Genesys Interactive Insights 8.1

Deployment Guide

About Genesys

Genesys is the world's leading provider of customer service and contact center software—with more than 4,000 customers in 80 countries. Drawing on its more than 20 years of customer service innovation and experience, Genesys is uniquely positioned to help companies bring their people, insights and customer channels together to effectively drive today's customer conversation. Genesys software directs more than 100 million interactions every day, maximizing the value of customer engagement and differentiating the experience by driving personalization and multi-channel customer service—and extending customer service across the enterprise to optimize processes and the performance of customer-facing employees. Go to www.genesys.com for more information.

Each product has its own documentation for online viewing at the Genesys Customer Care website or on the Documentation Library DVD, which is available from Genesys upon request. For more information, contact your sales representative.

Notice

Although reasonable effort is made to ensure that the information in this document is complete and accurate at the time of release, Genesys Telecommunications Laboratories, Inc., cannot assume responsibility for any existing errors. Changes and/or corrections to the information contained in this document may be incorporated in future versions.

Your Responsibility for Your System's Security

You are responsible for the security of your system. Product administration to prevent unauthorized use is your responsibility. Your system administrator should read all documents provided with this product to fully understand the features available that reduce your risk of incurring charges for unlicensed use of Genesys products.

Trademarks

Genesys and the Genesys logo are registered trademarks of Genesys Telecommunications Laboratories, Inc. All other company names and logos may be trademarks or registered trademarks of their respective holders.

The Crystal monospace font is used by permission of Software Renovation Corporation, www.SoftwareRenovation.com.

Technical Support from VARs

If you have purchased support from a value-added reseller (VAR), please contact the VAR for technical support.

Customer Care from Genesys

If you have purchased support directly from Genesys, please contact Genesys Customer Care. Before contacting Customer Care, please refer to the ***Genesys Care Support Guide for On-Premises*** for complete contact information and procedures.

Ordering and Licensing Information

Complete information on ordering and licensing Genesys products can be found in the ***Genesys Licensing Guide.***

Released by

Genesys Telecommunications Laboratories, Inc. www.genesys.com

Document Version: 81ii_dep_02-2015_v8.1.403.00

Table of Contents

Preface

Welcome to the *Genesys Interactive Insights 8.1 Deployment Guide*. This document introduces you to the configuration, installation, setup, and start procedures that are relevant to the setup of Genesys Interactive Insights (GI2) universes and the operation of GI2 reports.

This document is valid only for the 8.1.*x* releases of the GI2 product.

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

This preface contains the following sections:

For information about related resources and about the conventions that are used in this document, see the supplementary material starting on page 111.

About GI2

GI2 provides reports that summarize contact center activity and an entire universe, named `GI2_Universe`, of elements that support them.

Intended Audience

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

- Computer-telephony integration (CTI) concepts, processes, terminology, and applications.
- Network design and operation.
- Your own network configurations.
- Contact-center functions and operations.
- The Genesys telephony and interaction models.
- The structure of and connectivity parameters for the Genesys Info Mart database.

You should be familiar also with the installation, configuration, and use of SAP BusinessObjects Business Intelligence Platform (BI) 4.1 software, which is the third-party tool from which the GI2 reports and universe were built.

Chapter Summaries

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

- Chapter 1, "Genesys Interactive Insights Overview", beginning on page 13, sketches the interrelationships between the Genesys and BusinessObjects Enterprise (BO) components on which GI2 relies.
- Chapter 2, "Which BO Components Must Be Installed?", beginning on page 19, describes the minimum subset of BO components that are needed for GI2 operation.
- Chapter 4, "Installing Genesys Interactive Insights", beginning on page 63, lists the prerequisites for installation and describes the steps to deploy GI2 on UNIX and Microsoft Windows platforms.
- Chapter 3, "Setting Up the Environment", beginning on page 29, points out the additional setup steps that are required to ready your environment including linking the universe to Data Mart, setting data access restrictions, using GI2 in different languages, and customizing measure definitions.
- Chapter 5, "Accessing Genesys Interactive Insights Components", beginning on page 83, describes how to invoke certain BO applications in order to access the GI2 reports and universe. This chapter also provides specific references to BO documentation that describes how to use the applications.
- Chapter 6, "Migrating Genesys Interactive Insights", beginning on page 89, discusses how to organize your environment to maintain multiple universes of GI2 and how to link your custom reports to the most recent universe.

- Chapter 7, "Uninstalling Genesys Interactive Insights", beginning on page 103, describes both the wizard-driven and manual steps that are required to uninstall GI2.

Making Comments on This Document

If you especially like or dislike anything about this document, feel free to e-mail your comments to Techpubs.webadmin@genesys.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 scope of this document only and to the way in which the information is presented. Contact your Genesys Account Representative or Genesys Customer Care if you have suggestions about the product itself.

When you send us comments, you grant Genesys a nonexclusive right to use or distribute your comments in any way it believes appropriate, without incurring any obligation to you.

Contacting Genesys Customer Care

If you have purchased support directly from Genesys, please contact Genesys Customer Care. Before contacting Customer Care, please refer to the *Genesys Care Support Guide for On-Premises* for complete contact information and procedures.

Document Change History

This section describes the changes that have been incorporated within this guide since the 8.1.0 release of GI2:

Changes Introduced in Release 8.1.400

- SQL Server 2012 and Oracle 12 are supported (page 15). Support for Oracle 10g and 10g RAC is discontinued, effective February, 2014.
- New Data Access Restriction capabilities are added, including the ability to restrict access to objects within BO so that users see a limited set of data and reports. See page 56.
- Queue attached data is now supported: Queue hierarchies now provide key columns that you can configure to join to two custom user data Info Mart dimension tables of your choice.

- Updated the procedure “Translating the Universe, GI2 Reports, and BO GUI” on page 59.

Changes Introduced in Release 8.1.300

- A new prerequisite is identified on page 21 regarding BO installation in environments that use Security Enhanced RedHat Enterprise Linux.
- The limitations for host-name specification are updated to match that documented by SAP BusinessObjects. See pages 66 (CMS host) and 69 (CMS host and SIA node name).
- The steps required to apply, or re-apply, BO customization are updated. See page 31.
- A note was added on page 33 to warn against using the Genesys-provided `GI2_GIM_DB` connection. This connection is reserved for Genesys use only.
- A note is added on page 35 that provides driver type recommendations for configuring a Universe connection with Microsoft SQL Server.
- The listing of RAA releases that correspond to GI2 releases has been added to Table 3 in the “Interoperability of Software Components” section. See page 90.
- Information added describing the migration of the custom universe and reports in Release 8.1.3. See page 93.
- Among the files that the GI2 installation routine deploys are new scripts and directories that support a BI 4.1 deployment. Refer to “Application Files” beginning on page 107 for the complete listing and descriptions of the deployed files.
- Additional changes were made throughout this document to introduce BI 4.1 as the supporting suite for GI2 8.1.3 operation.
- Added procedures describing the steps required to create a Connection to your data source in BI 4.1 deployments. See “Defining a New Connection (BI 4.1)” on page 37 or “Using the Default Connection (BI 4.1)” on page 39, and “Connecting to the GI2 Universe (BI 4.1)” on page 41.

Changes Introduced in Release 8.1.104

- New Data Access Restriction capabilities are added, including the ability to restrict access to objects within BO so that users see a limited set of data and reports. See page 56.
- Queue attached data is now supported: Queue hierarchies now provide key columns that you can configure to join to two custom user data Info Mart dimension tables of your choice.
- SQL Server 2012 and Oracle 12 are supported (page 15). Support for Oracle 10g and 10g RAC is discontinued, effective February, 2014.

Changes Introduced in Release 8.1.101

- "Setting Up Attached Data" on page 32 is a new addition to this document.
- The last step that was previously listed in the "Creating Connection Restrictions" section was moved to Step 10 (page 36) of the "Defining a New Connection" section.
- The previous instruction to "Export the results back to CMS" on page 60 was updated to "*Save and* export the results back to CMS".
- A sixth step was added to the procedure for setting up your system to use the GI2 universe and display GI2 reports in a different language when you change your host's default locale. See page 61.
- A new section, "Accessing Translation Manager" on page 87 was added.
- The `script` folder was removed from Table 4 beginning on page 107. The GI2 installation routine was corrected to deploy this folder as a subfolder of the `agg` folder.

Changes Introduced in Release 8.1.100

- Instructions were added for using GI2 in different languages. See page 59.

Changes Introduced in Release 8.1.000

- Several third-party drivers and some customization scripts were added to the Reporting and Analytics Aggregates installation package, which is included within the GI2 installation package. Refer to the *Reporting and Analytics Aggregates 8.1 Deployment Guide* for a listing of these drivers and descriptions of these scripts.

Other Changes

For information about changes to reports and the universe elements that were introduced throughout the 8.1 releases, refer to the *Genesys Interactive Insights 8.1 Universe Guide.* Also, refer to the *Genesys Interactive Insights 8.1 User's Guide* for a discussion of new examples on how to customize the universe and reports to meet business needs.

Chapter

1 Genesys Interactive Insights Overview

Genesys Interactive Insights 8.1.*x* (GI2) uses the data that is stored in a Genesys Info Mart 8.1.*x* 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 GI2 8.1 operation and includes the following sections:

Presentation Layer for Genesys Info Mart

GI2 is the presentation layer that Genesys has designed for the business-like interpretation of source data that is collected and stored in Info Mart. GI2 provides a universe of over 600 defined agent-, agent-session-, campaign-, and queue-type measures and over 40 reports that summarize contact center activity. This functionality is delivered with the power of SAP BusinessObjects Enterprise (BO) XI 3.1 in Release 8.1.0 / 8.1.1, and SAP BusinessObjects Business Intelligence Platform (BI) 4.1 in Release 8.1.3 and later. Figure 1 illustrates how the components that contribute to GI2 operation fit together.

Refer to the *Genesys Interactive Insights 8.1 Universe Guide* for in-depth details about the Genesys-provided reports and measures.

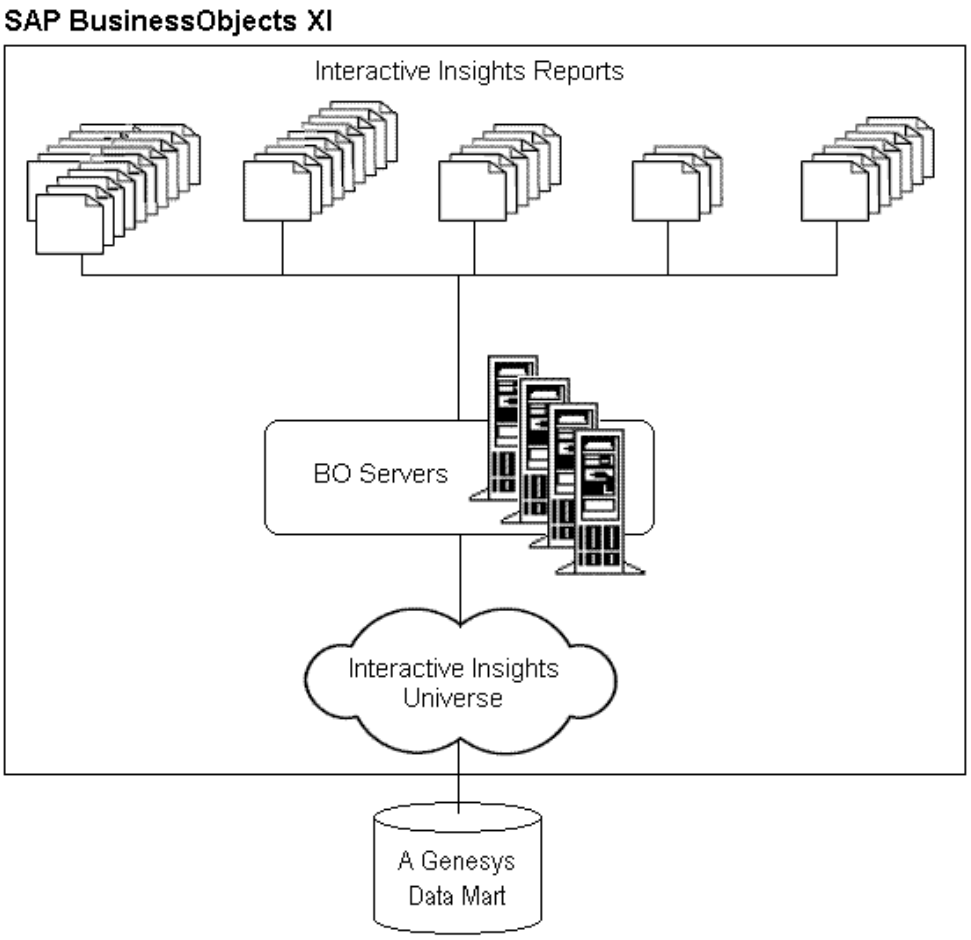


Figure 1: BO Architecture Using GI2

Genesys Info Mart 8.1

GI2 pulls data directly from the Info Mart. So, for pure operation, GI2 requires that no other Genesys product be running in order for the GI2 reports to be scheduled, maintained, opened, and run. Only the Info Mart's RDBMS and BusinessObjects (BO) software must be in operation. From a practical standpoint, however, Info Mart should be populated regularly with meaningful data that is sourced from contact center activities that are directed, monitored, and recorded by a number of Genesys products.

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

The RAA engine—an optional Genesys Info Mart component that is mandatory for GI2 operation—compiles data from these `FACT` tables and stores it within several aggregate tables, based on the appropriate aggregation level (subhour [i.e., 30-minute], hour, day, and month) and type of data (disposition or interval). Refer to the *Genesys Interactive insights User's Guide* for information about these measure types. Other aggregation levels are available as views. Use of these aggregates drastically improves query performance when you run the GI2 reports.

The Info Mart schema was updated significantly in the Genesys Info Mart 8.*x* releases to enable measurement of threaded interactions, among other features. The GI2 8.*x* universe and reports reflect the changes and function properly when they are paired with an Info Mart that is based on the appropriate Genesys Info Mart 8.*x* schema. Table 3 on page 90 provides this mapping of GI2 release to Genesys Info Mart schema. Refer to the chapter of the *Genesys Interactive Insights 8.1 Universe Guide* for a list of the underlying Genesys Info Mart source tables of each GI2 report, as well as either:

- The *Genesys Info Mart 8.1 Reference Manual* for your particular RDBMS type, for in-depth descriptions of the fact and dimension Info Mart tables and their columns.
- The *Reporting and Analytics Aggregates 8.1 Reference Manual*, for in-depth descriptions of aggregation tables and their columns.

The 8.1 release of GI2 supports the generation of reports from Genesys Info Mart data sources that are managed by the following RDBMSs:

- PostgreSQL 9.3
- Oracle 11g and 12c.
- Oracle 11g RAC.
- Microsoft SQL Server 2005, 2008, and 2012.

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

SAP BusinessObjects

BO XI 3.1 is the business intelligence software that powers GI2 8.1.0 and 8.1.1 For GI2 8.1.3 and 8.1.4, BI 4.1 is the driving software. The tools that are furnished within these software suites enable you easily and quickly to produce meaningful results, and provide analysis for more effective decision making.

A full BO installation contains all of the components shown in Figure 2. Many of these components, however, are not used for GI2 operation. Figure 3 shows the minimum components that are required to use the GI2 universe and generate GI2 reports.

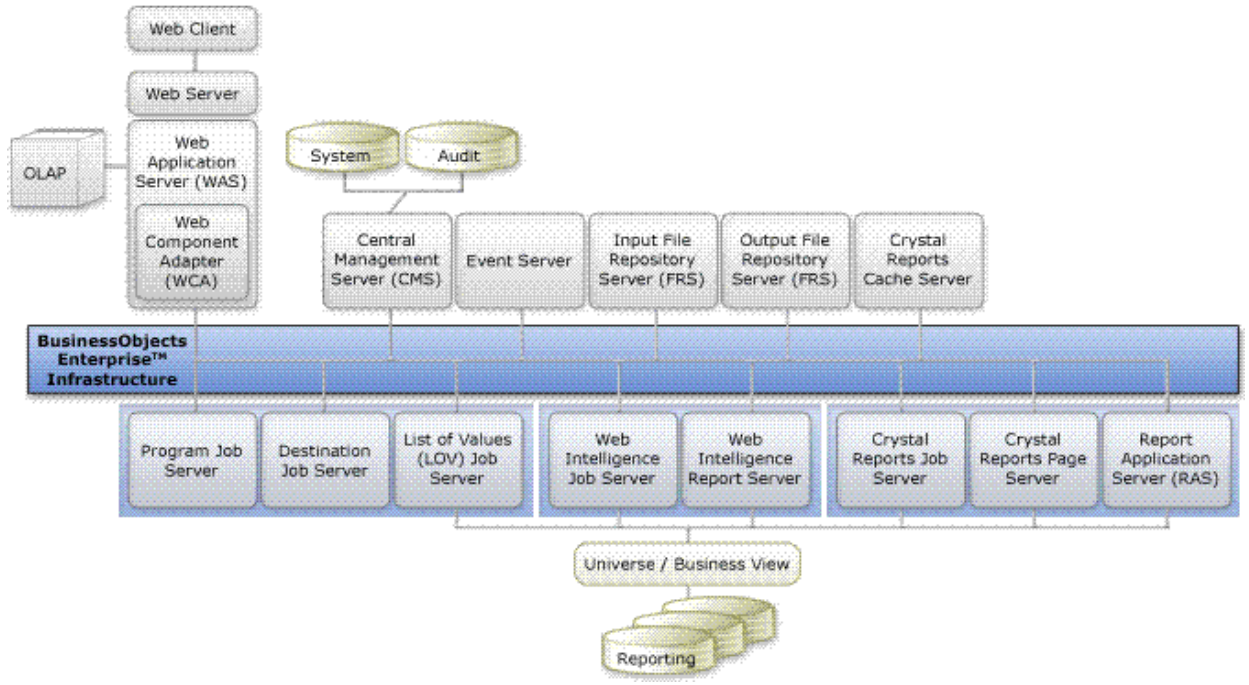


Figure 2: BO XI 3.1 Architecture

Refer to BO documentation for a complete description of these components.

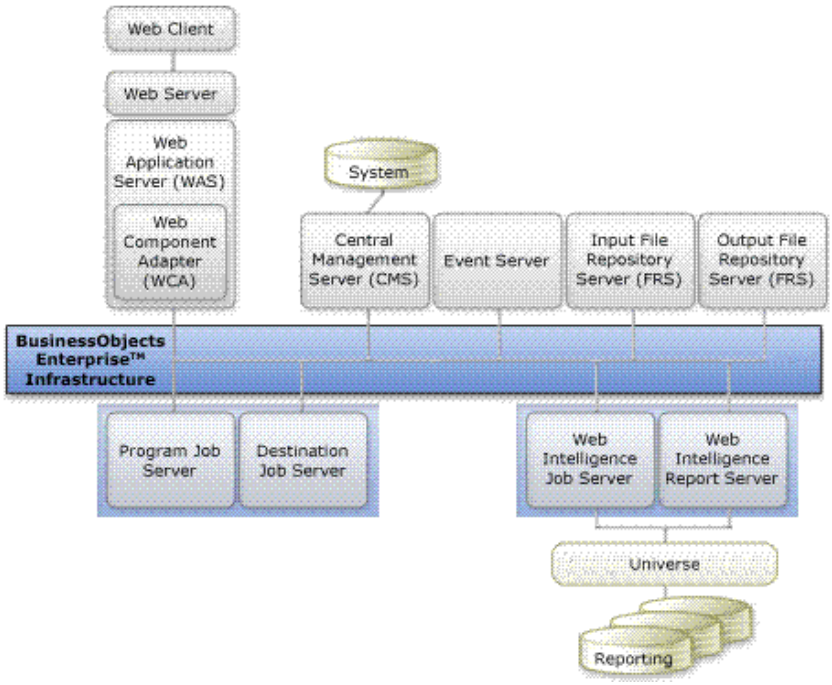


Figure 3: Minimum BO Components for GI2 Operation

Refer to "Server changes since XI x.x" in the *Business Intelligence Platform Administrator Guide* for the differences between different releases of XI.

Deploying GI2

To use GI2, you must perform, at minimum, two independent installations. A third independent installation is required if you choose to install BO apart from the installation of GI2:

- Genesys Info Mart 8.1—You must have the Genesys Info Mart 8.1 CD (or image) to install Info Mart 8.1. Please refer to:
  - The *Genesys Info Mart 8.1 Deployment Guide* and *Genesys Info Mart Deployment Procedure* for instructions on installing this product.
  - "Readying Genesys Info Mart for Aggregation" on page 29 of this document, for additional setup information.
  - The GI2 release advisory for the minimum required version of Genesys Info Mart 8.1 software.
- SAP BusinessObjects Business Intelligence Platform—Refer to BO documentation for instructions on manually installing this software. Both silent and manual installations require the SAP BusinessObjects Business Intelligence Platform CD (or image).
- GI2 8.1—You must have the Genesys Interactive Insights 8.1 CD (or image) to install the GI2 universe and reports.

  Refer to Chapter 4, "Installing Genesys Interactive Insights," on page 63 of this document, for deployment instructions and Chapter 3, "Setting Up the Environment," on page 29 for post-GI2 setup.

  The GI2 IP also includes Reporting and Analytics Aggregates (RAA) 8.1. A GI2 installation automatically and silently deploys RAA. You should not install RAA independently prior GI2 installation. Refer to the Reporting and Analytics Aggregates documentation set for information about this Genesys Info Mart option.

Unlike most other Genesys products, the GI2 application is *not* configured within Configuration Server.

Chapter

2 Which BO Components Must Be Installed?

Note: This chapter mostly applies to SAP BusinessObjects Enterprise (BO) XI 3.1. Regarding SAP BusinessObjects Business Intelligence Platform (BI) 4.1, Genesys does not provide its own installer consisting of mandatory-only components. Refer to SAP BusinessObjects Business Intelligence Platform 4 documentation for installation and upgrade instructions.

The *SAP BusinessObjects XI Installation Guide for Windows/UNIX* 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. BusinessObjects (BO) documentation is available on the Genesys-provided BO documentation DVD and at `http://help.sap.com` on the `Business Objects` tab (for direct BO customers). Please consult either resource for installing the software. SAP BusinessObjects Business Intelligence Platform 4 documentation is available from the following URL:

```
http://help.sap.com/bobip41
```

Only a subset of BO XI components, however, is needed to achieve full Genesys Interactive Insights (GI2) operation. The required components are predefined for you when you select to install BO, silently, as part of the GI2 installation. Some other components of the BO XI suite, which are not required for GI2 installation, are not deployed when BO is installed together with GI2. For the instructions on installing BO in this manner, refer to Chapter 4, "Installing Genesys Interactive Insights".

*. Throughout this document, references to *the BO XI suite* or *BO components* apply to either the SAP BusinessObjects XI 3.1 suite or the SAP BusinessObjects Business Intelligence Platform 4.1 suite.

If you choose to install BO independent of a GI2 installation, you might be interested in knowing which BO components have no impact on GI2 operation. This information is indirectly provided in this chapter, which describes the BO XI 3.1 components that *must* be installed. This chapter includes the following sections:

Note: BO XI 3.1 must be installed prior to, or in concert with, GI2 8.1.0 or 8.1.1.

Prerequisites

To successfully install BO XI 3.1 or BusinessObjects Business Intelligence Platform (BI) 4.1, the following prerequisites must be met:

- You must have the appropriate installation package, which is provided either directly from SAP or from Genesys. Furthermore, prior BO versions cannot pre-exist on your host. If you have a prior version, you should upgrade it, rather than install it anew. Refer to the *BusinessObjects Enterprise Upgrade Guide* for instructions.
- Your operating system version must comply with a supported version.

  Supported platforms are provided in BO documentation.

  Note: BO supports a wider range of platforms than does Genesys.

- Your environment meets or surpasses the minimum hardware and sizing requirements described in BO documentation for the various BO servers. For example:
  - BO XI 3.1 requires 2 GB RAM and up to 7 GB hard-disk space.
  - BI 4.1 requires 16 GB RAM and up to 14 GB hard-disk space.
- Your environment meets or surpasses the minimum software requirements for the various server products described in BO documentation.

