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Preface

This document describes the steps to upgrade your Omni-Insurance Business Content for Omni-Insurance Version 3.12+ on Windows platforms.

How This Manual Is Organized

This manual includes the following chapters:

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<tr>
<th>Chapter/Appendix</th>
<th>Contents</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Upgrading Omni-Insurance Business Content for Version 3.12+ on Windows Platforms</td>
</tr>
</tbody>
</table>

Describes how to upgrade your Omni-Insurance Business Content for version 3.12+ on Windows platforms.

Documentation Conventions

The following table lists and describes the documentation conventions that are used in this manual.

<table>
<thead>
<tr>
<th>Convention</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>THIS TYPEFACE</td>
<td>Denotes syntax that you must type exactly as shown.</td>
</tr>
<tr>
<td>or</td>
<td></td>
</tr>
<tr>
<td>this typeface</td>
<td></td>
</tr>
<tr>
<td>this typeface</td>
<td>Represents a placeholder (or variable), a cross-reference, or an important term. It may also indicate a button, menu item, or dialog box option that you can click or select.</td>
</tr>
<tr>
<td>underscore</td>
<td>Indicates a default setting.</td>
</tr>
<tr>
<td>Key + Key</td>
<td>Indicates keys that you must press simultaneously.</td>
</tr>
<tr>
<td>{}</td>
<td>Indicates two or three choices. Type one of them, not the braces.</td>
</tr>
<tr>
<td></td>
<td>Separates mutually exclusive choices in syntax. Type one of them, not the symbol.</td>
</tr>
<tr>
<td>...</td>
<td>Indicates that you can enter a parameter multiple times. Type only the parameter, not the ellipsis (...).</td>
</tr>
<tr>
<td>Convention</td>
<td>Description</td>
</tr>
<tr>
<td>------------</td>
<td>-------------</td>
</tr>
<tr>
<td>.</td>
<td>Indicates that there are (or could be) intervening or additional commands.</td>
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<td>.</td>
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</tbody>
</table>

**Related Publications**

Visit our Technical Documentation Library at [http://documentation.informationbuilders.com](http://documentation.informationbuilders.com). You can also contact the Publications Order Department at (800) 969-4636.

**Customer Support**

Do you have questions about this product?

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You can also access support services electronically, 24 hours a day, with InfoResponse Online. InfoResponse Online is accessible through our website, [http://www.informationbuilders.com](http://www.informationbuilders.com). It connects you to the tracking system and known-problem database at the Information Builders support center. Registered users can open, update, and view the status of cases in the tracking system and read descriptions of reported software issues. New users can register immediately for this service. The technical support section of [www.informationbuilders.com](http://www.informationbuilders.com) also provides usage techniques, diagnostic tips, and answers to frequently asked questions.

Call Information Builders Customer Support Services (CSS) at (800) 736-6130 or (212) 736-6130. Customer Support Consultants are available Monday through Friday between 8:00 A.M. and 8:00 P.M. EST to address all your questions. Information Builders consultants can also give you general guidance regarding product capabilities. Be prepared to provide your six-digit site code (xxxx.xx) when you call.

To learn about the full range of available support services, ask your Information Builders representative about InfoResponse Online, or call (800) 969-INFO.

**Help Us to Serve You Better**

To help our consultants answer your questions effectively, be prepared to provide specifications and sample files and to answer questions about errors and problems.
The following table lists the environment information that our consultants require.

<table>
<thead>
<tr>
<th>Platform</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Operating System</td>
<td></td>
</tr>
<tr>
<td>OS Version</td>
<td></td>
</tr>
<tr>
<td>JVM Vendor</td>
<td></td>
</tr>
<tr>
<td>JVM Version</td>
<td></td>
</tr>
</tbody>
</table>

The following table lists additional questions to help us serve you better.

<table>
<thead>
<tr>
<th>Request/Question</th>
<th>Error/Problem Details or Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Did the problem arise through a service or event?</td>
<td></td>
</tr>
<tr>
<td>Provide usage scenarios or summarize the application that produces the problem.</td>
<td></td>
</tr>
<tr>
<td>When did the problem start?</td>
<td></td>
</tr>
<tr>
<td>Can you reproduce this problem consistently?</td>
<td></td>
</tr>
<tr>
<td>Describe the problem.</td>
<td></td>
</tr>
<tr>
<td>Describe the steps to reproduce the problem.</td>
<td></td>
</tr>
<tr>
<td>Specify the error messages.</td>
<td></td>
</tr>
<tr>
<td>Any change in the application environment: software configuration, EIS/database configuration, application, and so forth?</td>
<td></td>
</tr>
</tbody>
</table>
### Request/Question

Under what circumstance does the problem *not* occur?

