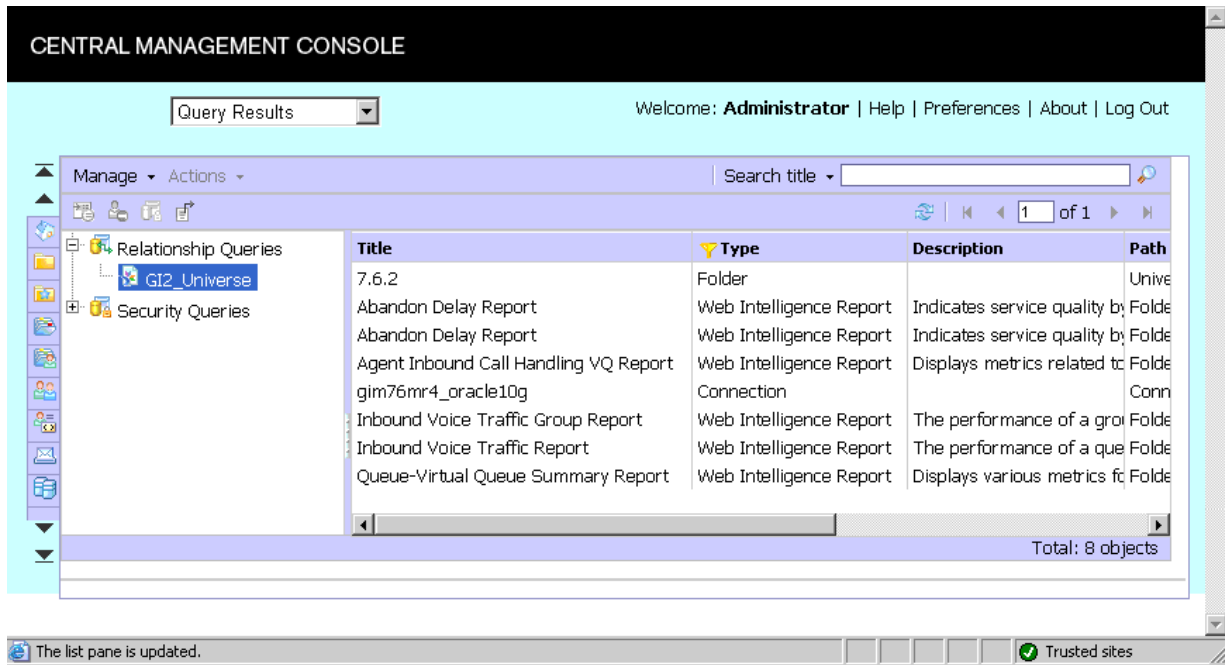


Figure 27: Object Relationships to the Universe



Chapter

7

Accessing Interactive Insights Components

The Genesys 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 87](#)
- [Accessing the Central Management Console, page 88](#)
- [Accessing InfoView, page 88](#)
- [Accessing Web Intelligence, page 89](#)
- [Accessing Designer, page 89](#)

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 28](#), 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

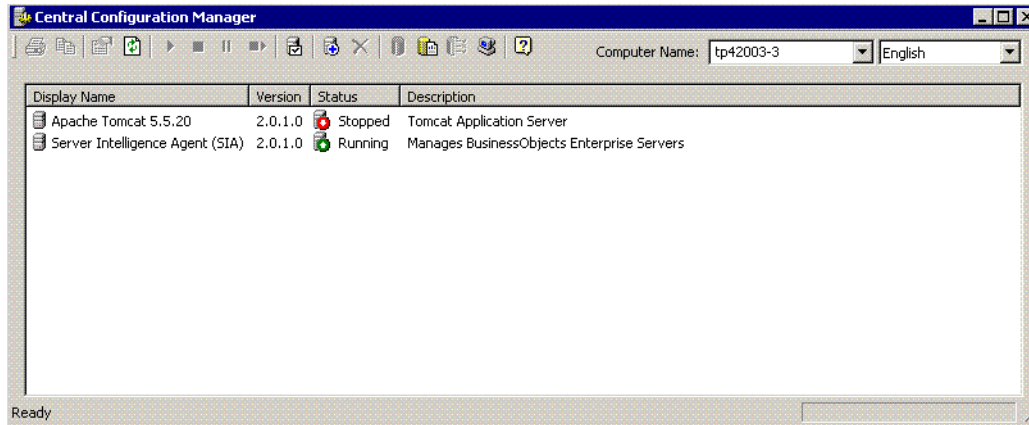


Figure 28: Checking Web Server Status via Central Configuration Manager

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, to customize measures, and to create and assign Info Mart connections for report users. To open Designer on Windows platforms, from the Start menu, select Designer 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