  Note: SAP BO supports connectivity to a wider range of RDBMSs than does Genesys. This release of GI2 restricts RDBMS support to those that currently are supported by Genesys Info Mart 8.1. This information is available in the *Genesys Supported Operating Environment Reference Guide.*

UNIX Notes

In addition, for UNIX platforms:

- To install BO, you cannot be logged on as the `root` user.
- The `LOCALE` setting of the UNIX shell must be set to Unicode encoding:
  - `en_US.UTF-8` (for Solaris)
  - `en_US.utf8` (for Linux)
    - Disable the Security Enhanced Linux feature for a RedHat Enterprises Linux operating system.

    The standard RHE installation enforces this feature by setting `SELINUX=enforcing` in the `. /etc/sysconfig/selinux` file. You must set this parameter to `disabled` and reboot the server in order for a BO installation to be successful.
- On Linux 5.x installations, make sure that the first line of the `etc/hosts` file contains the default string: `127.0.0.1 localhost.localdomain localhost`.

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 BO installation. Later, when you install GI2, you will need the BO administrator's user name and password, as well as the host and port information, if the default values were not chosen. The defaults are:

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

Genesys recommends that you specify a nonblank password. You can retrieve the port number from the Central Configuration Manager, as follows:

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

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

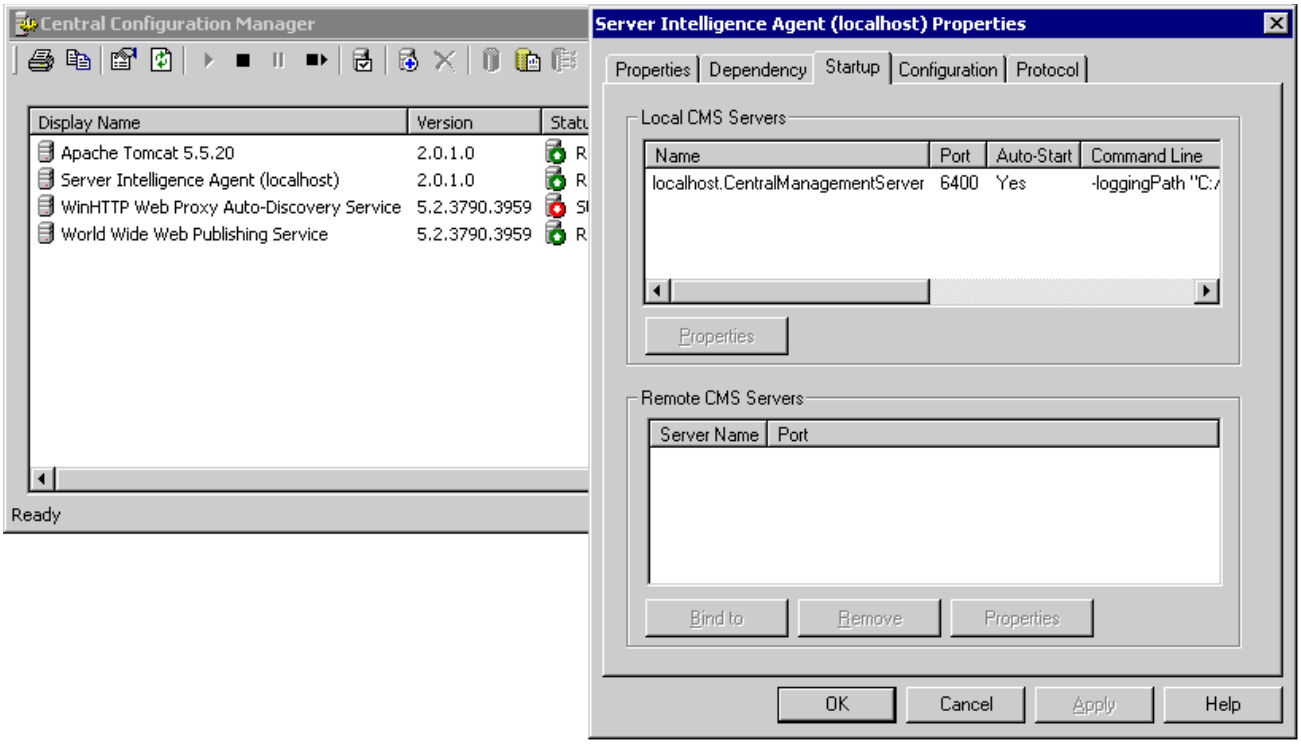


Figure 4: Obtaining the CMS Port

Note: The BO 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 BusinessObjects Components

This section lists the BO components that you must install for GI2 operation.

Note: Beginning with BO XI 3.1 Service Pack 5, the Genesys installer installs all BO components

A Full SAP BO XI 3.1 Deployment

A full deployment of SAP BO 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 Microsoft Windows platforms.

Server Components

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

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

Web Tier Components

- BI Platform Web Components
- BOE Web Services
- Tomcat

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

Database Access

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

Export Support

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

The Required Set of BO XI 3.1 Components

Not all of the aforementioned client and server components interoperate with GI2. If you are manually installing BO, when prompted at the `Select Features` page of the BO XI 3.1 Setup Wizard, (shown in Figure 5), select, at minimum, the following components to install:

Client Components

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

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

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

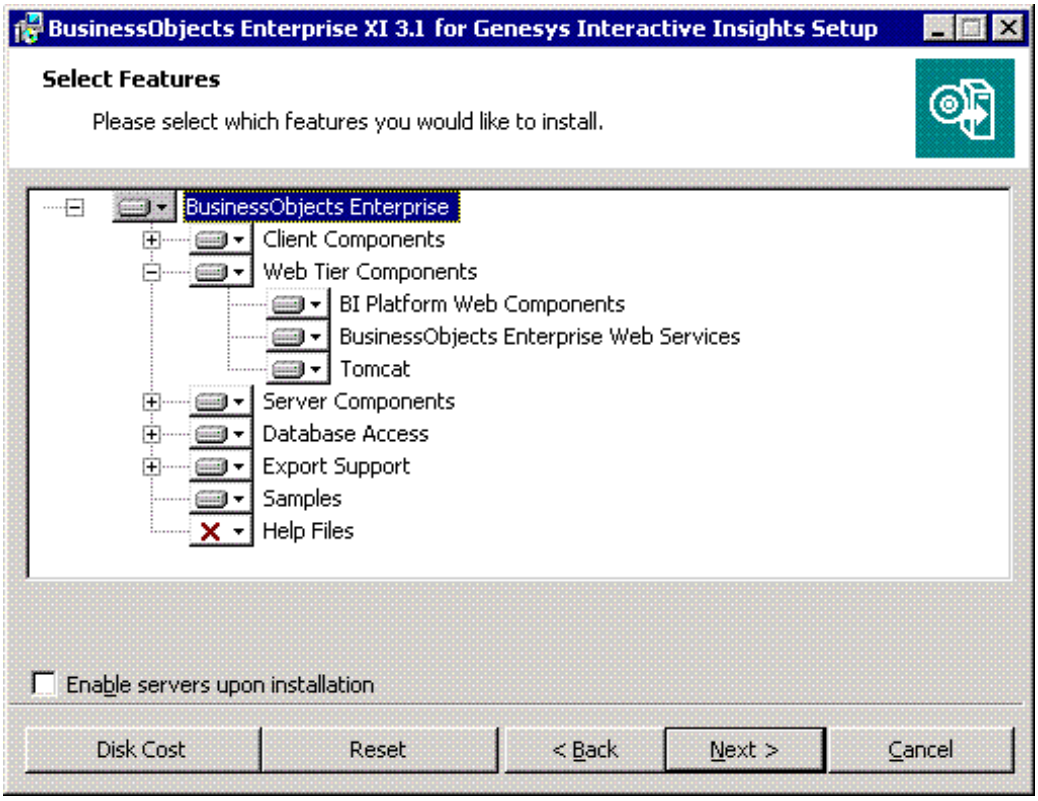


Figure 5: Select BO Features

Server Components

- Central Configuration Manager (Microsoft 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, GI2 supports connectivity to the following RDBMSs, as supported in the Genesys Info Mart 8.1.*x* releases:

- Microsoft SQL Server
- Oracle

Refer to the *Genesys Supported Operating Environment Reference Guide* for the specific supported versions.

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

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

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

Installing BO Prior to Installing GI2

A complete version of BO software is provided among the software that is bundled with GI2. Instructions for installing the complete version of this software are provided in BusinessObjects documentation—specifically, within the following documents:

SAP BusinessObjects Enterprise XI 3.1 4

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

SAP BusinessObjects Business Intelligence Platform 4

- *Installation Guide for Windows*
- *Installation Guide for UNIX*

Indeed, you must install the complete version if you want more functionality than that which is provided by the standard Genesys configuration of BO for GI2. This standard configuration specifies the following:

- English language
- Tomcat application server
- Sybase SQL Anywhere 12.0.1 (installed by default as the DBMS for the Central Management Server (CMS), for all platforms)
- `Administrator`, as the name of the CMS administrative user

In addition, in order to use other tools of the BO XI suite that GI2 neither uses nor installs (such as Crystal Reports), you must install BO independently from GI2. Keep in mind, though, that deployment of the full version of BO still binds you to the limited licensing agreement regarding its use, which is described under “Licensing Restrictions” in the *Genesys Interactive Insights 8.1 User’s Guide.*

However, Genesys provides the opportunity to install BO silently using the GI2 installation routine, which is described beginning on page 63. The silent

installation deploys fewer components of the BO XI suite. This option might be more desirable to preserve system resources and hard disk space.

BO Service Packs, Fix Packs and Hot Fixes

To fully appreciate the functionality that GI2 software provides, Genesys requires that you install the latest service and fix packs for BO software *that have been validated by Genesys Quality Assurance*. If you are a direct BO customer—that is, if you purchased BO software directly from SAP—other, more recent service or fix packs might be available to you, in addition to those that come bundled with GI2. Please note that GI2 software might respond differently from what you might expect when used in conjunction with service and fix packs that are not tested by Genesys. Please refer to Table 3 on page 90 to learn about the BO software that is recommended for operation with GI2 8.1.

In addition to BO-provided packs, Genesys might provide hot fixes to BO software that are not available to the general BO public. Any such hot fixes would be described in the *SAP BusinessObjects Business Intelligence Platform Server/Client Hot Fix Release Notes* if such a hot fix exists.

Setting Up the BO Environment

Refer to the *SAP BusinessObjects Enterprise XI 3.1 Administrator's Guide* or the *Business Intelligence Platform Administrator Guide* to set up the administrative functions for using BO 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 GI2 installation are initially available only to the following users:

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

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

Refer to page 44 for information about the GI2 groups and users that are provided in the GI2 BusinessObjects archive.

Note: Preferences and permissions for BO components that are not required for GI2 operations—such as Crystal Reports and Xcelsius—may be disregarded.

Chapter

3 Setting Up the Environment

After you have installed Genesys Interactive Insights (GI2), you must run additional setup steps manually before you operate the GI2 reports. This chapter describes these steps in the following sections:

Readying Genesys Info Mart for Aggregation

A Genesys Info Mart 8.1 installation that has the Reporting and Analytics Aggregates (RAA) option deployed contains the tables and views that are referenced by the GI2 reports. To prepare the Genesys Info Mart environment for GI2 operation, you must perform additional setup steps, including:

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

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

Reposition the \agg Subdirectory

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

Set Aggregation-Related Options

To enable aggregation, you must appropriately set aggregation-related configuration options (such as `aggregation-engine-class-name`, `run-aggregates`, and business-specific thresholds) in the Genesys Info Mart application object in Configuration Manager. These options are described in the *Reporting and Analytics Aggregates 8.1 Deployment Guide.*

Utility Views Specific to GI2

Running aggregation for the first time executes an internal script against your Genesys Info Mart database to set up the necessary views for the GI2 reports.

Among the views created for this purpose are the following:

- `TODAY`
- `RELATIVE_RANGE`
- `GI2_CONSTANTS`
- `INTERACTION_DESCRIPTOR_GI2`
- `INTERACTION_FACT_GI2`
- `INTERACTION_RESOURCE_FACT_GI2`
- `INTERACTION_RESOURCE_STATE_GI2`
- `INTERACTION_TYPE_GI2`
- `IXN_RESOURCE_STATE_FACT_GI2`
- `MEDIATION_SEGMENT_FACT_GI2`
- `RESOURCE_GI2`
- `RESOURCE_STATE_REASON_GI2`
- `SM_RES_SESSION_FACT_GI2`
- `SM_RES_STATE_FACT_GI2`
- `SM_RES_STATE_REASON_FACT_GI2`

Genesys Info Mart Multi-Tenant Environments

For Genesys Info Mart environments that contain more than one tenant, run RAA with the `updateAliases` runtime parameter to create tenant views of GI2 objects. For a description of this parameter and an example of its use, refer to the *Reporting and Analytics Aggregates 8.1 Deployment Guide* and the *Reporting and Analytics Aggregates 8.1 User's Guide,* respectively.

Customizing BO

Use the information in this section to apply, or re-apply, customizations to BO.

After Full Installation

The GI2 installation routine silently runs the script `gi2_customize_bo.bat/sh` to customize the appearance of BO, which also replaces some files in the BI Tomcat `webapps` directory. After installation, complete the following steps to restore the contents of the BI Tomcat `webapps` directory:

1. Stop Tomcat.
2. Delete the directory `'BOE_TOMCAT_ROOT%\work\Catalina\localhost\BOE`
3. Restart Tomcat

After Fix Pack Installation

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

If you install this fix pack after installation of GI2, you must also re-execute the `gi2_customize_bo` script. (This script is described on page 108.)

1. Execute the `gi2_customize_bo` script.
2. Stop Tomcat.
3. Delete the directory `'BOE_TOMCAT_ROOT%\work\Catalina\localhost\BOE`
4. Restart Tomcat

After 8.1.3 or 8.1.4 Installation

Perform the following customization steps only on GI2 8.1.3, and later, deployments.

Customizing Date and Time Display

Optionally, you can configure the date and time values that appear in GI2 reports. By default, the prompts for dates and times do not save custom values

you enter, and reports always show default date and time values. To change this behavior, complete the following steps:

1. Open the Information Design Tool.
2. In the GI2 universe, enable `Keep Last Value` for the following date/time related parameters:
   `Pre-set Day Filter, Pre-set Date Filter, Start Date, End Date, Report Date.`
3. Restart the BO server.

Customizing GI2 User Rights

Use this procedure to manually configure rights that are not provided in the `LCMBIAR`.

1. Start the Central Management Console (CMC)
2. On the `Applications` tab, right click on the `Central Management Console` application element, and in the context menu, select `CMC Tab Access Configuration.`
3. In the `CMC Tab Access Configuration: CMC` dialog box, select `Restricted`, and click `Save`.
4. Set the following permissions:
   - Inboxes: For each GI2 user, select `User Security` -> `Add Principal`, and assign the user access level `Full Control (Owner).`
   - Personal Folders: For each GI2 user, select `User Security` -> `Add Principal`, and assign the user access level `Full Control (Owner).`

Setting Up Attached Data

The 8.1 release introduced new reports that are heavily based on the configuration of user data in your environment. User data is highly customizeable within any given environment. To use the GI2 reports without modifying the universe or measure definitions, you must configure userdata data structures within Genesys Info Mart in a specific manner. The "Configuring Social Media User Data" section in the *Genesys Interactive Insights 8.1 User's Guide* provides a complete example that demonstrates how.

Linking the Universe to Your Data Mart

The GI2 reports call upon measures that were designed using BusinessObjects Universe Designer, hereinafter simply referred to as Designer. These measures are predefined in the GI2 universe that you imported but they are not pre-connected to your specific Genesys data source out of the box. You must

define such a connection and assign it within Designer so that the reports that reference these measures will pull contact center data from your Info Mart.

Note: The GI2_GIM_DB connection that the GI2 installation routine deploys is reserved for Genesys use. Do not use this connection.

Importing the Universe to Designer

Note: For SAP BusinessObjects Business Intelligence Platform (BI) 4.1, refer to *Information Design Tool User Guide* for information on how to import a universe using this tool. This section describes how to input the GI2 universe using Designer.

There are many ways to define database connections. The first step, however, is to import the GI2 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 6 on page 34 shows the 8.1.1 folder selected for the techpubs4 host in this dialog box.

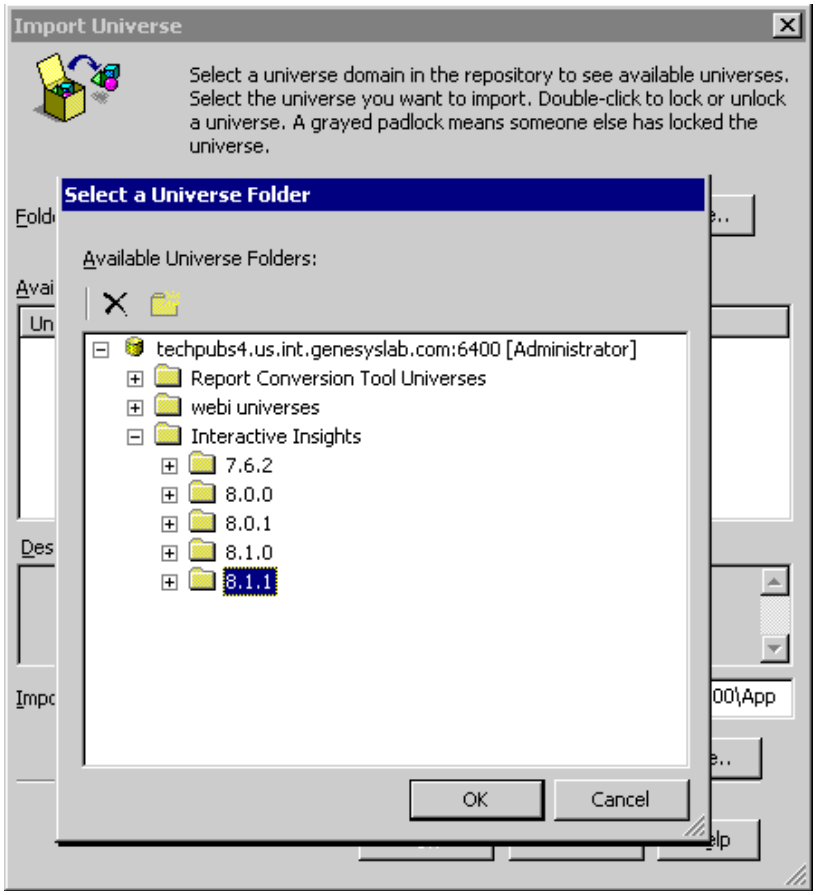


Figure 6: The Root Folder of the BO Repository

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 62 and “Exporting the Universe Back to the Repository” on page 43 for further information.

Defining a New Connection (BO XI 3.1)

Use the following steps to define a connection to link these universe objects to the tables in your Data Mart. This procedure describes the steps for establishing an Oracle Client data source connection.

> **Note:** For Microsoft SQL Server, Genesys recommends that you use the following drivers to configure a connection to the GI2 Universe:
>
> - For Windows, OLE DB drivers
> - For UNIX, JDBC drivers

The steps and the pages of the `New Connection Wizard` might be different for other driver types:

1. From the `Tools` menu, select `Connections`. The `Connections List` page of the Wizard Connection displays.
2. Click the `Add` button to start the `New Connection Wizard`.
3. On the `Welcome` page, click `Next`.
4. At the `Database Middleware Selection` page, type a unique name for your data source connection, select the driver for the RDBMS type of your Genesys data source, and click `Next`. Figure 7 illustrates the creation of the `TechPubs4` connection.
5. At the `Login Parameters` page, specify the connectivity parameters to the desired database schema of your Info Mart, and click `Next`.

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

   > **Note:** This step does not appear for all driver types.

7. Specify any custom parameters at the `Custom Parameters` page, and click `Finish`.

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

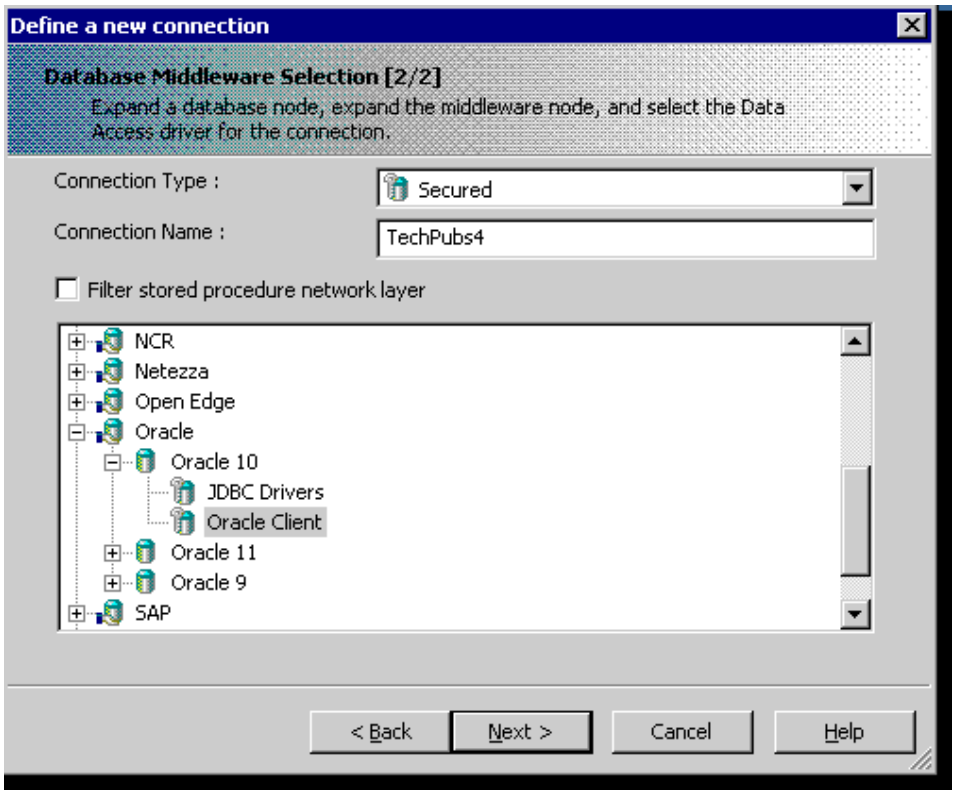


Figure 7: Defining an Oracle Client Connection

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

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

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

   This connection has been defined for your local workstation, but you must assign it to the GI2 universe and export the universe back to the BO repository for the connection to be available to others who might run reports. Refer to the "Connecting to Your Data Source (BO XI 3.1)" and "Exporting the Universe Back to the Repository" sections that follow.

10. Within CMC from the `Connections` section, grant `View on Demand` access for your group to the connection(s).

Connecting to Your Data Source (BO XI 3.1)

In BO XI 3.1 deployments, if you created a connection from the"Defining a New Connection (BO XI 3.1)" section or already have defined a connection to your data source, use it to connect to the GI2 universe:

1. From the `File` menu in Designer, select `Parameters`. The `Universe Parameters` dialog box displays.
2. Select your connection from the `Connection` dropdown list box, test it if you want, and click `OK`.
3. Save the universe (`File` > `Save`).

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

Figure 8 shows a user selecting the `TechPubs4` connection, which was created earlier under "Defining a New Connection (BO XI 3.1)" (Step 4 on page 35).

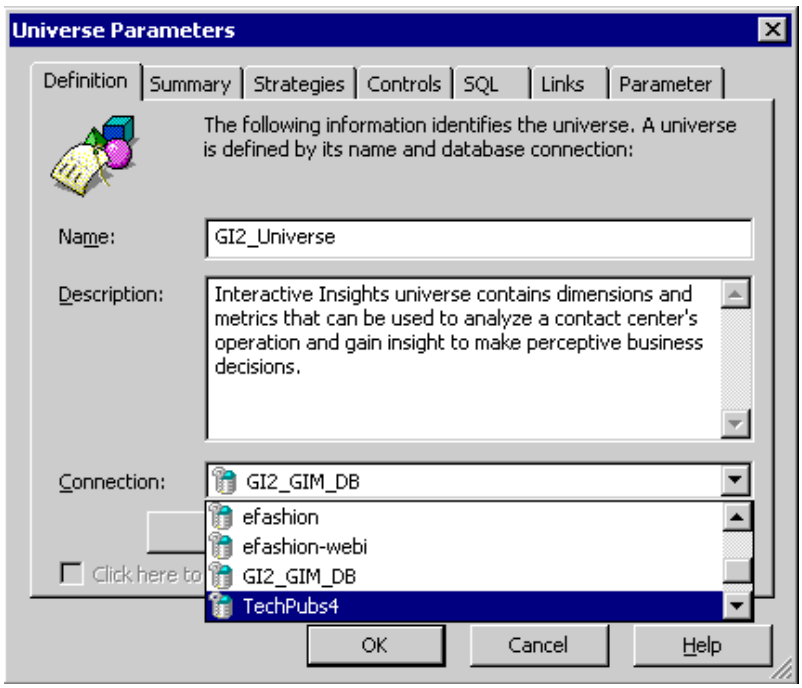


Figure 8: Setting the Connection

Defining a New Connection (BI 4.1)

In BI 4.1 deployments, use this procedure to define a new Connection, which you can use to link the universe objects to the tables in your Data Mart. Alternatively, you can reuse the default Connection by following the steps in "Using the Default Connection (BI 4.1)" on page 39.