### Error/Problem Details or Information

The following is a list of error and problem files that might be applicable.

- Input documents (XML instance, XML schema, non-XML documents)
- Transformation files
- Error screen shots
- Error output files
- Trace files
- Service Manager package to reproduce problem
- Custom functions and agents in use
- Diagnostic Zip
- Transaction log

For information on tracing, see the *iWay Service Manager User's Guide*.

### User Feedback

In an effort to produce effective documentation, the Technical Content Management staff welcomes your opinions regarding this document. Please use the Reader Comments form at the end of this document to communicate your feedback to us or to suggest changes that will support improvements to our documentation. You can also contact us through our website, [http://documentation.informationbuilders.com/connections.asp](http://documentation.informationbuilders.com/connections.asp).

Thank you, in advance, for your comments.

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For information on course descriptions, locations, and dates, or to register for classes, visit our website, [http://education.informationbuilders.com](http://education.informationbuilders.com), or call (800) 969-INFO to speak to an Education Representative.
Interested in technical assistance for your implementation? Our Professional Services department provides expert design, systems architecture, implementation, and project management services for all your business integration projects. For information, visit our website, http://www.informationbuilders.com/consulting.
Omni-Insurance Business Content releases allow you to receive the latest pre-built insurance-specific content on more regular intervals than upgrades to the underlying engine.

The data model, reference data, consumption and metrics views, and pre-built WebFOCUS content can all be updated within the context of an Omni-Insurance Business Content release without the need to upgrade your underlying core engine. This allows us to be more agile in providing you our latest business content innovations for Omni-Insurance.

This chapter describes how to apply your Omni-Insurance Business Content release for version 3.12+ on Windows platforms.

In this chapter:

- Completing Upgrade Prerequisites
- Upgrading Omni-Insurance Business Content

Completing Upgrade Prerequisites

If you are applying your Omni-Insurance Business Content for the first time, skip to How to Download the Latest Version of Omni-Insurance Business Content on page 14.

This following section describes prerequisite steps that are required to upgrade your existing Omni-Insurance Business Content:

1. If actively using Omni Governance Console (OGC), backup your MData.
   
   For more information, see How to Backup Your MData in Omni Governance Console on page 12.

2. Stop all services and the Omni Controller.
   
   For more information, see How to Stop All Services and the Controller on page 12.

3. Ensure that no consumption or metrics view content is running, and backup your consumption and metrics folders.
   
   For more information, see How to Backup the Consumption Views on page 13 and How to Backup the Metrics Views on page 13.
   For more information, see *How to Backup Omni-Insurance Databases* on page 14.

5. Backup your *omnigen* home directory.
   For more information, see *How to Backup the Omnigen Home Directory* on page 13.

6. Download and unzip the latest version of Omni-Insurance Business Content.
   For more information, see *How to Download the Latest Version of Omni-Insurance Business Content* on page 14.

7. Start the Omni Controller.
   For more information, see *How to Start the Controller* on page 14.

**Procedure:** *How to Backup Your MData in Omni Governance Console*

1. Log on to the Omni Governance Console (OGC) to download metadata using your browser.
   For example:
   
   ```
   http://omni_insurance.ibi.com:9501/ogc
   ```

2. Log on using the preauthorized WSO2 Identity Server local (primary) credentials.
   For example:
   
   ```
   Username: primary/super_a
   Password: supera123
   ```

3. Click *Administration* in the top menu, then select *Download Metadata* from the navigation bar.

4. Save the MData.xml file in the location where you store your backups.

**Procedure:** *How to Stop All Services and the Controller*

1. Ensure that no work orders are currently running in the Omni Console.

2. Navigate to the *OmniServer* home directory.
   For example:
   
   ```
   C:\omni_insurance\omnigen\OmniServer
   ```

3. Open a command prompt window and type the following command to stop all services:
   
   ```
   omni stop-all
   ```
4. Upon successful notification that all services are stopped, type the following command to stop the controller:

   omni stop-controller

**Procedure:** How to Backup the Omnigen Home Directory

1. Navigate to the `omni_insurance` subdirectory where your base installation is located. For example:

   C:\omni_insurance\

2. Create a zip file of the omnigen directory, and put it in the location where you store your backups, renaming it as appropriate:

   For example:

   omnigen_<project_revision>

**Procedure:** How to Backup the Consumption Views

1. Navigate to the location where you installed your consumption views. For example:

   C:\omni_insurance\consumption

2. Create a zip file of the consumption directory, and move it to the location where you store your backups, renaming it as appropriate:

   For example:

   consumption_<project_revision>

**Procedure:** How to Backup the Metrics Views

1. Navigate to the location where you installed your metrics views. For example:

   C:\omni_insurance\metrics

2. Create a zip file of the metrics directory, and move it to the location where you store your backups, renaming it as appropriate:

   For example:

   metrics_<project_revision>
Procedure: How to Backup Omni-Insurance Databases

Upon successful shutdown of all the services and the controller, backup the corresponding omni_insurance, omnirepo, consumption, and metrics databases for the Omni-Insurance environment you want to upgrade, as appropriate for your RDBMS.