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

8

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. Indeed you *must* uninstall the previous version of Interactive Insights in order to reinstall it or to install a new version. The installation routine prompts you to uninstall Interactive Insights if it detects an existing program instance on your host. You can, however, maintain more than one version of the Interactive Insights universe and the reports in the BOE repository.

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 91](#)
- [Additional Manual Steps to Finish the Uninstall, page 92](#)
- [Uninstalling the Supporting Applications and Data, page 93](#)

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 `setup.exe`.
2. From the Welcome page, click Remove.

From the Control Panel

1. Select and open Add/Remove Programs.
2. Select the Genesys Interactive Insights 7.6 application.
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 `biar.properties` and the installation's log file (`deploy_unv_rep.log`).
2. Delete the Interactive Insights directory itself. The default location of this directory is: `C:\Program Files\GCTI\Genesys Interactive Insights`.
3. Open the Central Management Console, and delete the following objects from the Business Objects repository:
 - The `G12_Universe` 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—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 `G12_GIM_DB` connection.
 - The Interactive Insights user groups, if you manually created these. 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 manually created these:
 - Developer
 - Editor
 - Viewer

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 (GI2_universe.unv)
 - The GI2_universe folder

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:

- 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)*.
- Refer to the Genesys Info Mart documentation set to uninstall Genesys Info Mart.



Chapter

9

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
- The directory that you specified ([Step 7](#) on [page 42](#)) upon installation on UNIX platforms.

Tables [6](#) through [8](#) describe the files that make up this folder/directory.

Table 6: Contents of the Root Folder

File Name	Description
biarImport.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.
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: <ul style="list-style-type: none">• The Interactive Insights installation routine deploys this file even if you elect 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 CMS, after installation, consider editing it to remove the password if you are concerned about security.

Table 6: Contents of the Root Folder (Continued)

File Name	Description
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 deploy_unv_rep script is run.
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: <ul style="list-style-type: none"> • gi2_setenv • gi2_customize_bo • gi2_deploy_unv_rep • gi2_deploy_sec • gi2_deploy_sum
gi2_deploy_sec.bat (Windows) gi2_deploy_sec.sh (UNIX)	Script that imports the Interactive users, user groups, and the permissions associated with BOE objects. 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_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 (does not import object permissions associated with these objects). This script prepares the environment for the biarImport.jar application and relies on BOE parameters that are specified in the gi2_setenv script.
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_utils.jar	Java application that replaces JSP files that are located in the Tomcat directory with Genesys-modified pages, under qualifying circumstances.

Table 6: Contents of the Root Folder (Continued)




File Name	Description
insights.biar	BIAR that contains an export of the Genesys Interactive Insights universe, reports, PDF documents, folders, users, groups, and their permissions.
 conf	Subfolder that contains the log4j and biar properties files.
 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 three subfolders are named as follows: <ul style="list-style-type: none"> • db2 • oracle • mssql See Table 8 for the contents of each subfolder.

Table 7: Contents of the conf Subfolder

File Name	Description
biar.properties	Generated by the gi2_deploy_unv_rep scripts, file that contains the internal properties that are used during the installation process. Note: This file contains the unencrypted password to CMS.
log4j.properties	Configuration file of logging parameters for the biarimport.jar file.

Table 8: Contents of the sql_scripts/[dbtype] Subfolder

File Name	Description
make_gi2.sql	SQL script that contains database objects for Interactive Insights operation. The installation routine does not execute this script; you must execute it manually against your Genesys Info Mart 7.6 database. See “Deploying Utility Views Specific to Interactive Insights” on page 55 for additional information.



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