1. Open the Information Design Tool.
2. On the `Repository Resources` tab, click `Open session`, or click `+` (Insert), and select `Insert Session`, as shown in Figure 9.

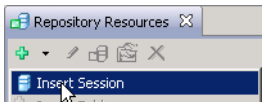


Figure 9: Insert Session

The `Open Session` dialog box appears.

3. In the `System` field, enter the BI instance name. Enter the `User Name` (`Administrator`) and associated `Password`, and click `OK`.
4. Click `+` (Insert), and select `Insert Relation Connection`, as shown in Figure 10. The `New Relational Connection` dialog box appears.

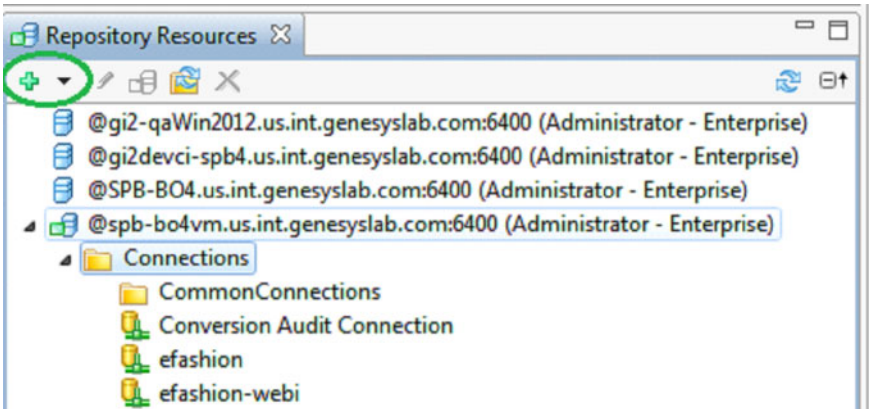


Figure 10: Connections Folder

5. Type a name for the new connection, and click `Next`.
6. Select the appropriate driver for your database middleware, and click `Next`.
7. Enter appropriate connection parameters. The parameters available vary depending on the driver type you selected for the connection; Figure 11 shows parameters for MSSQL server:

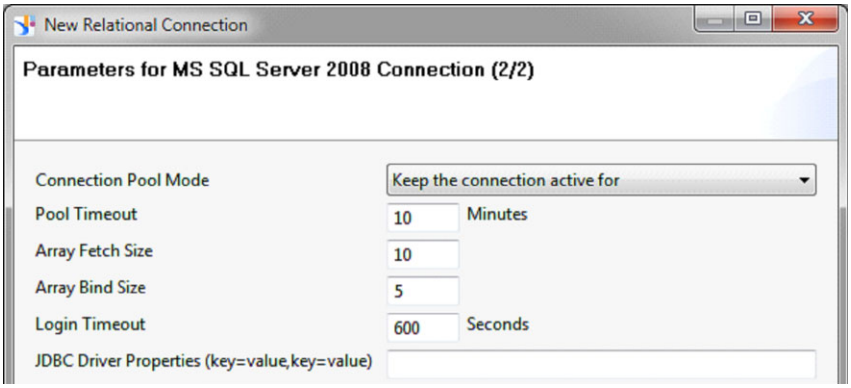


Figure 11: New Relational Connection Parameters

8. Test the connection before clicking `Next`.
9. Click `Finish`.
   The created connection appears in the list of available connections for the BI server, as shown in Figure 12.

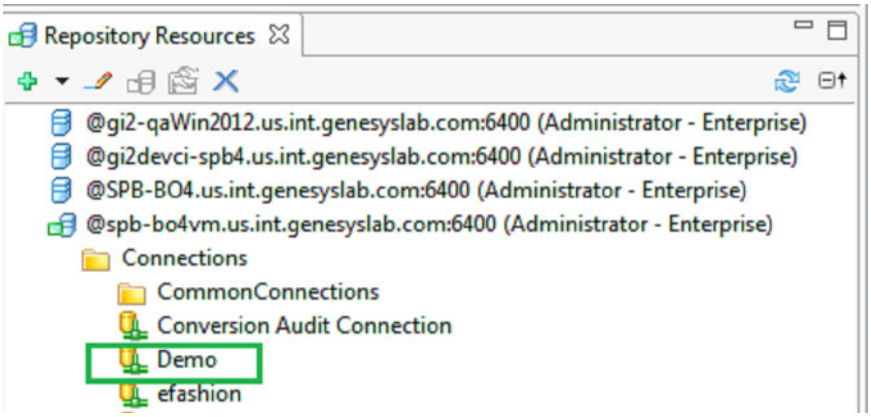


Figure 12: The New Connection

Next, link your connection to the universe by using the steps in "Connecting to the GI2 Universe (BI 4.1)" on page 41.

Using the Default Connection (BI 4.1)

In BI 4.1 deployments, use this procedure to update the default `GI2_GIM_DB` Connection to point to your data source, so that you can link the universe objects to the tables in your Data Mart. Alternatively, you can create a new Connection by following the steps in "Defining a New Connection (BI 4.1)" on page 37.

1. Open the Information Design Tool.
2. Select `File > New > Project`. Enter the `Project Name`, and click `Finish`. A new project is created, and appears on the `Local Project` tab.
3. On the `Repository Resources` tab, click `Insert Session`.
4. In the `System` field, enter the BI instance name. Enter the User name (`Administrator`) and associated password, and click `OK`.

5. Open the `Connections` folder, and select the `GI2_GIM_DB` connection, as shown in Figure 13.

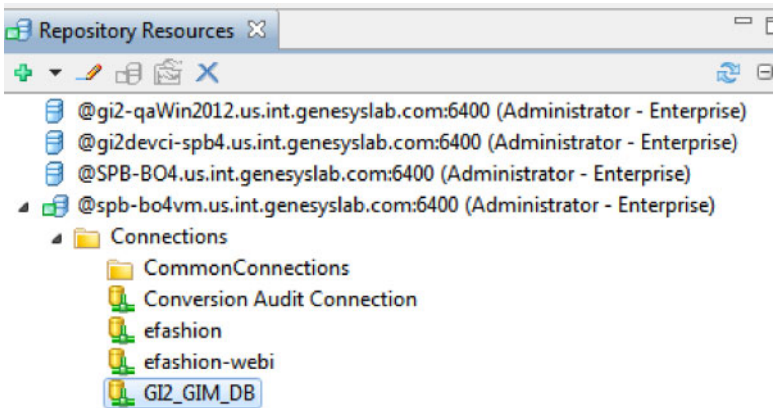


Figure 13: Connections Folder

6. Click the right mouse button and, in the context menu, select `Open item`.
7. Click `Change Driver`, select a driver, and enter appropriate connection parameters.
8. Test the connection, then choose `File > Save` to save the connection.
9. Close the `Connection` tab.
10. Open the folder:
`Universes > GI2_Universe > Interactive Insights > 8.1.4`.
11. Select `GI2_Universe.unx`, click the right mouse button, and in the context menu select `Retrieve Universe`.
12. Select the project created in Step 2, and click `OK`.
13. In your local project folder, open the newly-created folder, which has a name in the format `retrieval-<date>`, such as `retrieval-2014-12-24-19-08-50`, as shown in Figure 14.

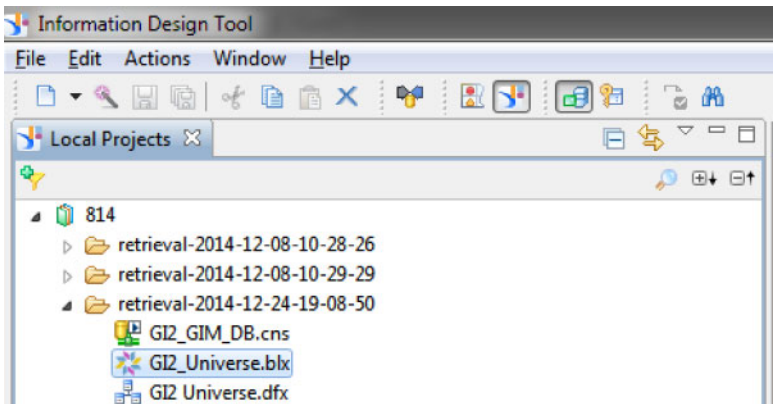


Figure 14: Local Projects

14. Select the `GI2_Universe.blx` element, click the right mouse button and from the context menu, select `Publish > To Repository`.

15. In the Check Universe Integrity dialog, click Next.
16. Open the folder:
    GI2_Universe - Interactive Insights\8.1.4\
    and select GI2_Universe.unx.
17. Click Finish
    The message Do you want overwrite universe? appears.
18. Click Yes, and close the dialog box.

Next, link your connection to the universe by using the steps in "Connecting to the GI2 Universe (BI 4.1)" on page 41.

Connecting to the GI2 Universe (BI 4.1)

In BI 4.1 deployments, once you have created a Connection ("Defining a New Connection (BI 4.1)" on page 37 or "Using the Default Connection (BI 4.1)" on page 39), use this procedure to link the universe objects to the Connection.

1. Open the Information Design Tool.
2. Select File > New > Project. Enter a Project Name, and click Finish. A new project is created, and appears on the Local Project tab.
3. On the Repository Resources tab, click + (Insert) > Insert Session, as shown in Figure 15. The Open Session dialog box appears.

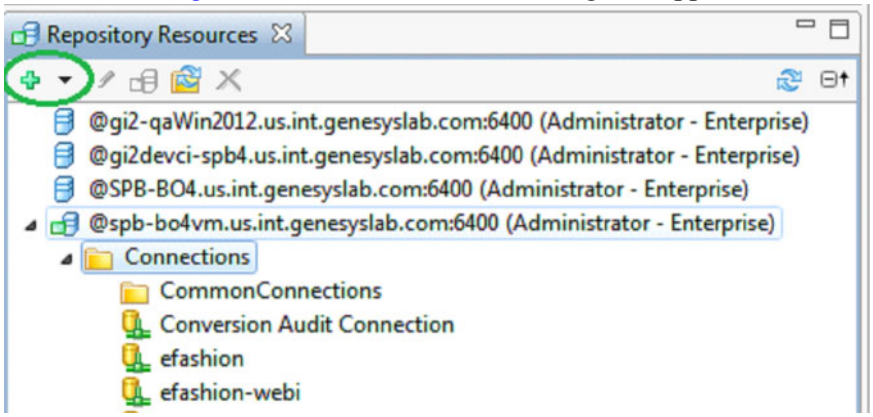


Figure 15: Connections Folder

4. In the System field, enter the BI instance name. Enter the User Name (Administrator) and associated Password, and click OK.

5. Still on the Repository Resources tab, right-click on file: Universes > GI2_Universe > Interactive Insights > 8.1.4 > GI2_Universe.unx and select Retrieve Universe, as shown in Figure 16. The Select A Local Project dialog box appears.

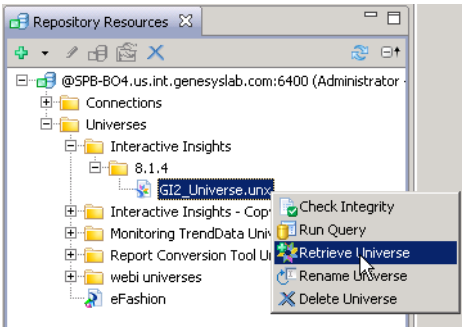


Figure 16: Retrieve Universe

6. Select the project created in Step 2, and click OK. On the Local Project tab, the newly created folder appears with a name in the format retrieval-<date> (such as retrieval-2014-12-24-19-08-50).
7. Open the newly-created folder, right click the GI2_GIM_DB.cns element, and select Open, as shown in Figure 17. The General Information tab for the GI2_GIM_DB.cns element appears.

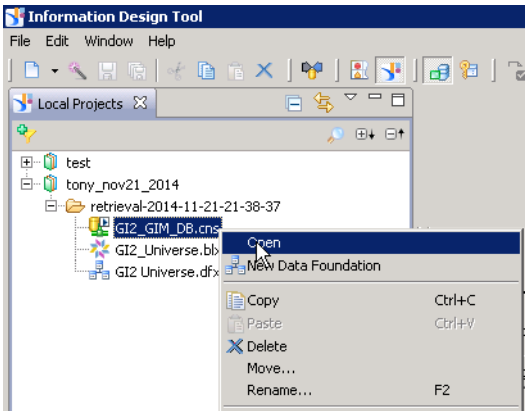


Figure 17: Open GI2_GIM_DB.cns

8. Click Change Connection. The Change Connection dialog box appears.
9. Click Change Connection to verify that the connection is working correctly.
10. Click File > Save to save the connection.
11. On the Local Projects tab, right-click on the GI2_Universe.blx element, and select Publish > To Repository.
12. The Check Universe Integrity dialog box appears. Click Next, and on the next page, select the file GI2_Universe > Interactive Insights > 8.1.4 > GI2_Universe.unx
13. Click Finish. The Do you want to overwrite universe? confirmation dialog appears. Click Yes, and close the dialog box.

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 18.
2. From the `Groups` frame, select all of the groups to which this connection applies.
3. From the `Universes` frame, select the name of your universe (for example, `GI2_Universe`), and click `OK`.

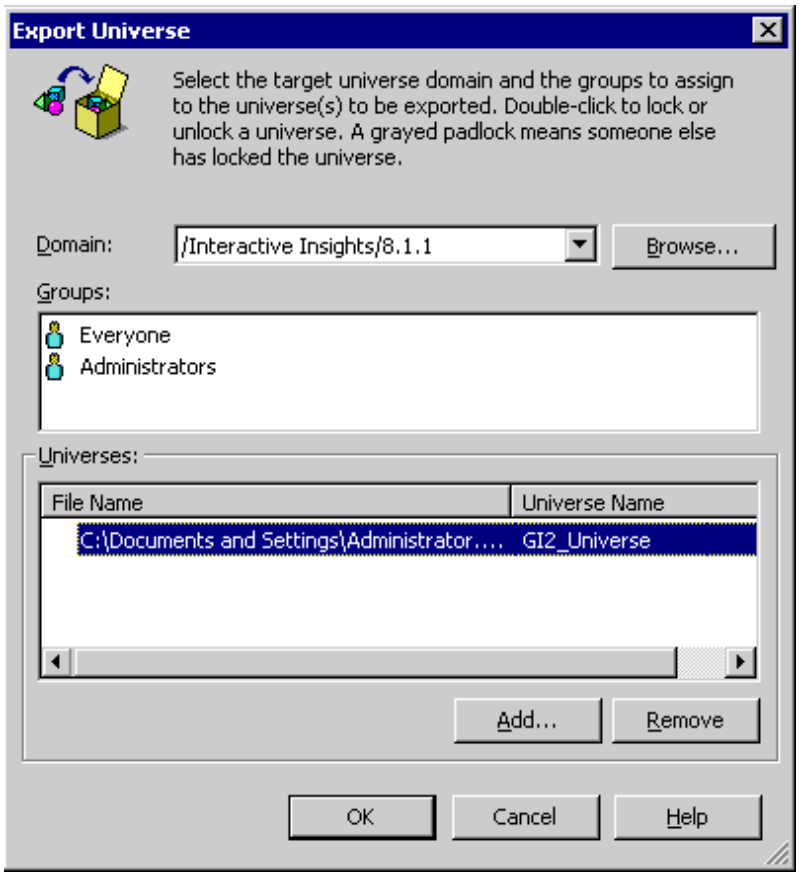


Figure 18: Exporting Changes Back to the Repository

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

Manually Setting Up GI2 Access Levels, Groups, and Permissions

The GI2 installation routine silently deploys the GI2 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 GI2 groups and users (and passwords):

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

If you want to import these objects or change their permissions manually, as the BO administrator, you can either use the Import Wizard to import these objects with their permissions applied to universe elements (see "Manually Importing Objects and Data Elements" on page 73), or create the objects yourself from scratch and assign permissions to various objects by following the instructions in these sections:

- "Setting Up Access Levels" on page 45
- "Creating GI2 Groups" on page 47
- "Hiding Unused Folders" on page 48
- "Setting Permissions for BO Objects" on page 50

Note: If your installation of GI2 was successful, prior to importing the universe manually by using the Import Wizard, remove any GI2 objects that exist in the BO repository, so as to avoid creating duplicate objects (following Step 3 on page 104).

After importation, you can view the GI2 users and groups in the Central Management Console (CMC). Figure 19 shows the added groups.

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

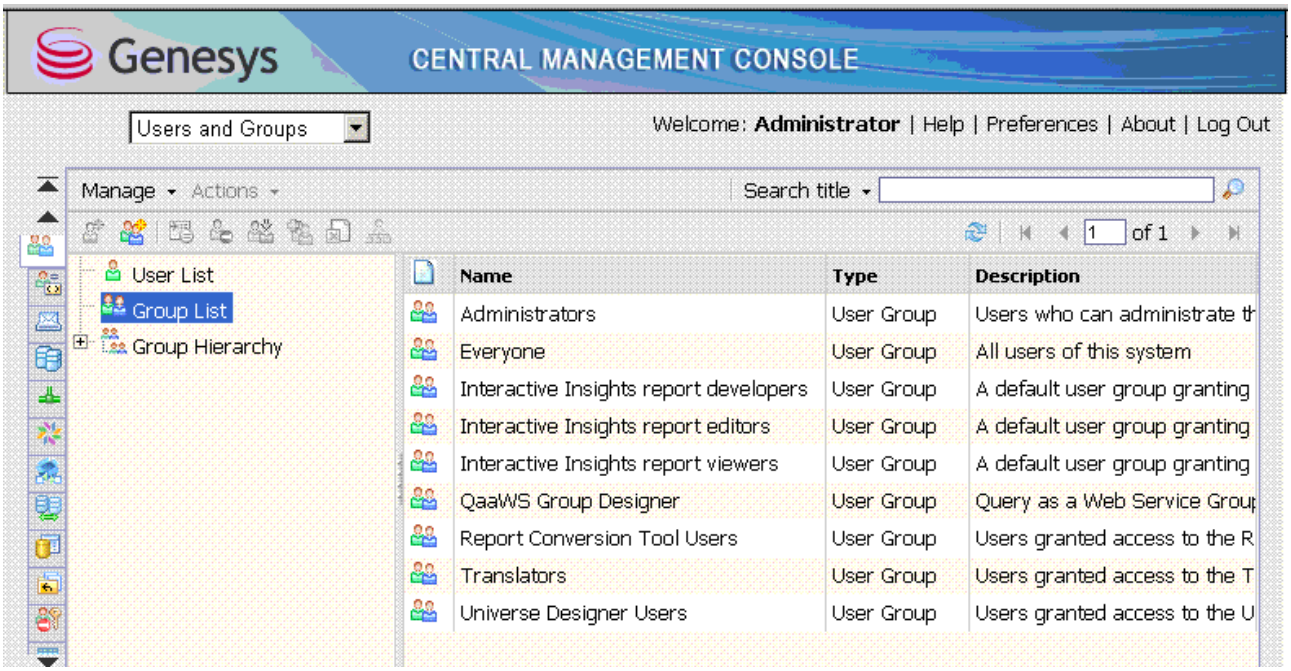


Figure 19: Viewing the Default BO and GI2 Groups in CMC

Setting Up Access Levels

If you opt not run the Import Wizard to deploy the Interactive Insights report access levels (which are groupings of permissions that are applied to groups and/or users), as the administrative user within the CMC, you can create them manually. GI2 predefines the following access levels:

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

Though these access levels correspond to the three GI2 groups, the access levels are progressive—that is, they build upon the access levels of others.

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

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

   (In Table 1, a checkmark signifies that a right was selected; an `X` signifies that the right was blocked for the indicated access level.)
6. Click `Close` to save the definition.

7. Repeat Steps 2–6 for the remaining two GI2 access levels.

Table 1: Definitions of the Predefined Interactive Insights Access Levels

Collection	Type	Name of Right	Access Levels*		
			D	E	V
System	Connection	Data Access	✓	✓	✓
General	General	Add objects to folders that the users owns	✓	✓	
		Add objects to the folder	✓	✓	
		Copy objects that the user owns to another folder	✓	✓	
		Copy objects to another folder	✓	✓	
		Delete instance	✓		
		Delete instances that the user owns	✓		
		Delete objects	✓		
		Delete objects that the user owns	✓		
		Edit objects	✓	✓	
		Edit objects that the user owns	✓	✓	✓
		Modify the rights users have to objects	✓		
		Modify the rights users have to objects that the user owns	✓		
		Schedule document that the user owns			✓
Application	WebI	Data Tracking: Enable for users			✕
		Data Tracking: Enable format display changes by users			✕
		Enable drill mode		✓	✓
		Enable formula and variable creation			✕
		Enable HTML Report Panel		✓	✕
		Enable interactive HTML viewing (if license permits)			✕
		Enable Java Report Panel			✕
		Enable Query - HTML			✕
		Extend scope of analysis		✓	✓
		Edit this object		✓	
		Interactive: Formatting - Enable toolbar and menus			✕
		Interactive: General - Ability to hide / show toolbars			✕
		Interactive: General - Edit 'My Preferences'			✕
		Interactive: General - Enable right click menu			✕
		Interactive: Left pane - Enable available objects, tables and charts			✕
		Interactive: Left pane - Enable data summary			✕
		Interactive: Left pane - Enable document structure and filters			✕
		Interactive: Left pane - Enable document summary			✕
		Interactive: Reporting - Apply and remove existing alerts			✕
		Interactive: Reporting - Create and edit break			✕
		Interactive: Reporting - Create and edit predefined calculation			✕
Application	WebI	Interactive: Reporting - Create and edit report filter			✕

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

Collection	Type	Name of Right	Access Levels*		
			D	E	V
		Interactive: Reporting - Create and edit sort			×
		Interactive: Reporting - Insert and remove report, table, chart and cell			×
		View SQL			×
		Web Intelligence Rich Client: Save a document locally on the file system			×
		Web Intelligence Rich Client: Create a document			×
		Web Intelligence Rich Client: Enable a client to use it			×
		Web Intelligence Rich Client: Export a document			×
		Web Intelligence Rich Client: Import a document			×
		Web Intelligence Rich Client: Print a document			×
		Web Intelligence Rich Client: Save a document for all users			×
		Web Intelligence Rich Client: Send by mail			×
Content	WebI	Edit Query	✓		
		View SQL	✓		
		Export the report's data			✓
		Refresh List of Values			✓
		Refresh the report's data			✓
		Save as CSV			✓

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

Creating GI2 Groups

In addition to the Interactive Insights access levels, the Import Wizard also deploys GI2 user groups. You can create them manually and add users as follows:

1. Select the `Users and Groups` section and, over the `Group List` item, right-click `New Group`.
2. At the `Create New User Group` page, type the following, and then click `OK`:
   a. In the `Group Name` field, type `Interactive Insights report developers`.
   b. In the `Description` field, provide an appropriate description.
3. Right-click `Interactive Insights report developers`; then, from the context menu that appears, select `User Security`.
4. Click the `Add Principals` button.
5. On the `Add Principals` page, mark the `Users` radio button.

6. From the Available users/groups list box, select Developer and any other user who belongs to this group, and move it to the Selected users/groups list box.
7. Click Add and Assign Security, and click OK twice.
8. Click Close to close the user security properties.
9. Repeat Steps 2–8 to create the following user groups:
   - Interactive Insights report editors
   - Interactive Insights report viewers

To maintain flexibility, permissions (other than the default) are not assigned to the GI2 users or groups. Instead, Genesys recommends that you assign permissions directly to the objects that users access. This procedure is described in "Setting Permissions for BO Objects" on page 50.

Hiding Unused Folders

BusinessObjects Enterprise (BO) XI 3.1 software includes folders that are not used by GI2. 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 GI2 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 20.