Procedure: How to Download the Latest Version of Omni-Insurance Business Content

1. Download the Omni-Insurance Business Content zip file (for example, omni-insurance-18.0.0.zip) from the Information Builders Technical Support Center at:
   
   https://techsupport.informationbuilders.com

2. Paste the zip file in the directory where you installed Omni-Insurance.

   For example:

   C:\omni_insurance

3. Unzip the Omni-Insurance Business Content release zip file into this directory. This will place the contents of the Business Content release into the following folder, for further deployment.

   C:\omni_insurance\omnigen\OmniGenData\business_content\omni_insurance

Procedure: How to Start the Controller

1. Navigate to the OmniServer home directory.

   For example:

   C:\omni_insurance\omnigen\OmniServer

2. Open a command prompt window and type the following command to start the controller:

   omni start-controller

Upgrading Omni-Insurance Business Content

This section describes the set of steps required for installing or upgrading your Omni-Insurance Business Content, such as deploying the new bundle, upgrading consumption and metrics views, and applying your new WebFOCUS Change Management package for Omni-Insurance version 3.12+.

1. Apply model changes by deploying the updated bundle.

   For more information, see How to Deploy Your Bundle on page 15.
2. Start your services.
   For more information, see *How to Start Omni Services* on page 19.

3. If using OGC, update your mdata.
   For more information, see *How to Update Metadata in Omni Governance Console* on page 19.

4. Apply your reference data updates.
   For more information, see *How to Update Reference Data* on page 20.

5. Update and execute the Consumption views.
   For more information, see *How to Upgrade Consumption Views* on page 21.

6. Update and execute the Metrics views.
   For more information, see *How to Upgrade Metrics Views* on page 24.

   For more information, see *How to Upgrade the Omni-Insurance WebFOCUS Change Management Package* on page 25.

**Procedure:** How to Deploy Your Bundle

1. Type the following URL in your browser to access the Omni Console:
   
   https://yourhost.yourdomain.com:9500

   For example:
   
   https://omni_insurance.ibi.com:9500

   **Note:** You cannot use localhost in the URL.

2. Log on using the following credentials:

   ☐ Username: *ibi*
   
   ☐ Password: *ibi*

3. Deploy the bundle by clicking *Deployment* in the left pane.
If this is your first time deploying a bundle into Omni-Insurance, the Deployment Bundle Not found message displays, as shown in the following image. Otherwise, proceed to step 5.

4. Click **Install Bundle**, as shown in the following image.

The Open dialog box displays. Skip the next step, and proceed to step 6.
5. If this is not your first time deploying a bundle into Omni-Insurance, you may select *Update Data Model* from the Deploy Bundle drop-down list, as shown in the following image.

![Deployment Menu](image)

6. Navigate to the location of your deployment bundle file, which is located in the following directory on Windows platforms:

   `C:\omni_insurance\omnigen\OmniGenData\business-content\omni-insurance\omni-insurance-18.0.0-deployment-bundle.zip`

7. Select your deployment bundle file and click *Open*.

   A blank Deployment Progress window opens, as shown in the following image.

![Deployment Progress](image)
The Deployment Progress window will start to display information and progress during the whole deployment process, as shown in the following image.

When the process is complete, a *successfully installed* message displays, as shown in the following image.
**Procedure:** How to Start Omni Services

Start the Omni Server and the related services by clicking Services in the left pane of the Omni Console and then clicking Start All.

If the memory of your computer is insufficient, you can also start each individual service one at a time, starting from the Utilities section and working upwards.

**Procedure:** How to Update Metadata in Omni Governance Console

1. Sign in to the Omni Governance Console (OGC) and load the metadata into your browser.

   For example:

   http://omni_insurance:9501/ogc

2. Sign in using the preauthorized WSO2 Local (Primary) credentials, which can be used to perform other startup actions until site-specific credentials and permissions are added.