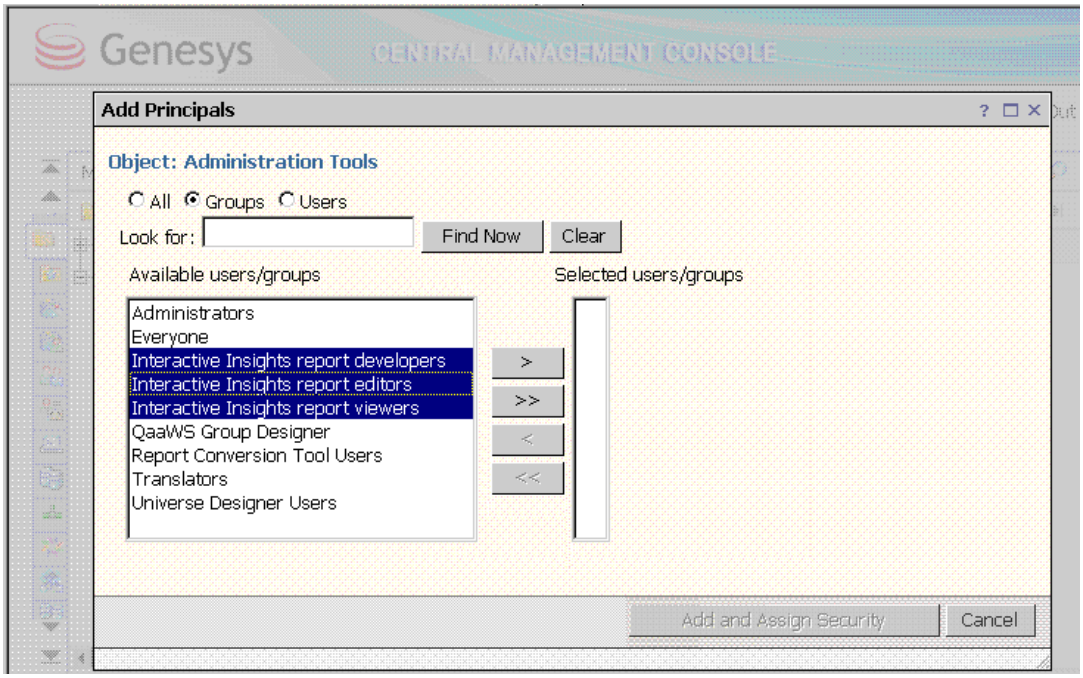


Figure 20: Adding Principals to a Folder's Security Profile

3. Mark the `Groups` radio button.
4. From the `Available users/groups` list box, select the three GI2 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 21.

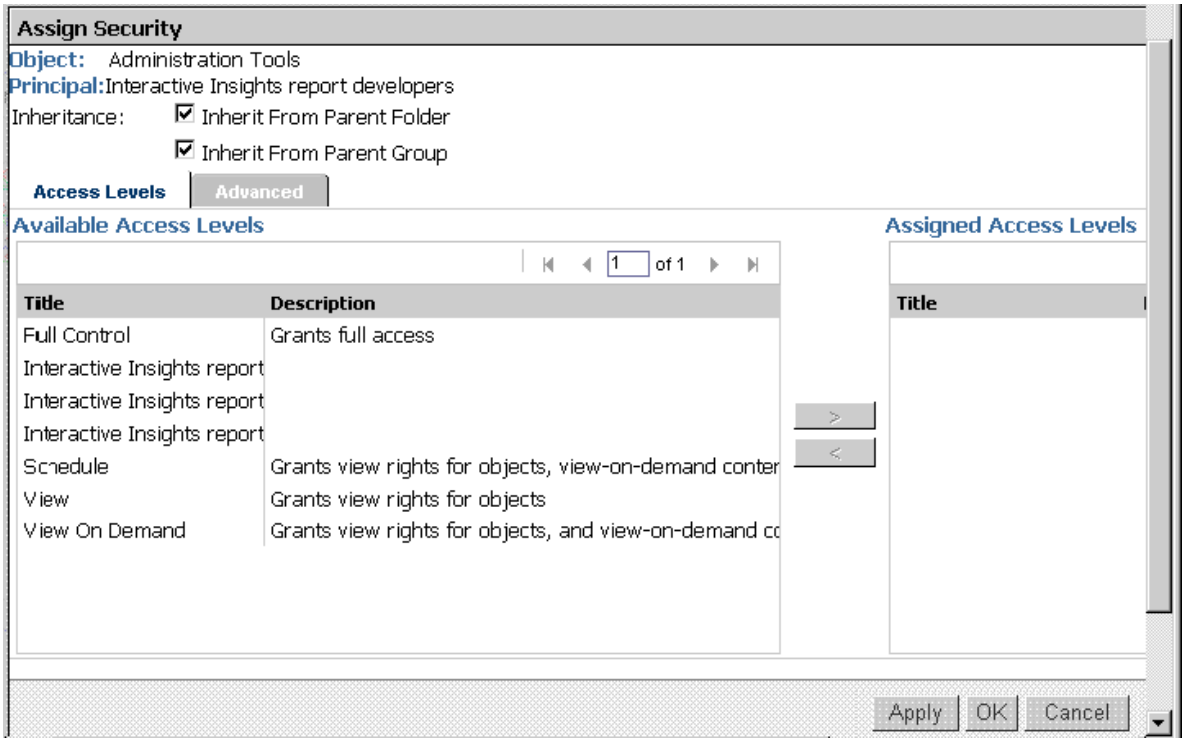


Figure 21: Assigning Access Levels to Folders for Selected Principals

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

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

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

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

8. Click `Close`.

With these changes applied to each folder, the folders will be invisible to GI2 users within InfoView and Web Intelligence. Note that administrative users, having full control, will continue to see them.

Setting Permissions for BO Objects

You can manually set permissions on the objects used by GI2, including the universe, the Interactive Insights folder and connection, and even the InfoView and Web Intelligence applications. Table 2 on page 51 lists the user security properties of objects that the GI2 installation routine sets. To set these

manually, perform the following steps within Central Management Console as the administrative user:

1. You can set top level security for root objects or user security for other objects:
   - To set top level security, open the appropriate CMC section, select `Manage > Top-Level Security > All <Objects>`.
   - To set user permissions, open the appropriate CMC section, right-click the desired object from that section, and select `User Security`.
2. Click the `Add Principals` button, and mark the `Groups` radio button.
3. From the `Available users/groups` list box, select the groups indicated for the object from Table 2 and move them to the `Selected users/groups` list box.
4. Click the `Add and Assign Security` button, either clear or mark the `Inherit From Parent Folder` and `Inherit From Parent Group` boxes as indicated in Table 2 for the object, and apply your changes.
   a. Under the `Access Levels` tab, select the appropriate access level from the `Available Access Levels` list, and move it to the `Assigned Access Levels` list:
   b. Apply your changes, and click `OK`.
5. Click `Close` to close the user security properties.

Table 2: Mapping of Access Levels to BO Objects

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

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

CMC Section	Object Name	Principal*	Inheritance From ...		Access Level†					
			Parent Folder	Parent Group	D	E	V	Full	V	VOD
Applications	Web Intelligence	Developers	×	×				×		
		Editors	×	×		×				
		Viewers	×	×			×			
	InfoView	Developers	×	×						×
		Editors	×	×						×
		Viewers	×	×						×
	Designer	Developers	×	×				×		
Folders	< InfoView root >	Developers	×	×					×	
		Editors	×	×					×	
		Viewers	×	×					×	
	Interactive Insights	Developers	✓	×	×	×	×			
		Editors	✓	×		×	×			
		Viewers	✓	×			×			

*** Principals**

Interactive Insights report developers
Interactive Insights report viewers
Interactive Insights report editors

† Access Levels

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

Setting Data-Access Restrictions for Multi-Tenant Environments

In addition to the permissions that you can set within CMC to control access to various BO 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. BO 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 GI2 reports. This is a particularly useful feature when it is applied to a

data source that stores data for more than one tenant. For instance, within one universe, an administrator can define several connections —each of which accesses a different tenant view within the same Info Mart—and then create and apply connection restrictions to each tenant to ensure that its users see only the data that is pertinent to that tenant.

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

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

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

Note: Genesys Info Mart supports several methods of configuring multi-tenant environments, including:

- A separate schema per tenant.
- A separate schema for each group of tenants.
- One database/one schema for all tenants (where each tenant can see other tenants' data).

Configuration depends largely on the capabilities that are provided by your chosen RDBMS and on the data access security measures that are established within your enterprise. Please refer to the *Genesys Info Mart 8.1 Deployment Guide* for further information.

One possible configuration, however, is particularly noteworthy for a Microsoft SQL 2005 RDBMS. In the scenario in which a separate schema has been created within one database for each tenant, you must ensure that individual tenant logins map to the respective database owner for the tenant schema or that the default schema for each tenant login matches that of the owner for that schema. Furthermore, this login cannot be `sysadmin`; otherwise, elements in the GI2 universe might point to an unintended set of objects in Info Mart.

Creating Users and Groups in Multi-Tenant Environments

The steps that are provided on page 44 describe the procedures for creating GI2 users and groups and assigning users and groups to various repository elements. The naming convention that was used for the users and groups and the presentation of the steps were biased toward setup of a single-tenant

environment. However, with the exception of the names that you choose for users/groups, the procedures are identical for multi-tenant environments.

1. If you have not done so already, complete the steps that are defined in the following sections to add GI2 views to each tenant schema (or database, as applicable) and to define connections to them, respectively:
   - "Utility Views Specific to GI2" on page 30
   - "Linking the Universe to Your Data Mart" on page 32

   Note: When you are naming data-source connections (Step 4, page 35), consider choosing tenant-identifying names, such as `Tenant1Connection` or `GI2_Tenant2_Oracle10g`.

2. To set up users and groups for your tenants, follow the steps that are provided in "Manually Setting Up GI2 Access Levels, Groups, and Permissions" on page 44—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 50) 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 22.

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

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

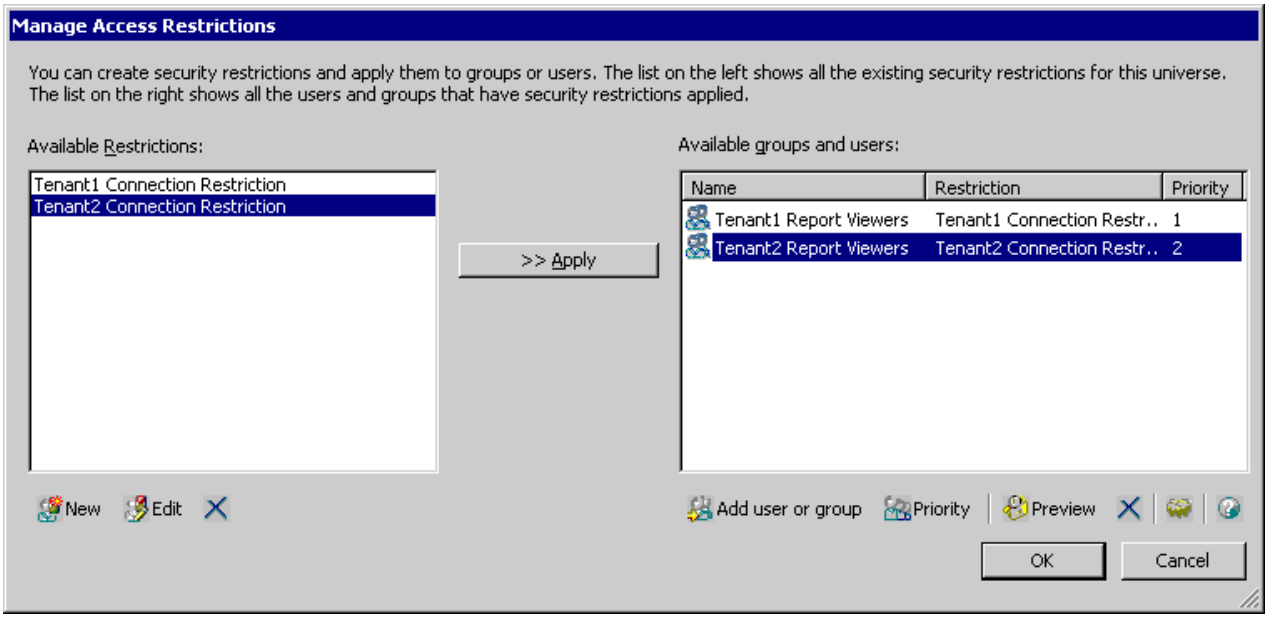


Figure 22: The Manage Access Restrictions Dialog Box Showing Two Restrictions

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

   Figure 23 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.

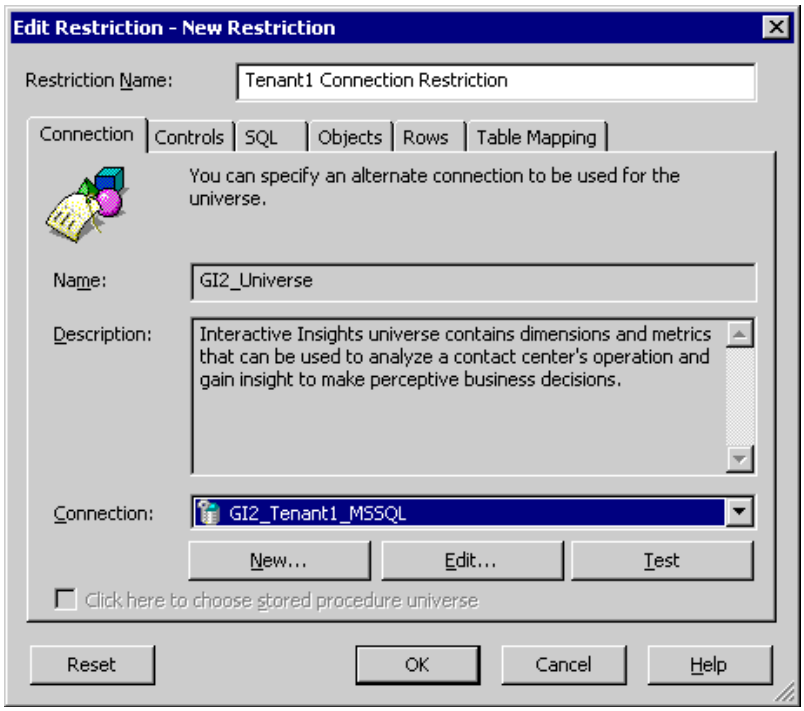


Figure 23: Creating a Connection Restriction for Tenant1

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

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

7. Under the Available groups and users frame of the Manage Access Restrictions dialog box, click Add user or group to open the Select Users and Groups dialog box.
8. From the Available groups and users frame, select all of the users whose access to this universe you want to restrict, and move them to the Selected groups and users frame. Click OK.
9. One by one, assign the available restrictions that you created to the appropriate group and/or user.
10. Click Ok to save your changes, and close the Manage Access Restrictions dialog box.

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 *SAP BusinessObjects XI 3.1 Universe Designer* guide.

Setting Integrated Data Access Restrictions

Beginning in release 8.1.4, data access restrictions are integrated with data access roles (this functionality is also available in 8.1.1 releases beginning with 8.1.104). These restrictions control access to objects within the Info Mart database so that BO users who are members of BO groups with associated access restrictions see data only for appropriate contact center resource groups (Agent Groups or Queue Groups that are configured in the Configuration Layer). There are two types of these restrictions:

- **Static Access Restrictions:** Allow you to configure a list of objects for which no data appears when reports are viewed by users who are members of restricted groups. For example, you can use this feature to prevent group members from viewing data for 'system' objects (such as Queue/Queue Groups).

- **Dynamic Access Restrictions:** Allow you to restrict access to data based on each BO user name and attributes you configure to describe the user's geographical location, line of business, or organizational role. For example, you can use this feature to ensure that a supervisor sees data only from agents in specified locations, on specified teams.

Integrated data access restrictions are supported only in release 8.1.4 and in 8.1.1 releases beginning with 8.1.104. Note that:

- In 8.1.4 deployments: default restrictions are defined (`Static Access Restriction` and `Dynamic Access Restriction`), together with a default group (`Interactive Insights access restrictions`) that has these two restrictions applied.
- In 8.1.1 releases (8.1.104 and later): default restrictions are defined (`Static Access Restriction` and `Dynamic Access Restriction`), with a default group (`Interactive Insights access restrictions)` that has `Static Access Restriction` applied.

Custom Data Access Restrictions

You can customize integrated data access restrictions by configuring the following Data Access Visibility (DAV) attributes, which are available on each object's `Annex` tab:

- ORG (Organizational Role)
- GEO (Geographic Location)
- LOB (Line of Business)

You restrict access to data by defining values on the `Annex` tab, as follows:

- For each Person: BO login, plus one or more DAV attributes
- For each contact center group: one or more DAV attributes

As long as a user has at least one DAV attribute that matches a group, then that user can see data from that group.

For example:

- `Agent Group1` has the following annex value: `RPT_GEO=Daly City`
- `Agent Group2` has the following annex value: `RPT_GEO=San Francisco`
- `Agent SuperVisor1` has the following annex value: `RPT_GEO=Daly City`
- `Agent SuperVisor2` has the following annex value: `RPT_GEO=San Francisco`

  When `Agent SuperVisor1` runs a report, the report contains data from `Agent Group1`, but not data from `Agent Group2`. The reverse is true for `Agent_Supervisor2`

Data access restrictions use a small amount of system resources, so configuring them can result in a slight decrease in system performance.

Configuring Access Restrictions

You define DAV attributes using Configuration Manager, and define access restrictions using the Information Design Tool.

Note: By default, in Configuration Manager, the Annex tab is hidden. Open View > Options, and ensure that Show Annex tab in object properties is selected.

1. Using Configuration Manager, perform the following steps for each user (Person):
   a. If it is not already present, add the RPT section.
   b. Within the RPT section, add an option with:
      - Option Name = BOE_USER
      - Option Value = <username>
   c. If they are not already present, add one or more of the following sections:
      - RPT_GEO
      - RPT_ORG
      - RPT_LOB
   d. Within each of the sections you added in Step c, assign suitable options. For example, within the RPT_GEO section, you might add an option and assign it an Option Name that describes the geographical location of a group, such as Daly City.

Note: Neither Genesys Info Mart nor GI2 processes the Option Value for options in the [RPT_GEO], [RPT_ORG], or [RPT_LOB] sections, so you can leave the option value blank, and enter only the option name (unless the Configuration Server installed in your environment requires a value, as is the case in Configuration Server 7.6 and earlier).

2. Using Configuration Manager, perform the following steps for each contact center Group (Agent Groups and DN [ACD Queue] Groups):
   a. If they are not already present, add one or more of the following sections:
      - RPT_GEO
      - RPT_ORG
      - RPT_LOB
   b. Within each of the sections you added in Step a, assign suitable options. For example, within the RPT_GEO section, add an option and assign it an Option Name that describes the geographical location of a group, such as Daly City.

3. Using the Information Design Tool (BI 4.1) or Designer (BO XI 3.1), assign Access Restrictions to the relevant BO groups.

   In BO XI 3.1 Designer, you can apply only one access restriction to each group. If your deployment has BO XI 3.1, and you want to apply more than one access restriction (for example, both the default `Static Access Restriction` and `Dynamic Access Restriction`), you must:

   a. Create two or more groups (or create one group, and for the other, use the default group `Interactive Insights access restrictions`).

   b. Assign one access restriction to each group (using the default access restrictions, custom restrictions that you create, or a combination of the two).

   c. Organize a Group Hierarchy, so that one group is a sub-group of the other.

      You can assign priorities to the access restrictions associated with each group, and BO applies these access restrictions starting with the highest-level priority within the hierarchy.

For more information about working in Genesys Configuration Manager, see *Framework 8.1 Configuration Manager Help*.

Translating the Universe, GI2 Reports, and BO GUI

Genesys provides installation packages of the GI2 product in more than one language, as does BO. The steps to install BO in other locales are described in the *SAP BusinessObjects Enterprise XI 3.1 Installation Guide for Windows/UNIX*. To display the reports and use the universe and BO in a language other than English, complete the following steps:

1. Change the host's browser locale.
2. Install the target BO language pack(s). (Refer to "Installing language packs" in the *SAP BusinessObjects Installation Guide*.)
3. Within CMC, change the BO product locale (see Figure 24).

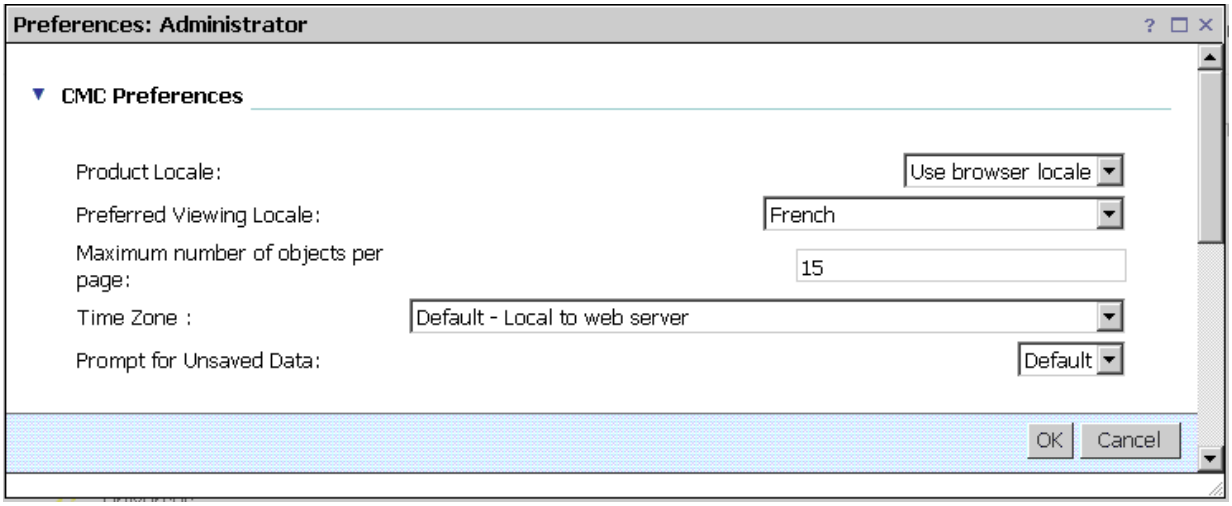


Figure 24: CMC Preferences – Changing the Product Locale

4. If you are installing the Turkish or Russian GI2 language pack, install it now, and skip the remaining steps in this procedure. For all other languages, continue with Step 5.

   Note: Check the appropriate GI2 Language Pack Release Note to ensure that the release of the language pack you plan to install is compatible with the installed release of GI2.

5. Import XLF files of the translated universe and reports into the Business Objects repository.

   For each supported language, Genesys provides one translated file of the universe and several translated files of the GI2 reports (one translated file for each report) in XML Localization Interchange File Format (XLIFF)—for example, `Contact List Effectiveness Report.xlf`. Using a three-step process, you must identify each translation file to the BO repository:

   a. Within Translation Manager (a standalone BO application), import the untranslated report [a Web Intelligence document (`*.wid`)] and `GI2_Universe.unv` from CMS.

   b. Import each Genesys-provided XLF file into Translation Manager. Figure 25 shows the dialog box through which you perform the import.

   c. Save and export the results back to CMS.

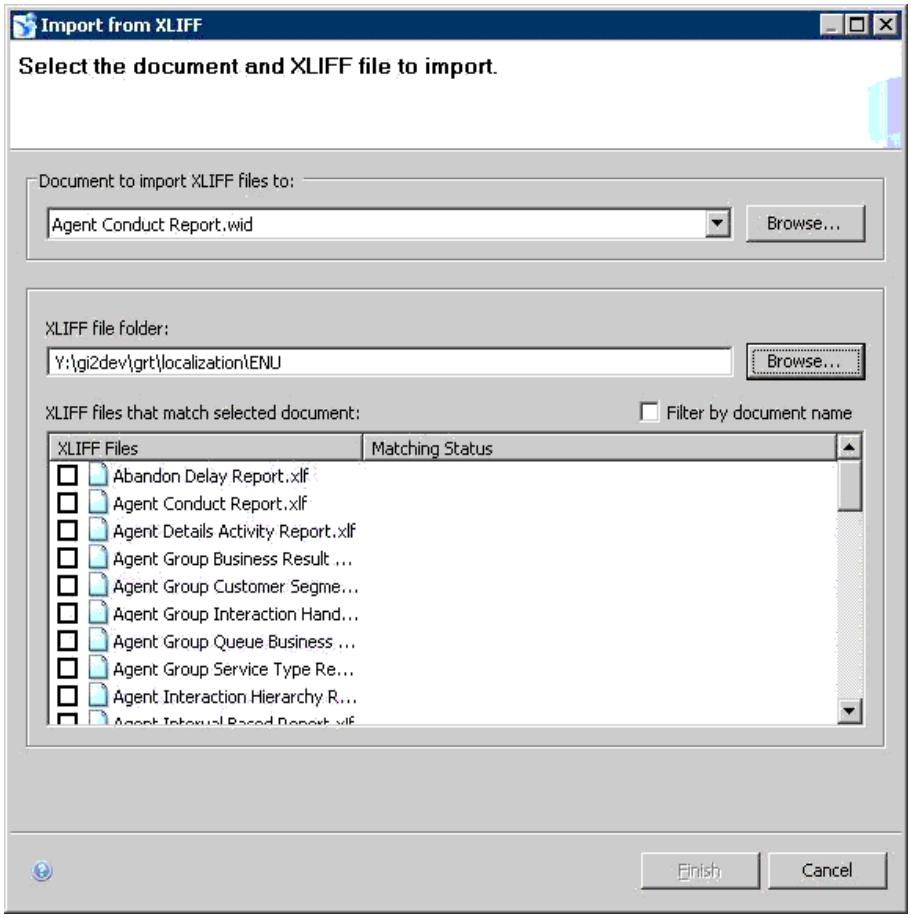


Figure 25: Translation Manager: Import from XLIFF Wizard

6. Rename the GI2 reports (to their translated equivalents) within InfoView.

   Neither within the XLF files nor within Translation Manager can the names of Web Intelligence documents be translated. Within InfoView, you must rename them manually.

7. Finally, rerun and save each report so that the new, translated resources will be picked up.

   You have now translated the names of universe objects (the names and descriptions of measures, dimensions, conditions, prompts, contexts, and the universe object itself) and report elements (including labels, report headers, variables, and user prompts) as well as the BO user interfaces.

8. To translate custom reports and universe objects, you must use Translation Manager. Refer to the BusinessObjects *Translation Manager* help file for information on how to use Translation Manager.

Customizing Measure Definitions

Genesys supports limited customization of the following GI2 measures:

- In the `Activity` class:
  - `Avg Handle Time`
  - `Handle Time`
- In the `BA Customer` class
  - `% First Response Time Service Level`
  - `% First Response Time Service Level 80`
- In the `Queue` class:
  - `% Accepted`
  - `% Accepted 80`
  - `Avg Handle Time`
  - `Handle Time`
- In the `Summarized State` class
  - `% Occupancy`

You can redefine these measures within Designer as prescribed within each measure's properties within the universe. Refer to the *Genesys Interactive Insights 8.1 User's Guide* for information about how to customize measures.

After you have customized measure definitions, be sure to export the universe back to the BO repository by following the steps on page 43.

Chapter

4 Installing Genesys Interactive Insights

If you installed BusinessObjects (BO) software prior to installing Genesys Interactive Insights (GI2), follow the instructions provided in this chapter in order to install GI2. At your option, however, you can also install BO software, silently, during installation of GI2. This chapter describes this deployment scenario also.

In addition, GI2 requires connection to an 8.1 Info Mart. This database—although not required for GI2 installation—should be regularly populated by a Genesys Info Mart 8.1 application. Refer to the *Genesys Info Mart User's Guide* and *Genesys Info Mart Deployment Guide* for this information. Genesys Info Mart 8.1 must be properly configured and installed before GI2 runs the aggregation process. The Reporting and Analytics Aggregates (RAA) documentation set describes this aggregation option of Genesys Info Mart.

This chapter contains the following sections:

After you have installed GI2, perform the additional steps that are described in Chapter 3, "Setting Up the Environment," on page 29 to ready the universe for report users.

Overview of the Installation Routine

Beginning with the GI2 8.0 release, in lieu of automatically deploying GI2 to your environment and within the BO repository, when invoked, the installation routine offers you the option to copy the installation script and supporting files to a designated location for manual deployment at a later time. This option provides you with more control and visibility into the inner workings of the installation routine.

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

- Copies (to the Interactive Insights root folder) the `\agg` folder which holds RAA.
- Imports the GI2 universe, folder, reports, connection, measure maps, and PDF documents into the BO repository.
- Defines different users and groups within BO.
- Updates the program registry on Microsoft Windows platforms.

These same actions are performed when you manually install GI2 after choosing the copy-only option.

If, for any reason, the installation exits without successfully installing GI2 or without importing the GI2 universe, folder, or reports, you can review the contents of the `deploy_unv_rep.log` file (which is located in the Interactive Insights root directory), correct the error, and rerun the deployed installation script. (This log file is not produced for GI2 8.1.3 or 8.1.4 releases.) Refer to "Application Files" on page 107for the names of the application files that are deployed. This file is only produced only if BO software has been installed.

Note: Unlike most other Genesys applications, GI2 is neither configured as an application within Genesys Configuration Server nor started (nor stopped) by using the Genesys Solution Control Interface.

Prerequisites

You can install multiple instances of GI2 on the same host. To install GI2, the following prerequisites must be met:

- BO software must be installed on the same host where GI2 will be installed—whether manually (prior to GI2 installation) or silently (for GI2 8.1.0 or 8.1.1 installations only; GI2 8.1.3 and 8.1.4 do not provide a silent installation). Refer to Chapter 2, "Which BO Components Must Be Installed?," on page 19 for additional information.

- You must connect to the BusinessObjects Central Management Server (CMS) as `Administrator` and the BO servers must be running.

  Tip: If you installed BO prior to installing GI2, consider running the BusinessObjects Diagnostic Tool and addressing any issues encountered.

- You must have the GI2 8.1 installation package (and the BO installation package for deployment of both applications).
- Your operating-system version must comply with a version that is supported by BO.

In addition, before you operate the GI2 reports, you must have access to an Info Mart schema that is populated by Genesys Info Mart 8.1. Refer to the *Genesys Info Mart 8.1 Deployment Guide* or the *Genesys Migration Guide* for information that pertains to configuring, installing, or upgrading these products. Although the installation routine does not check for this, the BO 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 pre-existing GI2 universe, Genesys recommends, as a precaution, that you back up any GI2 universes that might exist in the BO repository before you install GI2 anew; the installation routine *might* overwrite a pre-existing `GI2_Universe`, regardless of the folder in which it resides. One way to accomplish this is to export the universe to either:

- A BIAR (Business Intelligence Archive Repository) file (GI2 8.1.0–8.1.1)
- An LCMBIAR file (GI2 8.1.3/8.1.4)

and store it for safekeeping. Refer to BO documentation for instructions on how to export the universe to these formats.

Installing GI2 on UNIX

Instructions for BO XI 3.1

1. In the directory into which you copied the GI2 installation package (or from the Genesys Interactive Insights 8.1 DVD), locate the `install.sh` shell script.
2. Run this script from the command line by typing: `sh install.sh`
3. When prompted to do so, indicate whether to copy only the GI2 installation files: `y` or `n`.

If you select `y`, the installation routine copies the files that are needed to install GI2 manually to the current directory. You will have to manually deploy the GI2 universe and reports to the BO repository and set up groups and user permissions.

If you select `n`, proceed to Step 4.

4. When prompted to do so, indicate whether to deploy GI2: `y` or `n`.

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

5. When prompted, indicate whether to install BO software: `y` or `n`.

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

   Note: BO software must be installed so that the GI2 universe, folder, and reports can be deployed to the BO repository. If you do not install BO at this point, you must have the location of BO software at hand in order to proceed past Step 8.

6. If you selected to install BO at Step 5, type the full path of the BO installation files; otherwise, skip to Step 8. This path cannot contain spaces.

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

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

   Notes: This keycode is:
   - Case insensitive
   - Not dependent on the operating system platform
   - Specific to Genesys-provided BO software

   In addition, the BO XI 3.0 keycode will work for Genesys-provided BO XI 3.1 software.

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

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

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

10. When prompted, specify a password for `Administrator`. Genesys recommends that you do not leave the password null.

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

    The host name you specify cannot contain underscores (_), periods (.), or slashes (/ or \). Go back to Step 9, if you responded `n` at Step 4.

12. Type the port for the BO Intelligence Agent, or accept the default (`6410`).
13. Type a name for the CMS database, or accept the default (`BOE120`).

> **Notes:** The GI2 installation presumes MySQL as the DBMS type. BO, however, accepts other types for this database when the software is deployed apart from GI2.
>
> Starting from Service Pack 5, BO uses SQLAnywhere as default CMS DBMS with default port `2638`.

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

> **Note:** This installation presumes the Tomcat application server as the server that ties your data mart to BO. BO, however, accepts other application servers when BO software is deployed apart from GI2.

20. Type the redirect port for Tomcat, or accept the default (`8443`).
21. Type the shutdown port for Tomcat, or accept the default (`8005`).
22. Type the BO installation type: `1` for user, `2` for system. The system installation type enables the BO servers to start and stop automatically when the UNIX server is brought up or shut down.
23. Type the full path of the destination directory for GI2 installation files. This path cannot contain spaces.

    The installation routine verifies that a valid path was entered, extracts the BO and/or GI2 archives using the destination directories that were specified in Steps 6 and 23, and loads the GI2 reports and universe into the BO repository.

    If the installation routine fails to connect, the installation halts. You will have to resume the installation manually as described on page 72.

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

See "Application Files" on page 107 for a description of the files that are deployed. After successful installation, Genesys recommends that you edit the `gi2_setenv.sh` file to remove the password, if you are concerned about security.

Instructions for BI 4.1

BO software must be preinstalled so that the GI2 universe, folder, and reports can be deployed to the BO repository.

1. In the directory into which you copied the GI2 installation package (or from the Genesys Interactive Insights 8.1 DVD), locate the `install.sh` shell script.
2. Run this script from the command line by typing: `sh install.sh`
3. When prompted to do so, indicate whether to copy only the GI2 installation files: `y` or `n`.

   If you select `y`, the installation routine copies the files that are needed to install GI2 manually to the current directory. You will have to manually deploy the GI2 universe and reports to the BO repository and set up groups and user permissions.

   If you select `y`, proceed to Step 9.
4. When prompted to do so, indicate whether to deploy GI2: `y` or `n`.

   If you selected `n` at Step 3, select `y` at this step.
5. Type the path of the BO installation. This path cannot contain spaces.
6. Specify the host for the BO CMS, or accept the default, which is the name of the local computer.

   The host name you specify cannot contain underscores (_), periods (.), or slashes (/ or \).
7. Type the CMS port, or accept the default (`6400`).
8. Type the password for the BO `Administrator`.
9. Type the full path of the destination directory for GI2 installation files. This path cannot contain spaces.

   The installation routine verifies that a valid path was entered, extracts GI2 archives using the destination directories that were specified, and loads the GI2 reports and universe into the BO repository.

   If the installation routine fails to connect, the installation halts. You will have to resume the installation manually as described on page 72.

See "Application Files" on page 107 for a description of the files that are deployed. After successful installation, Genesys recommends that you edit the `gi2_setenv.sh` file to remove the password, if you are concerned about security.

Installing GI2 on Windows

Instructions for BO XI 3.1

1. From the Genesys Interactive Insights 8.1 CD or image, double-click the `setup.exe` file.

   The installation routine checks the Windows registry for an existing GI2 installation before it displays the `Welcome` page.

2. At the `Welcome` page, click `Next`.

3. At the `Installation Mode` page, choose one of the following options:
   - `Deploy Genesys Interactive Insights`
   - `Copy Genesys Interactive Insights files only`

   Then, click `Next`.

   If you selected only to copy installation files, skip to Step 11.

4. At the `Select Options` page, choose one or more of the following options:
   - Install BusinessObjects Enterprise (BO) XI
   - Install Interactive Insights

   Then, click `Next`.

   Note: The installation routine forces selection of the `Install Business Objects` option, if you select to deploy GI2 and if it detects no such installation on the local host.

   If BO is already installed on your host and you select only to install GI2, skip to Step 6.

   If you selected to copy GI2 files, the installation routine copies the files to the current folder and exits.

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

6. At the `BusinessObjects Enterprise Central Management Server` page, enter the password of the CMS `Administrator`, and click `Next`.

   The installation routine prepopulates default values in the `Host name` and `Port` fields. Change these values, if desired. The host name that you specify cannot contain underscores (_), periods (.), or slashes (/ or \).

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

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

- Auditing Database name (`BOE120_AUDIT`)
- Database Port (`3306`)
- Administrator password
- User name (`sa`)
- User password

Note: Starting from Service Pack 5, BO uses SQLAnywhere as default CMS DBMS with default port `2638`.

8. At the `Business Objects Enterprise Configuration Parameters` page, enter the following server parameters for the BO Intelligence Agent and for Tomcat, or accept the defaults, and click `Next`:
   - SIA `Node name` (default: *name of local host*)—The host name that you specify cannot contain underscores (_), periods (.), or slashes (/ or \). SIA is the Server Intelligence Agent that manages BO services and servers.
   - SIA `Port` (`6410`)
   - Tomcat `HTTP Connection Port` (`8080`)
   - Tomcat `Redirect Port` (`8443`)
   - Tomcat `Shutdown Port` (`8005`)
9. At the `Choose BusinessObjects Enterprise (BOE) XI Location` page, enter the full path for the BO installation, and click `Next`.
10. At the `Choose BusinessObjects Enterprise (BOE) XI Installation Program Location` page, enter the folder where the BO installation files exist, and click `Next`.
11. At the `Choose Destination Location` page, specify where the installation routine is to install the GI2, or accept the default location, and click `Next`. The default location is:

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

    The installation routine extracts the BO and/or GI2 archives by using the destination directories that were specified in Steps 9 and 11; adds keys to the registry; loads the GI2 reports, universe, users, groups, and rights; scans the BO 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 opted to install BO (option `Deploy Genesys Interactive Insights`) at Step 3.
13. Check the `deploy_unv_rep.log` file for indication of a successful GI2 installation. The last line of the file should indicate the scan results of the BO 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 BO 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 "Application Files" on page 107, for a description of the files that are deployed. After successful installation, Genesys recommends that you edit the `gi2_setenv.bat` file to remove the password, if you are concerned about security.

Instructions for BI 4.1

1. From the Genesys Interactive Insights 8.1 CD or image, double-click the `setup.exe` file.

   The installation routine checks the Windows registry for an existing GI2 installation before it displays the `Welcome` page.

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

   Then, click `Next`.

   If you selected only to copy installation files, skip to Step 5.

4. At the `BusinessObjects Enterprise Central Management Server` page, type 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. The host name that you specify cannot contain underscores (_), periods (.), or slashes (/ or \).

5. At the `Choose Destination Location` page, specify where the installation routine is to install GI2, or accept the default location, and click `Next`. The default location is:

   `C:\Program Files (x86)\GCTI\Genesys Interactive Insights`

6. At the `Ready to Install` page, click `Install`.

   The installation routine extracts the GI2 archives from the destination directory that was specified Step 5; adds keys to the registry; loads the GI2 reports, universe, users, groups, and rights; scans the BO repository for existing components; and then exits.

See "Application Files" on page 107, for a description of the files that are deployed. After successful installation, Genesys recommends that you edit the `gi2_setenv.bat` file to remove the password, if you are concerned about security.

Manually Running the GI2 Installation Script

You can use the files that are deployed by the installation routine to import the GI2 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 BO environment.
- Selected the copy-files-only option from the Genesys Installation Wizard.
- Want to reimport the universe, folder, and/or reports into your environment.

  Note: Before re-importation, delete the GI2 universe, folder, connection, user groups, and default users (that is, perform Step 3 on page 104).

- The installation of GI2 was unsuccessful using the Genesys Installation Wizard. If so:

  a. Verify that the prerequisites, which are listed on page 64, are met.

  b. Locate the error:

  - For Release 8.1.0/8.1.1, see the log file (`deploy_unv_rep.log`). This file might indicate where the installation routine halted.
  - For Release 8.1.3/8.1.4, check for errors using the Central Management Console (`Promotion Management -> Promotions Jobs -> 8.1.3` (or `8.1.4`).

  c. Correct the error.

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

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

- To deploy the GI2 universe, reports, users, user groups, and permissions, run the `gi2_deploy_unv_rep.bat` batch script.
- To scan the BO repository in order to confirm that its contents match those of the `insights.biar` file, run `gi2_deploy_sum.bat`. (GI2 8.1.0–8.1.1 only)

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

When finished, check the log file (`deploy_unv_rep.log`) for errors. (This log file is not produced for GI2 8.1.3 or 8.1.4 releases.) After successful installation, Genesys recommends that you edit the `gi2_setenv.bat` file to remove the password, if you are concerned about security.

Manually Importing Objects and Data Elements

The GI2 universe holds the needed business objects and data elements for running the GI2 reports. These data elements include classes, dimensions, measures, and conditions, as well as the reports themselves. Please refer to the *Genesys Interactive Insights 8.1 Universe Guide* for descriptions of universe elements.

The installation routine automatically imports the GI2 universe, folders, reports, users, groups, and rights into your BO 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 GI2 users.

Operating the Import Wizard

This section describes how to manually import the GI2 universe, folders, reports, users, groups, and rights into BO XI 3.1 using the Import Wizard, which is part of the BO XI 3.1 suite for Microsoft Windows platforms.

If you have BI 4.1, perform these steps using the Promotion Management tool, available through the Central Management Console (CMC), which is described in BO documentation. Also, in BI 4.1, you can optionally migrate your universe from UNV to UNX using the steps described in "Migrating Custom Universe and Reports (for 8.1.3 and later)" on page 93.

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 GI2 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. For the 8.1.0 and 8.1.1 releases, at the `Select objects to import` page that is shown in Figure 26, select, at minimum, the following objects to import, and click `Next`:
   - `Import users and users groups`, with the following subcategories checked:
     - `Import application rights`
     - `Import root folder rights`
   - `Import folders and objects`
   - `Import universes`
   - `Import custom access levels`

Note: For 8.1.3/8.1.4, you must use the Promotion Management tool, available through the Central Management Console (CMC), to import the `insights.lcmbiar` file. Refer to BO documentation for information on how to use this tool.

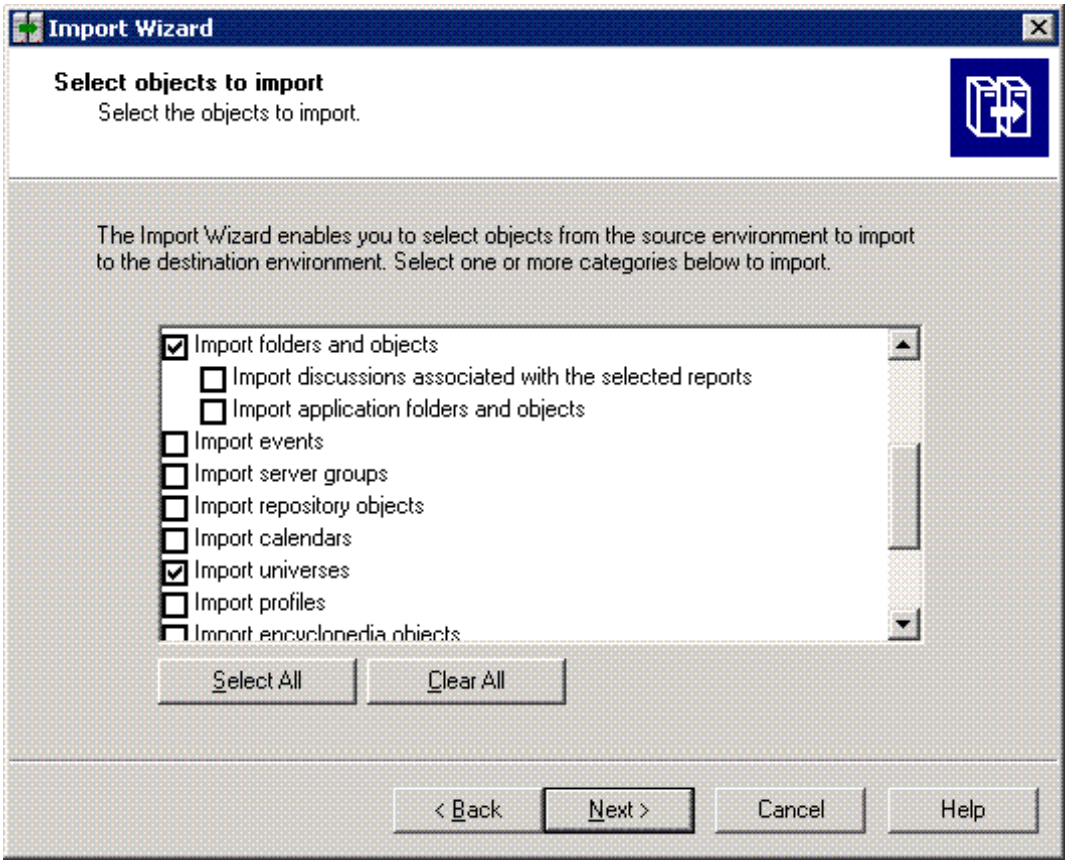


Figure 26: Cutaway of the Select Objects to Import Page of the Import Wizard

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 the import of GI2 elements. The following steps pertain to the minimum selections that are required to import GI2.

7. At the Import scenario page, select the following, and click Next:

   Update the destination object. In case of name conflict, rename it

8. At the Incremental import page, determine which objects and object rights should be overwritten, and click Next. Selections on this page are meaningless if you are importing the universe for the first time or if you are importing the universe to a new environment.
9. At the Users and groups page, select to import all groups and users, and click Next.
10. At the Custom Access Levels page, select to import all access levels, and click Next.
11. At the Folders and objects page, select the Interactive Insights root folder, and click Next. If you do not want to import all of the GI2 reports or documentation, open this folder and the appropriate release subfolder, and clear one or more of the following boxes:
    - Agents
    - Business Results
    - Details
    - Documentation
    - Outbound Contact
    - Queues
12. At the Select application folders and objects page, click Next.
13. At the Import options for universes and connections page, select the following option, and click Next:

    Import all universes and all connection objects

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

14. At the Import options for publications page, select the following option, and click Next:

    Do not import recipients

15. At the A note on importing reports page, click Next.
16. On the Ready to import page, the Import Wizard summarizes the objects that it will import according to your selections. Click Back to change any of your selections, or click Finish to start the import operation.
17. When the import completes, click Done.

Universe Contents

If you have imported the GI2 universe successfully, your BO environment will contain the following:

- Depending on your 8.1 release, either three, four, or five groups:
  - `Interactive Insights report developers`, `Interactive Insights report editors`, and `Interactive Insights report viewers` (for the GI2 8.0–8.1.1 releases)
  - `Interactive Insights report basic` (GI2 8.1.102 and later), and `Interactive Insights access restrictions` (GI2 8.1.4 and later, and 8.1.1 releases beginning with 8.1.104)
- Depending on your 8.1 release, three or four users—`Developer`, `Editor`, `Viewer`, `Basic` (GI2 8.1.3 and later).
- Ten folders:
  - `Interactive Insights` and a numbered release folder, in both InfoView/LaunchPad and CMC, and the following subfolders:
    - `Agents`
    - `Business Results`
    - `Details`
    - `Documentation`
    - `Outbound Contact`
    - `Queues`
- Depending on your 8.1 release, either three or four custom access levels:
  - `Interactive Insights report developer access level`
  - `Interactive Insights report editor access level`
  - `Interactive Insights report viewer access level`
  - `Interactive Insights report basic access level` (8.1.102 and later)
- Two default access restrictions:
  - Static Access Restrictions
  - Dynamic Access Restrictions
- Fifty-five objects:
  - Forty-one reports in the `Agents`, `Business Results`, `Details`, `Outbound Contact`, and `Queues` folders
  - One PDF document: the *Genesys Interactive Insights 8.1 Universe Guide.* (The *Genesys Interactive Insights 8.1 User's Guide* is now available on the Genesys documentation website at the following URL: `http://docs.genesys.com/Documentation/GI2/8.1.4/UG/`)
  - Ten measure maps (that illustrate the relationships among measures)
  - One universe—`GI2_Universe`
  - One connection—`GI2_GIM_DB`

  Refer to the *Genesys Interactive Insights 8.1 Universe Guide* for a complete listing and descriptions of these reports.