   For example:

   - Username: primary/super_a
   - Password: supera123

   If metadata has not yet been uploaded, the Omni Governance Console Setup page opens, as shown in the following image.

3. Click Upload Meta Data.
The Upload Metadata dialog box appears, as shown in the following image.

4. Click Choose File and navigate to the following folder:
   C:\data\omni\product\omni_insurance\omnigen\OmniGenData\mdata

5. Select the MData.xml file.

6. Ensure that the Validate after upload check box is selected, and then click Upload.

OGC opens and displays the 360 Viewer page, as shown in the following image.

Omni Server and OGC are now installed and ready for use.

Procedure: How to Update Reference Data

1. Ensure your services are running in the Omni Console.

2. Navigate to the directory where you unzipped your Omni-Insurance Business Content.
   For example:
   C:\omni_insurance\omnigen\OmniGenData\business-content\omni-insurance
   For example:
   
   C:\omni_insurance\omnigen\OmniGenData\business-content\omni-insurance\reference-data

4. Copy all *.xml documents in the Codesets directory.
   For example:

   C:\omni_insurance\omnigen\OmniGenData\business-content\omni-insurance\reference-data\Codesets

5. Navigate to the oid input directory of your Omni-Insurance installation, and paste the documents you copied into the input directory.
   For example:

   C:\omni_insurance\omnigen\OmniGenData\input\oid\input

   After a moment, those documents will disappear and be processed. You can ensure successful execution in the Omni Console.

   For example:

   C:\omni_insurance\omnigen\OmniGenData\business-content\omni-insurance\reference-data\Maps

7. Navigate to the oid input directory of your Omni-Insurance installation, and paste the documents you copied into the input directory.
   For example:

   C:\omni_insurance\omnigen\OmniGenData\input\oid\input

   After a moment, those documents will disappear and be processed. You can ensure successful execution in the Omni Console.

**Procedure:** How to Upgrade Consumption Views

1. Navigate to the directory where you unzipped your Omni-Insurance Business Content.
   For example:

   C:\omni_insurance\omnigen\OmniGenData\business-content\omni-insurance
2. Navigate to the consumption-views directory.
   For example:
   
   C:\omni_insurance\omnigen\OmniGenData\business-content\omni-insurance
   \consumption-views

3. Proceed to the next step if you have previously installed your stored_procs. Otherwise, see
   How to Install the Stored Procedures on page 23.

4. After confirming that the stored_procs are installed, copy all *.sql scripts in the
   consumption-views directory.
   For example:
   
   C:\omni_insurance\omnigen\OmniGenData\business-content\omni-insurance
   \consumption-views

   **Note:** If you are installing for the first time, also include the following files in your copy:
   build_all.cmd, set_build_params.bat, and set_config.bat

5. Navigate to the directory where your consumption views will be executed, and paste the
   scripts you copied into the consumption directory.
   For example:
   
   C:\omni_insurance\consumption

6. Proceed to the next step if you have previously configured your consumption views and
   there are no changes to the build_all.cmd, set_build_params.bat, and set_config.bat in the
   release notes. Otherwise, see How to Configure Consumption Views on page 22.

7. Execute the consumption views by executing the following command:
   
   build_all.cmd > [logfile_name].log

   The build_all.cmd file executes every .sql script in the current directory and runs them in
   order, using the configuration information defined above. It is recommended to pipe the
   output of the run to a log file so that error-free execution can be confirmed.

**Procedure:** How to Configure Consumption Views

1. If there are changes to the build_all.cmd, set_build_params.bat, and set_config.bat file in
   the Omni-Insurance Business Content Release Guide, and you have previously configured
   your consumption views, merge the new content with your previous configuration.

2. Otherwise, if this is your first time configuring your consumption views, update the
   following environment variables in the build_all.cmd file. These parameters are used
   throughout the consumption views.
The settings are as follows:

- set target_server=name of the server hosting the database.
- set user=user name to execute the scripts.
- set password=password for that user.
- set target_db=target database, usually consumption.
- set source_db=source database, usually omni_insurance.
- set check_source=whether or not to check if the script needs to be run set, usually N.
- set debug_query=turns debugging of source check on and off, usually N.

**Procedure: How to Install the Stored Procedures**

1. **Navigate to the consumption-views\stored_procs folder.**
   
   For example:
   
   ```
   C:\omni_insurance\omnigen\OmniGenData\business-content\omni-insurance
   \consumption-views\stored_procs
   ```
   
2. **Execute the hash64.sql script in the consumption database.**
   
   After execution, dbo.hash64 should be listed as a scalar-valued function for the consumption database. Consumption uses the hash64 function to create unique hashed values for ID fields, which are indexed and used for joining.