The connection object is irrelevant to your environment, and you can safely ignore it. You can invoke the BusinessObjects Central Management Console to verify that these elements have been deployed (under `Connections`, `Folders`,

`Access Levels`, and `Universes`, and `Users and Groups`). The BIAR file also contains objects (such as measures, dimensions, and filters) which are imported using the Import Wizard, but the deployment of these elements is not reported on the wizard's summary page. The section below, "Viewing the GI2 Reports and Universe", describes yet another way to verify the import.

Refer to BO *Using the Import Wizard* help file for more information about how to operate this utility. Refer to the "Promotion Management" chapter in the relevant *Business Intelligence Platform Administrator Guide* for information on how to use Promotion Management.

Viewing the GI2 Reports and Universe

When you have successfully installed GI2, you can view the GI2 universe in Universe Designer and the GI2 reports in InfoView to confirm that all you selected during installation is 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 3 beginning on page 29.

Viewing the Universe

Figure 27 shows a cutaway of the GI2 universe in Universe Designer. (In BO Business Intelligence Platform, this tool is called the Information Design Tool.)

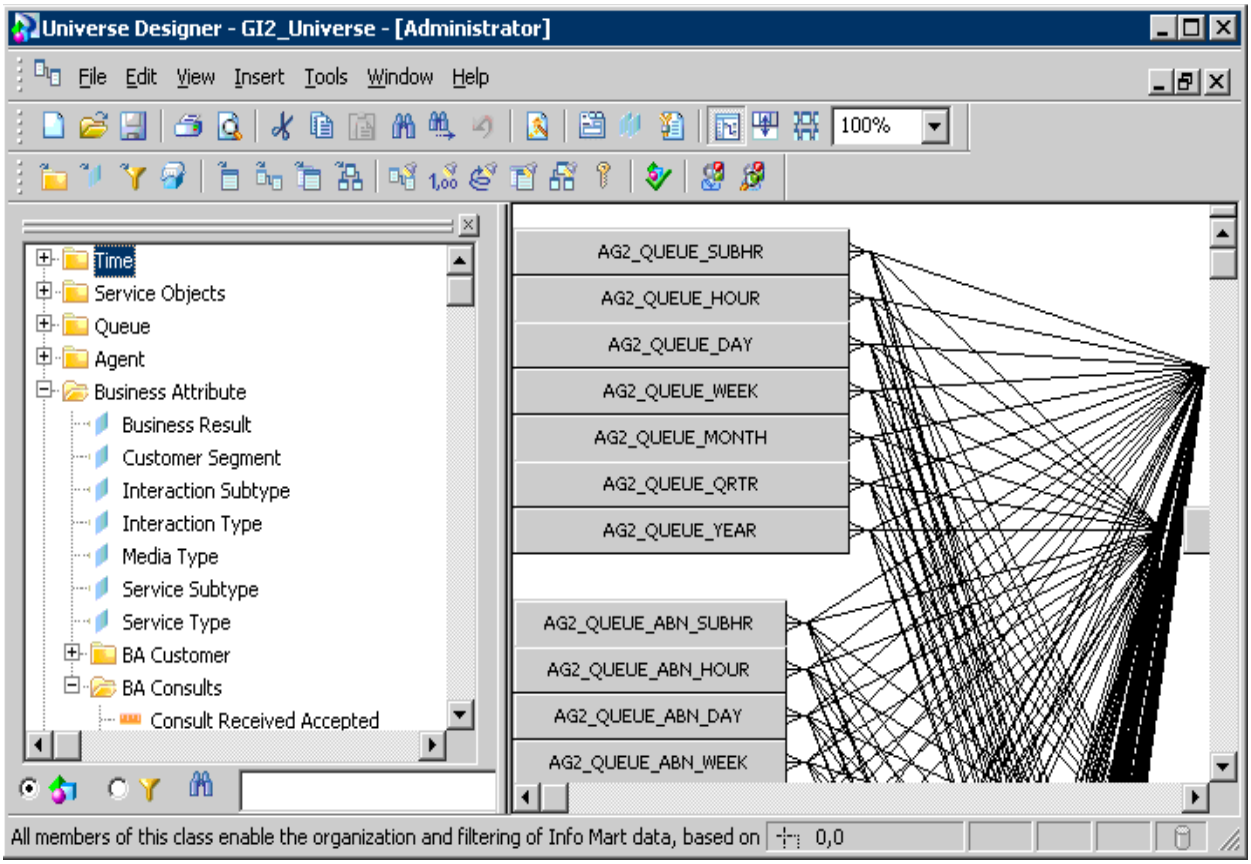


Figure 27: The GI2 Universe in Universe Designer (BO XI 3.1)

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

Viewing the GI2 Reports

Figure 28 shows the Interactive Insights root folder, its subfolders, and some of the queue-based GI2 reports in InfoView when expanded. The `Documentation` folder contains the *Genesys Interactive Insights 8.1 Universe Guide,* the *Genesys Interactive Insights 8.1 User's Guide,* and several maps that illustrate relationships between measures. If you manually imported the universe, the objects provided within the report subfolders will be dependent on the selections you made (Step 11 on page 75) during importation; otherwise, if the installation routine imported the universe and reports, all of the reports will be imported to the repository.

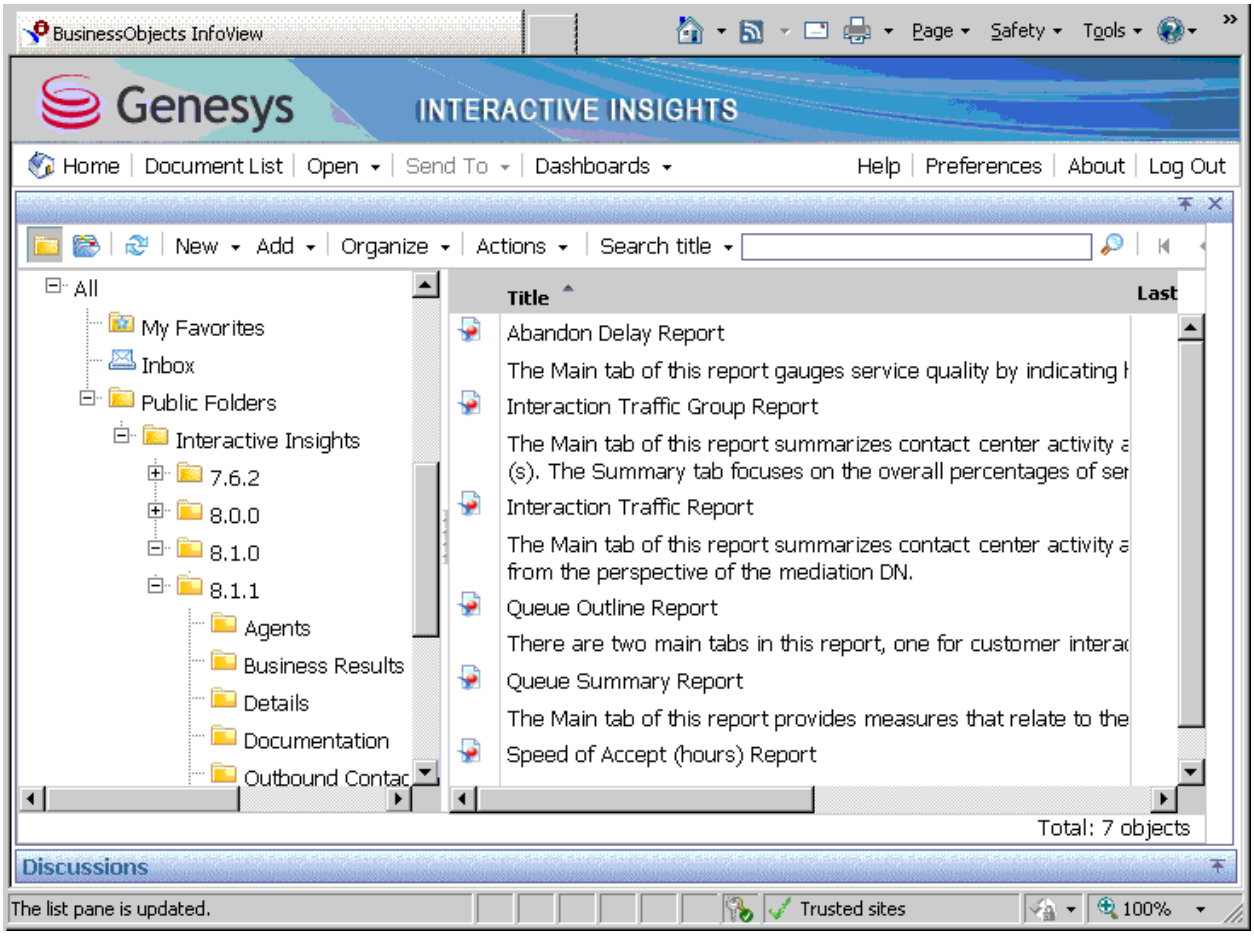


Figure 28: The GI2 Reports in InfoView

You can access GI2 reports using InfoView and Web Intelligence (BO XI 3.1 deployments) or BI Launch Pad (BI 4.1 deployments). Refer to BO documentation for information about how to use these tools.

Note: A release-specific subfolder of the Interactive Insights root folder houses the report and documentation subfolders. For the initial 7.6.2 release, for example, this folder is aptly named `7.6.2`. This folder structure enables you to maintain the customizations that you may have applied to previous GI2 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 GI2.

GI2 Versioning

Both the GI2 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 GI2 version of a report and which version of the universe you

have, in the event that you initiate requests to Genesys Customer Care or have correspondence with other Genesys departments. This versioning might be further useful to your universe and report designers in distinguishing reports from other GI2 releases, especially because the 7.6.2 release enables their co-existence.

Determining the Version of the Universe

The GI2 universe defines the `GI2_UNIVERSE_VERSION` parameter to identify the version of the universe. This version-number parameter, which is shown in Figure 29 on page 80, is accessed within Universe Designer from the `File > Parameters` menu. Genesys recommends that you not change its value.

Note: The version number that is shown in the figure might not match your version of the GI2 universe.

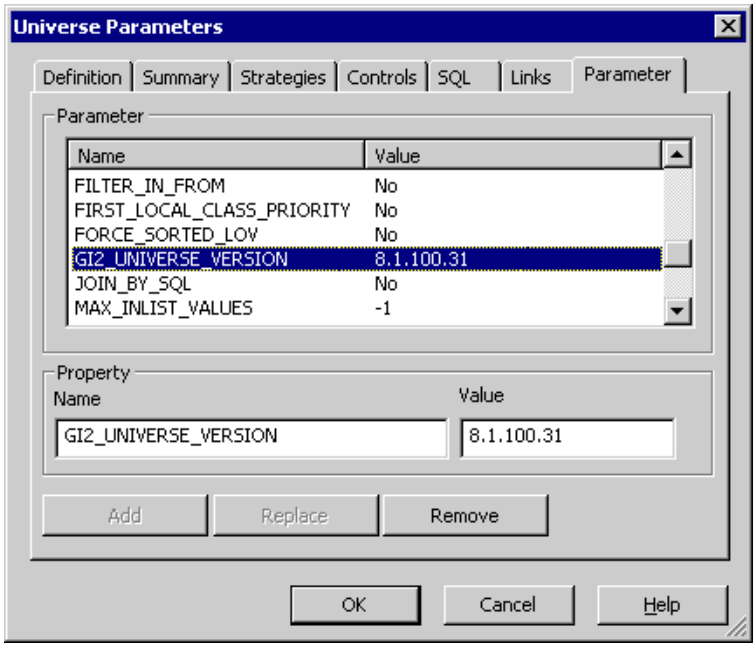
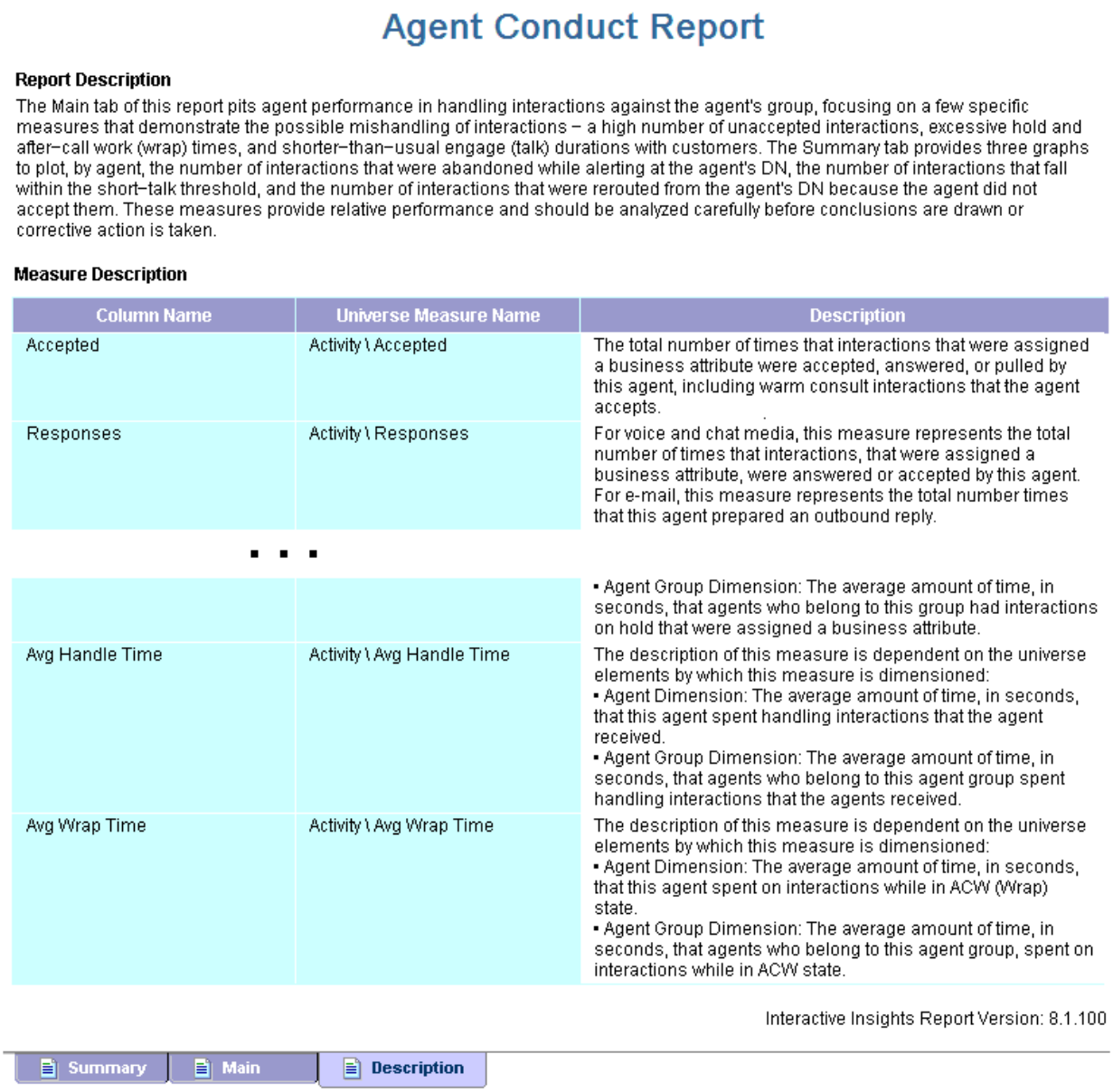


Figure 29: Universe Parameters

Determining the Version of a Report

Stored on the `Description` tab of each GI2 report is a text string that represents the GI2 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 30 on page 81). Genesys recommends that you not change its value.



Agent Conduct Report

Report Description

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

Measure Description

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

Interactive Insights Report Version: 8.1.100

Summary Main Description

Figure 30: Report Version Is Visible on the Description Tab of the Report

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

Chapter

5 Accessing Genesys Interactive Insights Components

You can access Genesys Interactive Insights (GI2) reports using InfoView and Web Intelligence (BO XI 3.1 deployments) or Business Intelligence (BI) Launch Pad (BI 4.1 deployments). You access the GI2 Universe through Designer (BO XI 3.1 deployments) or the Information Design Tool (BI 4.1 deployments). The same is true for localized versions of the GI2 universe and reports; however, you must first import localized GI2 elements using Translation Manager. (This procedure is described in the section beginning on page 59.) This chapter describes how to access each of these applications:

Refer to the BusinessObjects 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 31, for example, shows a downed Tomcat server. Right-click the name of the server to restart it.

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

`Programs > BusinessObjects XI 3.1 > BusinessObjects Enterprise`

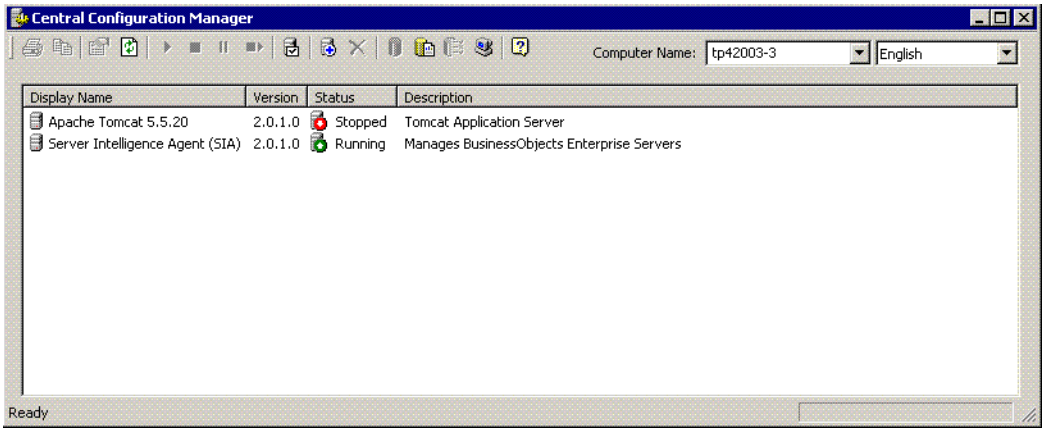


Figure 31: Checking Web Server Status using Central Configuration Manager

Accessing the Central Management Console

BusinessObjects 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:

BO XI 3.1: `http://webserver:8080/CmcApp/logon.faces`

BI 4.1: `http://webserver:8080/BOE/CMC`

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

Accessing InfoView/BI LaunchPad

Within the SAP BusinessObjects Enterprise XI 3.1 suite, the user interface for accessing, managing, and running the GI2 reports is called InfoView. In SAP BusinessObjects Business Intelligence Platform (BI) 4.1, this application is called the BI Launch Pad.

Both InfoView and BI Launch Pad are supported for use in several browsers, including Microsoft Internet Explorer and Firefox. You must have 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 must have user credentials.

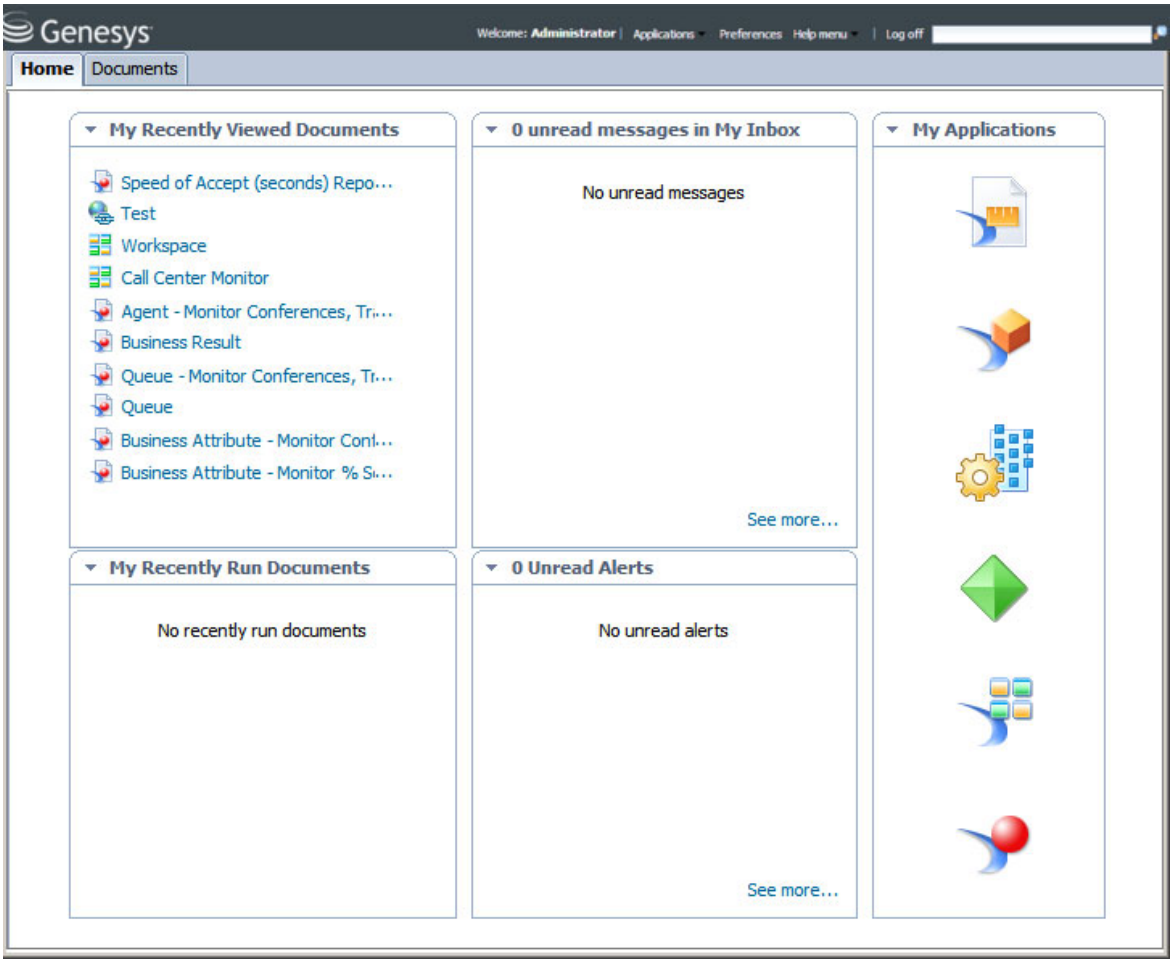
The default paths are:

BO XI 3.1: `http://webserver:8080/InfoViewApp/logon.jsp`

BI 4.1: `http://webserver:8080/BOE/BI`

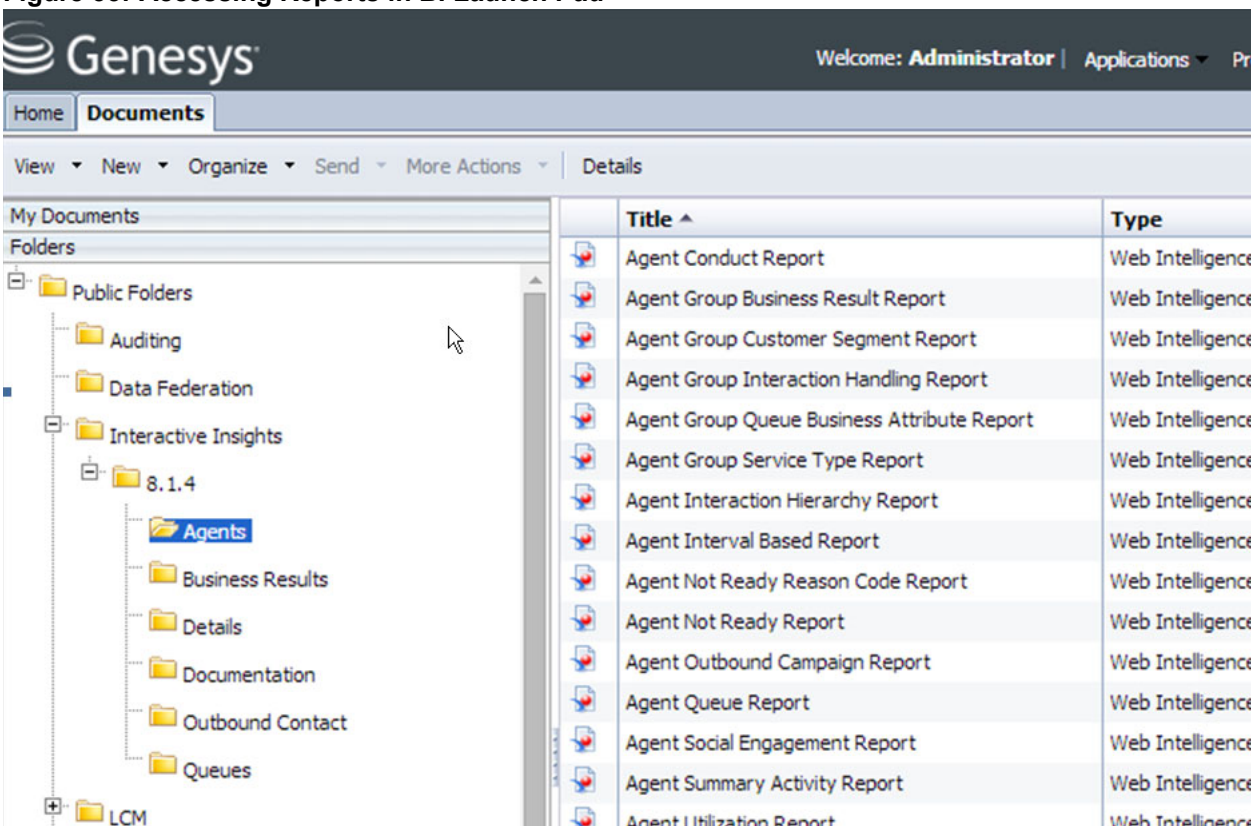
Figure 32 shows the initial login screen of the BI Launch Pad.

Figure 32: BI Launch Pad



In BI Launch Pad, you can access reports by expanding `Documents` > `Folders` > `Public Folders` > `Interactive Insights`, and then choosing the installed release, as shown in Figure 33.

Figure 33: Accessing Reports in BI Launch Pad



For additional information, see the "Getting Started" chapter in the *SAP BusinessObjects Enterprise XI 3.1 InfoView User's Guide* or "BI Content Administration" in the *Business Intelligence Platform User Guide*.

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 *Building Reports with the SAP BusinessObjects Web Intelligence HTML Report Panel* or the *Building Reports with SAP BusinessObjects Web Intelligence Rich Client* for additional information.

Accessing Designer/ Information Design Tool

Within the BO XI 3.1 suite, the user interface for viewing the definitions of universe elements, customizing measures, and creating and assigning Info Mart connections for report users is called Designer. In BI 4.1, this application is called the Information Design Tool.

To open these this tool on Windows platforms, from the `Start` menu, select `Designer` or `Information Design Tool` in the program folder from which BusinessObjects was deployed. The default location of this folder is the following:

BO XI 3.1: `Programs > BusinessObjects XI 3.1 > BusinessObjects Enterprise`

BI 4.1: `Programs > SAP Business Intelligence > SAP BusinessObjects BI platform 4 Client Tools`

Refer to the "Doing Basic Operations" chapter in the *SAP BusinessObjects XI 3.1 Universe Designer* or the *Information Design Tool User Guide* for information on how to use these applications.

Accessing Translation Manager

Use Translation Manager to manage the localization of universes and their Web Intelligence documents and prompts. You open Translation Manager on Windows platforms. From the `Start` menu, select `Translation Manager` or `Translation Management Tool` in the program folder in which BusinessObjects was deployed. The default location of this folder is:

BO XI 3.1: `Programs > BusinessObjects XI 3.1 > BusinessObjects Enterprise`

BI 4.1: `Programs > SAP Business Intelligence > SAP BusinessObjects BI platform 4 Client Tools`

Refer to the *Translation Manager Guide* for information on how to use this application. (Access this document by clicking `F1` within the utility.)

Chapter

6 Migrating Genesys Interactive Insights

In the 8.1.0 and 8.1.1 releases, the scope of migrating Genesys Interactive Insights (GI2) includes migration of custom reports that were created in a prior GI2 release and migration of the 7.6 aggregate tables to 8.1. The tool for the latter is described in the *Genesys Migration Guide*.

This release does not support migration to release 8.1.3 or 8.1.4, or the migration or upgrade of the GI2 universe itself—to use the latest universe, you must install it anew. As with all 7.6.2 and higher releases, the latest release also supports the co-existence of different releases of universes and reports within the same BusinessObjects (BO) repository.

You do not need to uninstall or reinstall BO software. Nor must you uninstall the prior instance of GI2. Migrated reports must employ the supported measures or their supported alternate definitions and these measures must still be supported within the current release.

This chapter includes the following sections:

Interoperability of Software Components

GI2 comprises many components; all of them should be in sync, for optimal report operation. Table 3 on page 90 shows the mix of the minimum required versions of each software component for complete functionality of all of the reports that were offered since the initial GI2 7.6 release.

Table 3: Software Versions of GI2 Components

GI2 Release	BO Release	Genesys Info Mart Release (Schema)	RAA Release
7.6.0	3.0 (12.0)	7.6.001.07 (7.6.000.09)	N/A
7.6.001	3.0 + Hot Fix (12.0)	7.6.001.07 (7.6.000.09)	N/A
7.6.1	3.1 (12.1.0.882)	7.6.003.05 (7.6.000.09)	N/A
7.6.2	3.1 (12.1.0.882) Fix Pack (FP) 1.8	7.6.005.11 (7.6.005.00)	N/A
8.0.000.32	3.1 (12.3.0.601) Service Pack (SP) 3	8.0.000.73 (8.0.000.72)	8.0.000.32
8.0.001.03	3.1 (12.3.0.601) SP3	8.0.001.05 (8.0.001.02)	8.0.001.03
8.0.001.06	3.1 (12.3.0.601) SP3	8.0.001.05 (8.0.001.04)	8.0.001.06
8.0.100.05	3.1 (12.3.0.601) SP3	8.0.100.05 (8.0.100.02)	8.0.100.05
8.1.000.12	3.1 (12.3.0.601) SP3	8.1.000.25 (8.1.000.01)	8.1.000.12
8.1.001.02	3.1 (12.3.0.601) SP3	8.1.000.25 (8.1.000.01)	8.1.001.02
8.1.100.19	3.1 (12.5.0.1190) SP5	8.1.101.05 (8.1.101.05)	8.1.100.19
8.1.100.30	3.1 (12.5.0.1190) SP5	8.1.102.02 (8.1.102.01)	8.1.100.30
8.1.100.31	3.1 (12.5.0.1190) SP5	8.1.103.03 (8.1.103.01)	8.1.100.31
8.1.101.05	3.1 (12.5.0.1190) SP5	8.1.103.03 (8.1.103.01)	8.1.100.31
8.1.102.02	3.1 (12.6.0.1596) SP6	8.1.103.03 (8.1.103.01)	8.1.100.31
8.1.103.03	3.1 (12.6.0.1596) SP6	8.1.103.03 (8.1.103.01)	8.1.100.31
8.1.104.01	3.1 (12.7.0.1983) SP7	8.1.103.03 (8.1.103.01)	8.1.104.01
8.1.300.03	Platform 4.1 (14.1.2.1121) SP2	8.1.103.03 (8.1.103.01)	8.1.103.01
8.1.400.17	Platform 4.1 (14.1.2.1121) SP2	8.1.400.14 (8.1.400.14)	8.1.400.27

Summary of GI2_Universe Changes

Some universe additions were made for the 8.1.*x* releases to support new columns in a few of the existing and the new Interaction Volume Service Type Trend report. The `Queue` and `Business Attribute` classes were reorganized to add several consult measures and to separate them from nonconsult measures in different subclasses. Queue-type details were added to queue dimensions to identify the type of queue that performed the processing. Warm consult measures were added to the `Activity` class. The `Ready` measure was added to the `Summarized State` class. Revenue and Satisfaction measures were added to the `Agent Contact` and `Handling Attempt` classes. New threshold measures were added; former threshold measures were renamed with an "`_80`" suffix. Threaded and unique measures were added. Several call-progress detection measures were added to the `Contact Attempt` class. Refer to the *Genesys Interactive Insights 8.1 Universe Guide* for a complete listing and definitions of all measures.

Given that the universe is continuously evolving, the custom reports that you create by using one release of GI2 might yield different results if you run these reports with a different release of the GI2 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 BO Folders

Beginning with release 7.6.2, GI2 supports the co-existence of multiple releases of the GI2 universes and reports within the BO repository. Both are stored in release-specific subfolders of the Interactive Insights root folder. Prior to 7.6.2, the GI2 universe was stored in the `Universes` root folder of the BO repository and the reports were stored in the Interactive Insights root folder. If you are not installing GI2 for the first time and you want to maintain more than the current GI2 universe and reports, then, for better organization, Genesys recommends that you restructure Central Management Console (CMC) folders to relocate prior 7.6 universes and reports into release-specific subfolders.

Reorganizing Report Folders

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

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

Note: The aforementioned name is only a suggestion.

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

Figure 34 shows one suggestion for the reorganization of report folders.

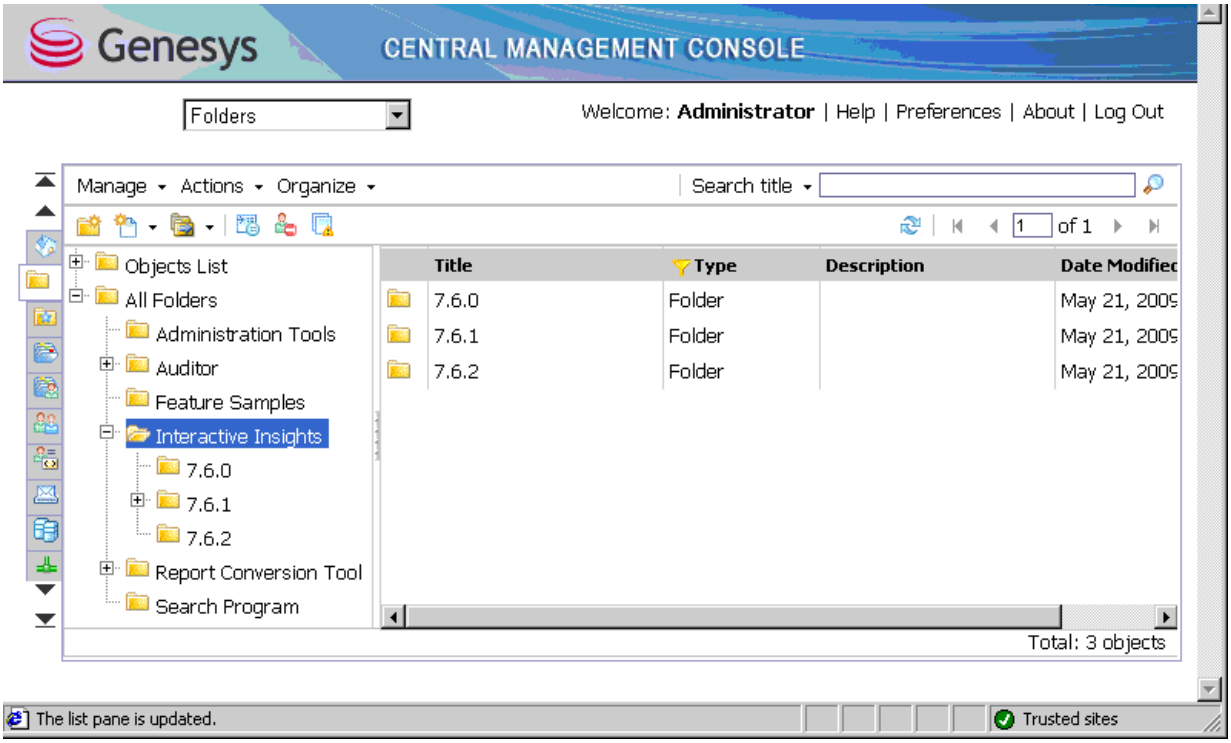


Figure 34: Reorganizing Report Folders into Release-Specific Subfolders

Reorganizing Universe Folders

To reorganize the universe folders for the 7.6.1 release:

1. Open CMC, and select `Universes`.
2. Navigate to the Interactive Insights folder, and create a new subfolder (that is named, for example, `7.6.1`).
3. Select `GI2_Universe` at the root level and relocate it under the `7.6.1` folder:
   a. Right-click the universe, and then select `Organize > Move To`.
   b. Navigate to the `7.6.1` folder, move it to the `Destinations` box, and click `Move`.

4. Back up your changes by exporting the repository—for example, to a BIAR file.

Figure 35 shows one suggestion for the reorganization of universe folders.

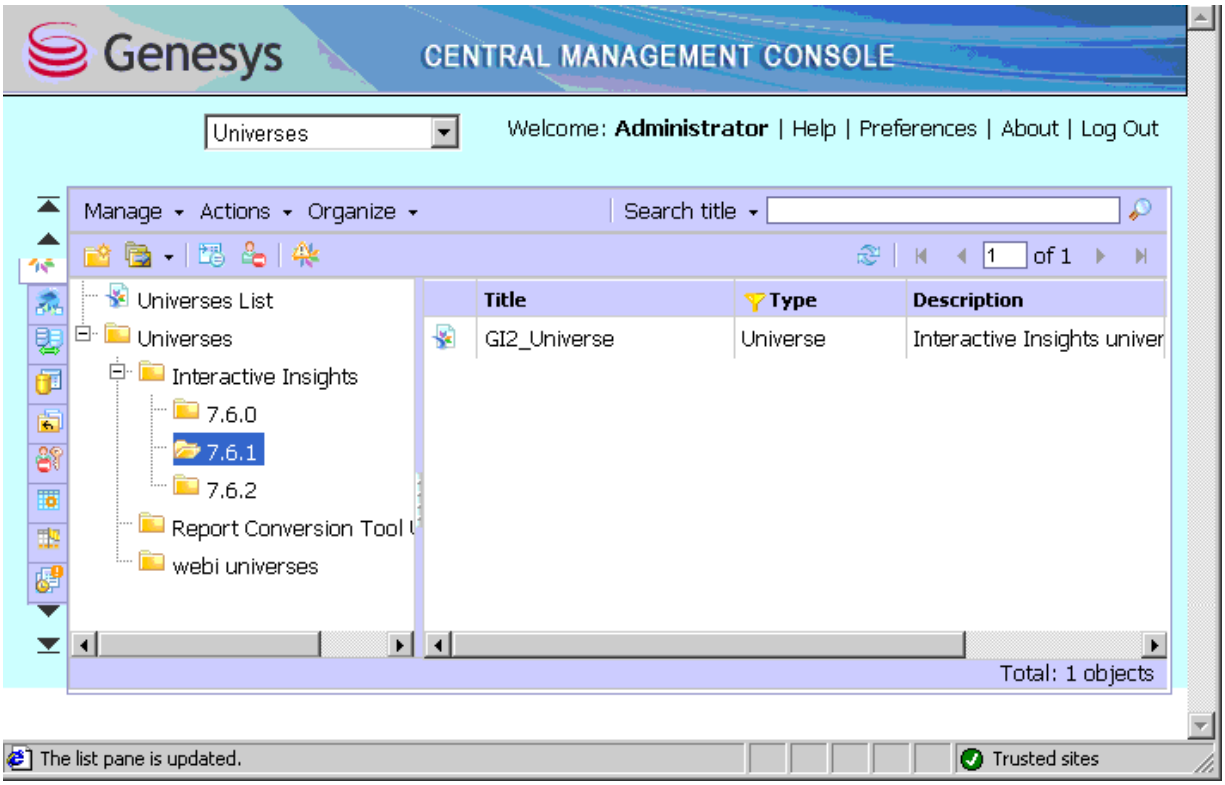


Figure 35: Reorganizing Universe Folders into Release-Specific Subfolders

Migrating Custom Universe and Reports (for 8.1.3 and later)

GI2 release 8.1.3 introduced SAP BusinessObjects Business Intelligence Platform (BI) 4.1. In release 8.1.3 or 8.1.4 deployments, you can optionally migrate the UNV universe and reports (BO XI 3.1 universe format) to the UNX universe (BI 4.1 universe format). Use the information in this section to migrate the universe and reports, or to make necessary configuration changes if you do not migrate the universe and reports:

- "Migrating Your BO XI 3.1 Deployment to BI 4.1"
- "Migrating Your BO XI 3.1 Deployment to BI 4.1 Without Converting the Universe from UNV to UNX" on page 96

Migrating Your BO XI 3.1 Deployment to BI 4.1

Use the information in this section to migrate your custom universe and reports from BO XI 3.1 (UNV Universe) to BI 4.1 platform (UNX Universe).

Before you begin, ensure that the following servers on the source and destination deployments are shut down, to avoid inconsistent states in your new BI 4.1 deployment:

- All of the servers in the source deployment, except the Central Management Server (CMS) and the File Repository Server (FRS).
- All of the servers (including all of the Job Servers) in the destination deployment, except the CMS, FRS, and the Report Application Server (if you plan to upgrade Crystal Reports documents).

To migrate your SAP BusinessObjects Enterprise deployment, perform the following steps:

1. Launch the Upgrade management tool: `Start > Programs > SAP Business Intelligence > SAP BusinessObjects BI platform 4 > Upgrade management tool`.

   Follow the steps that appear in the Upgrade management tool, which guides you through the process of exporting BI content (user accounts, groups, folders, reports, universes, security, and other objects) and upgrading BI.

   For more information about the upgrade process, see the *SAP BusinessObjects Enterprise Upgrade Guide*.

2. Check the UNV universe for cases where a class and dimension (measure) have the same name (for example, in the GI2 Universe, there is both a class and a dimension named `Queue`). Open the UNV universe using the Universe Design tool, and rename each dimension that has such a naming conflict. For example, in the case of the `"Queue"` dimension, change the name to `"Queue-"`.

   Note that, if you attempt to convert the universe with a class and dimension (measure) having the same name, the following error appears during the conversion of UNV to UNX: `Error converting universe. Ambiguous object path for 'Queue\Queue'...`

3. After the Upgrade management tool exports the content from BO XI 3.1 to BI 4.1, use the Information Design Tool to convert the custom universe from UNV to UNX format manually. Run the convert procedure with the `prompt convert` option.

4. For each dimension that you renamed in Step 2, restore the original names (for example, rename the dimension `"Queue-"` to `"Queue"`). Save and publish the UNX universe to the server.

5. Perform the following steps to update the UNX universe (`GI2_Universe` standard objects are shown as examples):
   a. Update all conditions to use the new `@Prompt()` function syntax, except `…TimeRange` conditions from the `Detail` class.

      The `@Prompt` function has a new alternative syntax to take advantage of named parameters. For conditions that use the `@Variable()` function, replace the `@Variable()` function with the `@Prompt() function`.

      For example, change `@Variable("Agent Group:")` to `"@Prompt(Agent Group")`. For more information, see the related topic in the *Information Design Tool User Guide*.

   b. Update all `…TimeRange` conditions from the `Detail` class to use the new format of the default values and new data type in `@Prompt()` function. For example:

      ```
      @Prompt('Start Time:','DT',,Mono,Free,Persistent,{'Mar 1, 2013 12:00:00 AM'},User:2)
      ```

   c. If the custom universe uses `REPLACE_COMMA_BY_CONCAT` parameter, you must update the SQL definitions for objects that use the "," sign as a concatenation operand. Use the standard BO function `{fn concat()}` instead of the comma. For example:

      ```
      {fn concat({fn concat(@Select(Outbound Contact\Contact Attempt\Campaign),'@')},@Select(Outbound Contact\Contact Attempt\Campaign Group\Group Name))}
      ```

      Update the following GI2 universe objects:

      — `Agent\Activity\State` and `Reason\Reason Code` (in versions older than 8.1.103.03)

      — `Detail\Agent Detail\State\Reason Code` (in versions older than 8.1.103.03)

      — `Detail\Agent Detail\Ixn State\State` (in versions older than 8.1.103.03)

      — `Outbound Contact\Contact Attempt\Campaign Group`

      — `Outbound Contact\Agent Contact\Campaign Group\Group Name`

6. To reassign Web Intelligence documents to the new UNX universe, open the Change Source dialog box, check mapping for all objects, and remap any that are not correct.

7. If you have Web Intelligence documents that use merged dimensions in a section, table, or in the other report elements, recreate the merged dimensions and assign them in appropriate report elements.

8. For any parameterized URLs that have the OpenDocument syntax, update them to use the new syntax. This is important if those URLs are used in Web Intelligence documents.

   Parameter references, including syntax and usage examples, are provided for each OpenDocument URL parameter in the *Viewing Documents Using OpenDocument* SAP Product Guide.

Format the URLs as follows:

```
="<a href=\"../../../../../OpenDocument/opendoc/
openDocument.jsp?...
```

Note that the `sWindow` parameter is obsolete in BO XI 3.1 and later. Instead, use the HTML anchor's target attribute or an equivalent. For example: `<a href="..." target="_blank">...</a>`

9. Verify Custom Access Levels by editing the migrated Custom Access Levels in the CMC. Check the `Name` column for levels that have `Unknown Rights` instead of the description that was given in BO XI 3.1 (for example, `Interactive Insights report basic/viewer/editor/developer` access level).

   This right change occurs because InfoView is no longer available, and BI Launchpad does not offer the same rights that are available in the application area of the CMC. Some of the Web Intelligence viewers and functionality have changed, and the related rights do not exist or are no longer relevant.

   You can achieve the same level of restrictions that these Custom Access Levels had in BO XI 3.1 by combining existing rights available in the CMC. For more information, see the SAP white paper *How Security Rights are migrated between 3.x and 4.0.3.*

Migrating Your BO XI 3.1 Deployment to BI 4.1 Without Converting the Universe from UNV to UNX

Use the information in this section to migrate your custom universe and reports from BO XI 3.1 to BI 4.1 platform, without converting your Universe from UNV to UNX.

Before you begin, ensure that the following servers on the source and destination deployments are shut down, to avoid inconsistent states in your new BI 4.1 deployment:

- All of the servers in the source deployment, except the CMS and the FRS.
- All of the servers (including all of the Job Servers) in the destination deployment, except the CMS, FRS, and the Report Application Server (if you plan to upgrade Crystal Reports documents).

To migrate your SAP BusinessObjects Enterprise deployment, perform the following steps:

1. Launch the Upgrade management tool: `Start > Programs > SAP Business Intelligence > SAP BusinessObjects BI platform 4 > Upgrade management tool`.

   Follow the steps that appear in the Upgrade management tool, which guides you through the process of exporting BI content (user accounts, groups, folders, reports, universes, security, and other objects) and upgrading BI.

For more information about the upgrade process, see the *SAP BusinessObjects Enterprise Upgrade Guide*.

2. For any parameterized URLs that have the OpenDocument syntax, update them to use the new syntax. This is important if those URLs are used in Web Intelligence documents.

   Parameter references, including syntax and usage examples, are provided for each OpenDocument URL parameter in the *Viewing Documents Using OpenDocument* SAP Product Guide.

   Format the URLs as follows:

   ```
   ="<a href=\"../../../../../OpenDocument/opendoc/
   openDocument.jsp?...
   ```

   Note that the `sWindow` parameter is obsolete in BO XI 3.1 and later. Instead, use the HTML anchor's target attribute or an equivalent. For example: `<a href="..." target="_blank">...</a>`

3. Check reports for cases where drilling up from an original dimension to the next aggregation level causes report sections to be populated by the text `#MULTIVALUE`, instead of by the expected data. This occurs because the layout of some reports define section breaks that are appropriate only to the original aggregation level (dimension) designed for the report. These section breaks do not accommodate drilling operations.

   For example, the Agent Interval Based Report has a section break on `Agent Name`. As a result, drilling up to `Agent Group` does not redefine the section break to occur on agent groups, and reports for drilled aggregation levels display the result `#MULTIVALUE`.

   To prevent this, disable drill up/down operations from the section dimension of the report. For example, to disable drilling for Agent Interval Based Report:

   a. Open the report in design mode.

   b. Change the following formulas in the `Agent Name` section:

From	To
`=NameOf([Session Query].[Agent Name])`	`=NameOf([Session Query].[Agent Name])+""`
`=[Agent Name]`	`=[Agent Name]+""`

4. The GI2 reports Abandon Delay Report and Speed of Accept (hours/seconds) Report have incorrect legend colors, and graphical elements are incorrectly positioned on the chart.

   To prevent this, make the following changes:

   a. Assign `TimeRangeKey` dimension to the `Category Axis`.

   b. In the `Category Axis`, under `Layout`, turn off `Show Labels`.

   c. In the `Category Axis`, change the `Custom Title` value to:
   `(=" ST 1 ST 2 ST 3 ST 4 ST 5 ST 6 ST 7 ST 8 ST 9 ST 10")`

5. Verify Custom Access Levels by editing the migrated Custom Access Levels in the CMC. Check the `Name` column for levels that have `Unknown Rights` instead of the description that was given in BO XI 3.1 (for example, `Interactive Insights report basic/viewer/editor/developer` access level).