3. **Execute the split_part.sql script in the consumption database.**
   
   After execution, dbo.split_part should be listed as a scalar-valued function in the consumption database. The split_part function is used to divide data fields into smaller blocks and only use part of that block.

4. **Execute the p_hvtabstatcollector.sql script in the consumption database.**
   
   After execution, dbo.p_hvtabstatcollector should be listed as a stored procedure in the consumption database. This function can be used to compile statistics on the consumption view data. It tracks the amount of records in each consumption views table and also the number of records added since the last time the table was updated.

5. **Execute the p_count_og_table_rows.sql script in the omni_insurance database.**
   
   After execution, dbo.p_count_og_table_rows should be listed as a stored procedure in your omni_insurance database. This function is used to determine the number of rows in each table in the omni_insurance database, which can be useful for comparing to consumption views.
**Note:** Ensure that the first line in the script matches the name you have chosen for your omni_insurance database.

**Procedure:** How to Upgrade Metrics Views

1. Navigate to the directory where you unzipped your Omni-Insurance Business Content. For example:
   
   `C:\omni_insurance\omnigen\OmniGenData\business-content\omni-insurance`

2. Navigate to the metrics-views directory. For example:
   
   `C:\omni_insurance\omnigen\OmniGenData\business-content\omni-insurance\metrics-views`

3. Copy all *.sql scripts in the metric-views directory. For example:
   
   `C:\omni_insurance\omnigen\OmniGenData\business-content\omni-insurance\metric-views`

   **Note:** If you are installing for the first time, also include the following files in your copy: `mv_build_all.bat`, `set_mv_metrics_params.bat`, and `set_config.bat`.

4. Navigate to the directory where your metrics views will be executed, and paste the scripts you copied into the metrics directory. For example:
   
   `C:\omni_insurance\metrics`

5. Proceed to the next step if you have previously configured your metrics views and there are no changes to the `mv_build_all.bat`, `set_mv_metrics_params.bat`, and `set_config.bat` files in the *Business Content Release Guide*. Otherwise, see *How to Configure Metrics Views* on page 25.

6. Execute the metrics views by executing the following command:

   `mv_build_all.bat > [logfile_name].log`

   The build_all.cmd file executes every .sql script in the current directory and runs them in order, using the configuration information defined above. It is recommended to pipe the output of the run to a log file so that error-free execution can be confirmed.
**Procedure:** How to Configure Metrics Views

1. If there are changes to the `mv_build_all.bat`, `set_mv_metrics_params.bat`, and `set_config.bat` in the *Business Content Release Guide*, and you have previously configured your metrics views, merge the new content with your previous configuration.

2. Otherwise, if this is your first time configuring your metrics views, update the following environment variables in the `mv_build_all.cmd` file. These parameters are used throughout the metrics views.

   The settings are as follows:
   - set target_server= name of the server hosting the database.
   - set user= user name to execute the scripts.
   - set password= password for that user.
   - set omni_db= omni repository, usually omni_insurance.
   - set target_db= target database, usually metrics.
   - set source_db= source database, usually consumption.
   - set valueset_source= consumption.dbo.v_dim_codemap_lookup.
   - set temp_db= tempdb.
   - set check_source= whether or not to check if the script needs to be run, usually N.
   - set debug_query= turns debugging of source check on and off, usually N.

3. For information on configuring `set_mv_metrics_params.bat`, consult the in-line documentation in the file, which will guide you on the appropriate settings.

**Procedure:** How to Upgrade the Omni-Insurance WebFOCUS Change Management Package

1. Browse to the location of the updated WebFOCUS Change Management Package (omni-insurance-18.0.0-webfocus-change-management.zip), which is located in the following directory on Windows platforms:

   \C:\omni_insurance\omnigen\OmniGenData\business-content\omni-insurance

2. Navigate to the location where your WebFOCUS environment was implemented.

3. Create a database connection called omnipoc with the same database connection parameters that you used for configuring consumption and metrics views.

   For additional information on applying your change management package within your WebFOCUS implementation, see *WebFOCUS Change Management*, in the *WebFOCUS Security Administration* manual.
Upon successful application of your WebFOCUS Change Management package, authorized users will see the Omni-Insurance Analytics workspace reflected in the WebFOCUS implementation, as shown in the following image.

**Note:** It is strongly recommended that you do not directly manipulate the Omni-Insurance Analytics workspace, as future business release updates may overwrite your changes.

You can now create your workspace into which you may copy content for customization, or from which you may refer to content provided in the Omni-Insurance Analytics Workspace.
Feedback

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