   This right change occurs because InfoView is no longer available, and BI Launchpad does not offer the same rights that are available in the application area of the CMC. Some of the Web Intelligence viewers and functionality have changed, and the related rights do not exist or are no longer relevant.

   You can achieve the same level of restrictions that these Custom Access Levels had in BO XI 3.1 by combining existing rights available in the CMC. For more information, see the SAP white paper *How Security Rights are migrated between 3.x and 4.0.3.*

After Migration from BO XI 3.1 to BI 4.1

For any issues you encounter after migration, see the Known Issues and Recommendations section in the *Genesys Interactive Insights 8.1.x Release Note.*

Linking the Most Recent Universe to Custom Reports (for 8.1.1)

The procedure for migrating custom reports that were designed by using a prior release of GI2 to the 8.*x* release consists of two-steps:

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

Running the upgrade utility accomplishes the first step. This utility is described in the chapter of the *Genesys Interactive Insights 8.1 User's Guide* that describes upgrading GI2 Reports. The second step requires that you manually link the associated universe for each report to point to the new universe. This is accomplished within Web Intelligence and is described in the following procedure.

1. Open your custom report in Edit mode.
2. Click `Edit Query`, and then select the `Properties` tab, as shown in Figure 36:

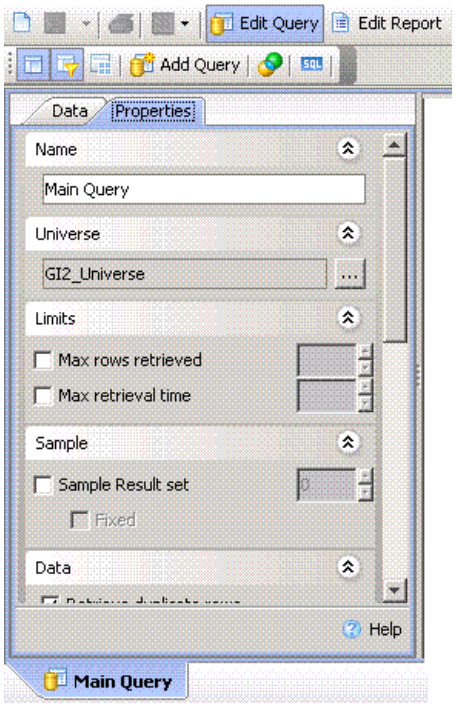


Figure 36: Properties Tab of a Report's Main Query

3. To the right of the universe name, click the three dots to open the `Universe` dialog box, which is shown in Figure 37.

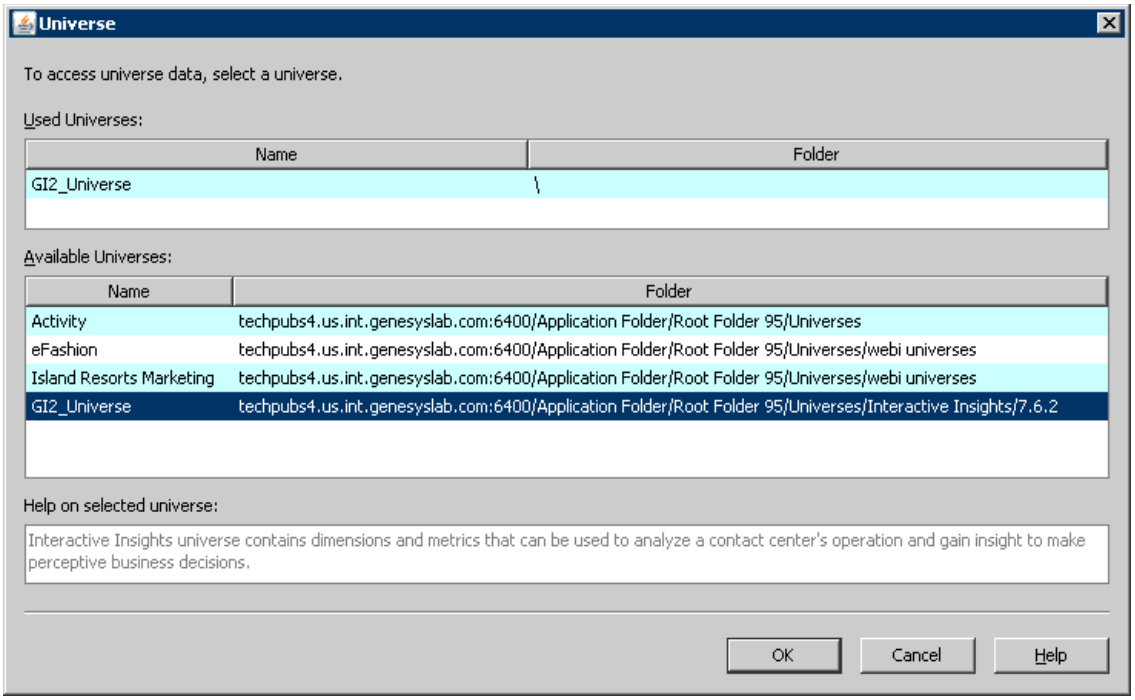


Figure 37: Universe Dialog Box

> **Note:** Each release of GI2 names the GI2 universe identically: `GI2_Universe`. You can distinguish the universe of one release from another by the folder in which it is stored or by its version number (see "Determining the Version of the Universe" on page 80).

> **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 GI2.

> **Note:** Each release of GI2 names the GI2 universe identically: `GI2_Universe`. You can distinguish the universe of one release from another by the folder in which it is stored or by its version number (see "Determining the Version of the Universe" on page 80).

5. At the `Change Source` dialog box, shown in Figure 38, click `OK` to have BusinessObjects 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 GI2 7.6.0 release. The `...by VQ` measures were subsequently discontinued and replaced by other measures. Measure descriptions in the

Genesys Interactive Insights 8.1 Universe Guide include the name(s) that you used in prior releases if they differ from the current release.

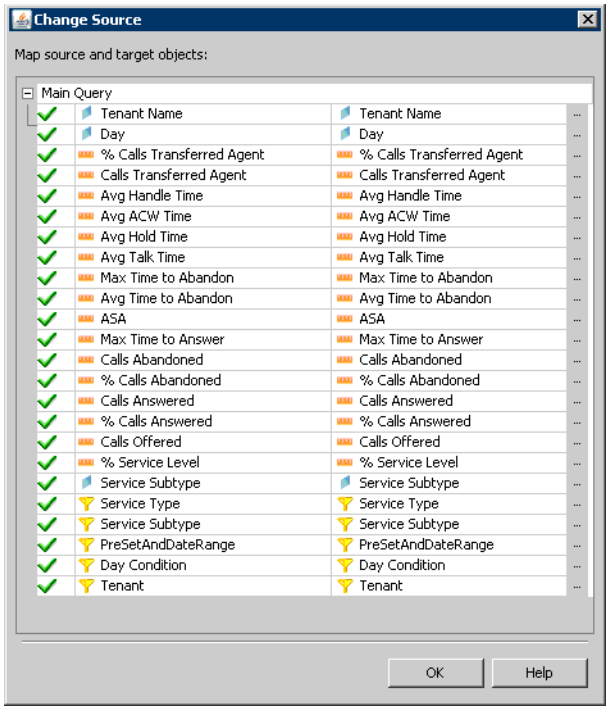


Figure 38: Change Source Dialog Box

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 BO Central Management Console.

1. From CMC, select `Universes`, and navigate to the universe from which you migrated.
2. Right-click the GI2 universe (for example, `GI2_Universe`). From the context menu that appears, select `Tools > Check Relationships`.

   BO displays the object relationships that are associated with the selected universe, including the immediate folder that is storing it, all defined connections from the universe to the data mart, and any reports that access data using universe elements. Figure 39 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.

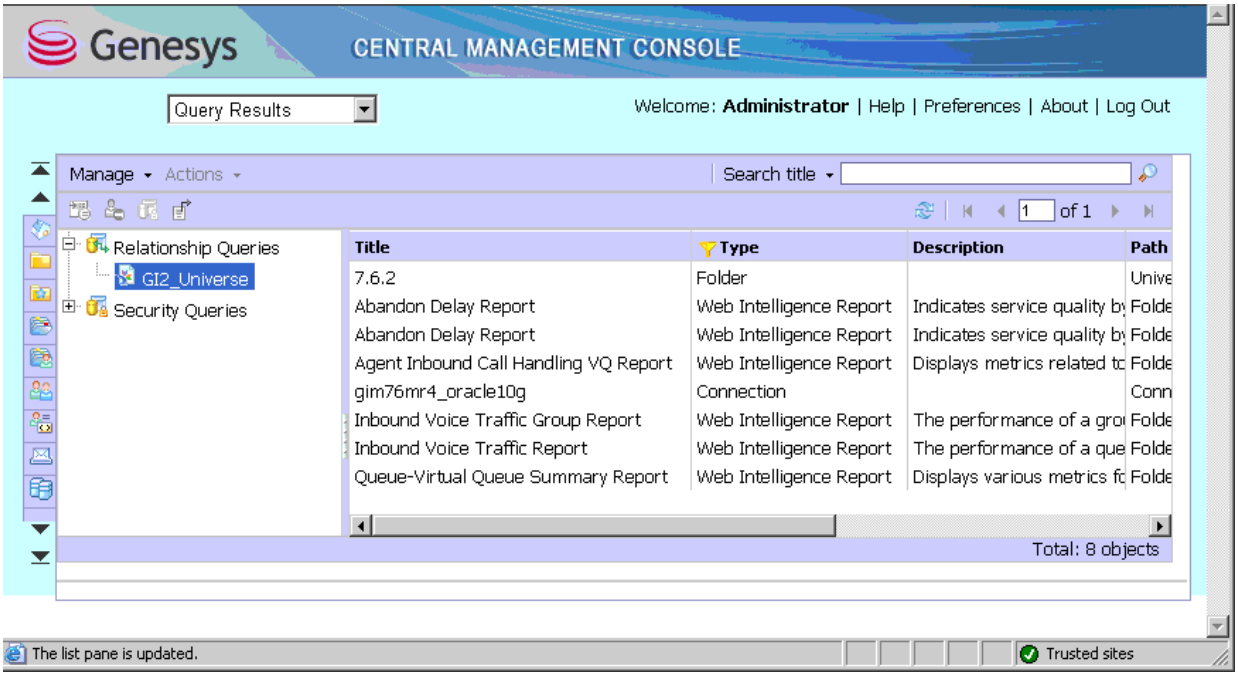


Figure 39: Object Relationships to the Universe

Chapter

7 Uninstalling Genesys Interactive Insights

The setup file that is deployed with Genesys Interactive Insights (GI2) can uninstall the application by removing the majority of files that are deployed during GI2 installation, and removing the application instance from the Microsoft Windows registry. This wizard-driven utility, however, does not remove all traces of GI2 from your computer, deleting neither the GI2 universe nor the GI2 reports. Additional manual cleanup is required if you wish to remove all traces of GI2.

This chapter guides you through the steps that you must perform to uninstall GI2 completely. It contains the following sections:

The GI2 Uninstall Routine

You can uninstall GI2 from the setup file that is provided in the installation package or by using the `Add/Remove Programs` utility that is accessed from the Windows Control Panel.

From Installation Maintenance

1. From the GI2 installation package, double-click the `setup.exe` file.
2. From the `Welcome` page, click `Remove`.

From the Control Panel

1. Select and open `Add/Remove Programs`.
2. Select the GI2 application:
   - `Genesys Interactive Insights 8.1`
3. Click `Add/Remove`.

This routine deletes all of the *deployed* files in the GI2 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 GI2 application, perform each of the following steps to complete the uninstallation of GI2:

1. In the directory in which GI2 is installed, delete the installation's log file (`gi2_deploy_unv_rep.log`).
2. Delete the GI2 directory. 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 BO repository:
   - The GI2 universe:
     - `GI2_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:
     - `Genesys Interactive Insights`

     This action deletes all subfolders and any custom reports that you might have created and stored within this folder as well as those that are provided by Genesys.
   - The Genesys-provided database connection:
     - `GI2_GIM_DB`
   - The GI2 user groups, if you created these manually. Note that this action does not delete the users that are assigned to the groups:
     - `Interactive Insights report developers`
     - `Interactive Insights report editors`
     - `Interactive Insights report viewers`
     - `Interactive Insights report basic` (8.1.3 and later)
     - `Interactive Insights access restrictions` (8.1.4 and later [and 8.1.1 releases beginning with 8.1.104])
   - The GI2 users, if you created these manually:
     - `Developer`
     - `Editor`
     - `Viewer`

    - Basic (8.1.102 and later)
  - The GI2 access levels, if you created these manually:
    - Interactive Insights report developer access level
    - Interactive Insights report editor access level
    - Interactive Insights report viewer access level
    - Interactive Insights report basic access level (8.1.102 and later)

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

4. (8.1.3 and later) Remove the following job:
   - For 8.1.3: Promotion Management -> Promotions Jobs -> 8.1.3
   - For 8.1.4: Promotion Management -> Promotions Jobs -> 8.1.4
5. (Optional) On the computer(s) that was (were) used to import and export the universe, in the BO universe directory, delete both of the following:
   - The universe file:
     - GI2_universe.unv
   - The universe folder:
     - GI2_universe

   The default universe directory is in the following location:

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

These manual steps complete the uninstallation of GI2 from your computer. To go one step further and uninstall the supporting applications and underlying data for GI2, complete the activities that are listed in the next section.

Uninstalling the Supporting Applications and Data

GI2 is powered by the applications that are provided with BO XI suite and the data that is stored in your Info Mart:

- To uninstall BusinessObjects Enterprise, refer to the "Uninstalling BusinessObjects Enterprise" chapter in the *SAP BusinessObjects Enterprise XI 3.1 Installation Guide for Windows (for UNIX)*.
- To uninstall the aggregation engine that creates and populates the AG2_* tables in Info Mart (AGT_* tables in release 8.1.4 and later, and in 8.1.1 releases 8.1.104 and later), refer to the "Uninstalling Reporting and Analytics Aggregates" chapter in the *Reporting and Analytics Aggregates 8.1 Deployment Guide.*

Genesys

Appendix

Application Files

The Genesys Interactive Insights (GI2) installation routine creates a root folder that contains the Business Intelligence Archive Repository (BIAR) of the GI2 universe and supporting files. If you selected a default location for the installation routine to deploy the GI2, the root folder is:

- The `C:\Program Files\GCTI\Genesys Interactive Insights` directory on Windows platforms
- The directory that you specified (Step 8 on page 62) upon installation on UNIX platforms.

Tables 4 and 5 describe the files and subdirectory that make up the root. Not all of these files are deployed for all GI2 8.1 releases. The checkboxes at the top right hand corner of each file's description indicates this information.

Table 4: Contents of the Root Folder

File Name	Description 8.1.0 8.1.1 8.1.3/ 8.1.4
`bo_custom_install.bat` (Windows) `bo_custom_install.sh` (UNIX)	✓ ✓ When it is executed, script that installs the Genesys-customized version of BusinessObjects XI 3.1. **Notes:** • The GI2 installation routine deploys this file even if you select not to install BO. Under such circumstances, to use this script to install BO, you must edit the script to specify BO parameters. • Because this file contains the unencrypted password to Central Management Server (CMS), after installation, consider editing it to remove the password, if you are concerned about security.
`gi2.biar.import.jar`	✓ ✓ Java application that is called by other deployed scripts and enables the import of the GI2 universe, reports, folders, users, user groups, and rights. This file is not deployed for GI2 8.1.3 or 8.1.4. **Note:** This application is reserved for internal use and should not be run directly.

Table 4: Contents of the Root Folder (Continued)

File Name	Description	8.1.0	8.1.1	8.1.3/ 8.1.4
`gi2.upgrade.universe.jar`	Java application that renames report measures from a prior release to the current release. Refer to the section of the *Genesys Interactive Insights 8.1 User's Guide* that deals with Upgrading GI2 Reports for information about this utility. **Note:** This application is reserved for internal use and you should not run it directly.	✓	✓	
`gi2.utils.jar`	Java application that replaces JSP files that are located in the Tomcat directory with Genesys-modified pages, under qualifying circumstances. **Note:** This application is reserved for internal use and should not be run directly.	✓	✓	
`gi2_customize_bo.bat` (Windows) `gi2_customize_bo.sh` (UNIX)	Script that customizes the appearance of BO software with Genesys-specific images and Java Server Pages (JSP) that encompass the Genesys design.	✓	✓	✓
`gi2_deploy_main.bat` (Windows) `gi2_deploy_main.sh` (UNIX)	Script that calls the following scripts: • `gi2_setenv` • `gi2_customize_bo` • `gi2_deploy_unv_rep` • `gi2_deploy_sum`	✓	✓	✓
`gi2_deploy_sum.bat` (Windows) `gi2_deploy_sum.sh` (UNIX)	Script that scans the BO repository for deployed GI2 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 BO parameters that are specified in the `gi2_setenv` script.	✓	✓	
`gi2_deploy_unv_rep.bat` (Windows) `gi2_deploy_unv_rep.sh` (UNIX)	For BO XI 3.x users, this script silently imports the GI2 universe, reports, documentation, and folders into the BO repository. This script prepares the environment for the `biarImport.jar` application and relies on BO parameters that are specified in the `gi2_setenv` script. For BI 4.x users, this script calls the SAP Promotion Management Utility to deploy the GI2 elements into the BO repository using an `.lcm` biar file.	✓	✓	✓

Table 4: Contents of the Root Folder (Continued)

File Name	Description	8.1.0	8.1.1	8.1.3/ 8.1.4
`gi2_deploy_unv_rep.log` (Windows & UNIX)	Log file that contains the results of the GI2 installation. This file is generated every time the `gi2_deploy_unv_rep` script is run.	✓	✓	
`gi2_setenv.bat` (Windows) `gi2_setenv.sh` (UNIX)	Script that sets BO environment variables for connection to the BO repository, based on values that you specified during GI2 installation or that you supply manually. Other scripts rely on the contents of this script to connect to the BO repository. **Note:** Because this file contains the unencrypted password to CMS, after installation, consider editing it to remove the password, if you are concerned about security.	✓	✓	✓
`gi2_upgrade_universe.bat` (Windows) `gi2_upgrade_universe.sh` (UNIX)	Script that calls the `gi2.upgrade.universe` utility.	✓	✓	
`insights.biar` (8.1.0, 8.1.1) `insights.lcmbiar` (8.1.3, 8.1.4)	BIAR that contains an export of the GI2 universe, reports, PDF documents, measure maps, folders, users, groups, and their permissions.	✓	✓	✓
`ip_description.xml`	File that lists the contents of the installation package.	✓	✓	✓
`read_me.html`	File that contains general information about the installation package.	✓	✓	✓
`agg`	Subfolder that contains files that support the Reporting and Analytics Aggregates (RAA) component of Genesys Info Mart. Refer to the "Application Files" chapter in the *Reporting and Analytics Aggregates 8.1 Deployment Guide* for the description of files in this folder.	✓	✓	✓
`com`	Subfolder that contains customization files.	✓	✓	
`conf`	Subfolder that contains configuration files. See Table 5.	✓	✓	✓
`res`	Subfolder that contains additional customization files, such as JavaServer Pages and the Genesys logos that are displayed on the CMC and InfoView login screens.	✓	✓	✓

Table 5: Contents of the conf Subfolder

File Name	Description	8.1.0	8.1.1	8.1.3/ 8.1.4
`diff.json`	File that the upgrade utility references to rename report measures. This utility is described in chapter of the *Genesys Interactive Insights 8.1 User's Guide* that deals with Upgrading GI2 Reports.	✓	✓	
`gi2.json`	Configuration file for the `biar import` utility (see `gi2.biar.import.jar` in Table 4) that checks for existing objects.	✓	✓	
`log4j.properties`	Configuration file of logging parameters for the `biar import` utility.	✓	✓	
`biar properties`	File that is generated during installation when the `gi2_deploy_unv_rep.bat/sh` script is run.	✓	✓	✓

Related Documentation Resources

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

SAP BusinessObjects XI 3.1

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

- *SAP BusinessObjects XI 3.1 Performing On-Report Analysis with SAP BusinessObjects Web Intelligence*
- *SAP BusinessObjects XI 3.1 Building Queries with SAP BusinessObjects Web Intelligence Query - HTML*
- *SAP BusinessObjects XI 3.1 Universe Designer*

The complete set of BO XI documentation is available, for customers who obtained BO from Genesys, through the following URL:

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

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

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

SAP BusinessObjects Business Intelligence Platform 4.1

- *Business Intelligence Platform User Guide—SAP BusinessObjects Business Intelligence Platform 4.1 Support Package 1*
- *Business Intelligence Platform User Guide—SAP BusinessObjects Business Intelligence Platform 4.1 Support Package 2*
- *SAP BusinessObjects BI4 Sizing Companion Guide*
- *Business Intelligence Platform Administrator Guide—SAP BusinessObjects Business Intelligence Platform 4.1 Support Package 2*
- *Business Intelligence Platform Installation Guide for Unix—SAP BusinessObjects Business Intelligence Platform 4.1 Support Package 2*
- *Business Intelligence Platform Installation Guide for Windows—SAP BusinessObjects Business Intelligence Platform 4.1 Support Package 2*
- *Business Intelligence platform Architecture Diagram 4.1*
- *SAP BusinessObjects BI 4.1 Supported Platforms*

Genesys Interactive Insights

- *Genesys Interactive Insights 8.1 Universe Guide,* which describes, in detail, the reports and measures that are provided in the Genesys Interactive Insights (GI2) release
- *Genesys Interactive Insights 8.1 User's Guide,* which summarizes how to operate GI2 reports by using InfoView and provides basic instruction for customizing your own reports

- Release Notes and Product Advisories for this product, which are available on the Genesys Customer Care website.

Genesys Info Mart

- The Genesys Info Mart 8.1 documentation set, including the following manuals:
  - *Genesys Info Mart 8.1 Reference Manual* for your particular RDBMS type, for table and field descriptions of the Info Mart
  - *Genesys Info Mart 8.1 Deployment Guide,* which will help you configure and install Genesys Info Mart 8.1

Reporting and Analytics Aggregates

- *Reporting and Analytics Aggregates 8.1 Deployment Guide,* which describes how to deploy this option of Genesys Info Mart
- *Reporting and Analytics Aggregates 8.1 Reference Manual,* which describes the aggregate subject areas, tables, and columns
- *Reporting and Analytics Aggregates 8.1 User's Guide,* which describes how the aggregation process works

Genesys

- *Genesys Technical Publications Glossary,* available on the Genesys Documentation website, provides a comprehensive list of the Genesys and computer-telephony integration (CTI) terminology and acronyms used in this document.
- *Genesys Migration Guide*, available on the Genesys Documentation website and which ships on the Genesys Documentation Library DVD, provides documented migration strategies for Genesys product releases. Contact Genesys Customer Care for more information.

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

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

Consult the following additional resources as necessary:

- *Genesys Hardware Sizing Guide,* which provides information about Genesys hardware sizing guidelines for the Genesys 8.x releases.

For additional system-wide planning tools and information, see the release-specific listings of System-Level Documents on the Genesys Documentation website (docs.genesys.com).

Genesys product documentation is available on the:

- Genesys Customer Care website at http://genesys.com/customer-care.
- Genesys Documentation site at http://docs.genesys.com/.
- Genesys Documentation Library DVD, which you can order by e-mail from Genesys Order Management at orderman@genesys.com.

Document Conventions

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

Document Version Number

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

81ii_dep_05-2013_v8.1.300.02

You will need this number when you are talking with Genesys Customer Care about this product.

Screen Captures Used in This Document

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

Type Styles

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

Table 7: Type Styles

Type Style	Used For	Examples
Italic	• Document titles • Emphasis • Definitions of (or first references to) unfamiliar terms • Mathematical variables Used also to indicate placeholder text within code samples or commands, in the special case in which angle brackets are a required part of the syntax (see the note about angle brackets on page 116).	Please consult the *Genesys Migration Guide* for more information. Do *not* use this value for this option. A *customary and usual* practice is one that is widely accepted and used within a particular industry or profession. The formula $x + 1 = 7$, where x stands for . . .

Table 7: Type Styles (Continued)

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

Index

Symbols

Numerics

A

B

C

D

E

F

G

H

I

L

M

N

O

P

R

S

T

U

V

W

X