TIBCO Omni-Gen®

TIBCO Omni-Insurance™ Business Content Upgrade Guide

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Contents

Chapter 1

Upgrading Omni-Insurance Business Content for Version 3.12+ on Windows Platforms

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

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 8.

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 6.

2. Stop all services and the Omni Controller.

   For more information, see *How to Stop All Services and the Controller* on page 6.

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 7 and *How to Backup the Metrics Views* on page 7.

4. Backup your Omni-Insurance databases.

   For more information, see *How to Backup Omni-Insurance Databases* on page 8.

5. Backup your *omnigen* home directory.

   For more information, see *How to Backup the Omnigen Home Directory* on page 7.

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 8.

7. Start the Omni Controller.

   For more information, see *How to Start the Controller* on page 8.

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 9.

2. Start your services.

   For more information, see *How to Start Omni Services* on page 13.

3. If using OGC, update your mdata.

   For more information, see *How to Update Metadata in Omni Governance Console* on page 13.

4. Apply your reference data updates.

   For more information, see *How to Update Reference Data* on page 14.

5. Update and execute the Consumption views.

   For more information, see *How to Upgrade Consumption Views* on page 15.

6. Update and execute the Metrics views.

   For more information, see *How to Upgrade Metrics Views* on page 18.

7. Apply your Omni-Insurance WebFOCUS Change Management Package.

   For more information, see *How to Upgrade the Omni-Insurance WebFOCUS Change Management Package* on page 19.

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`

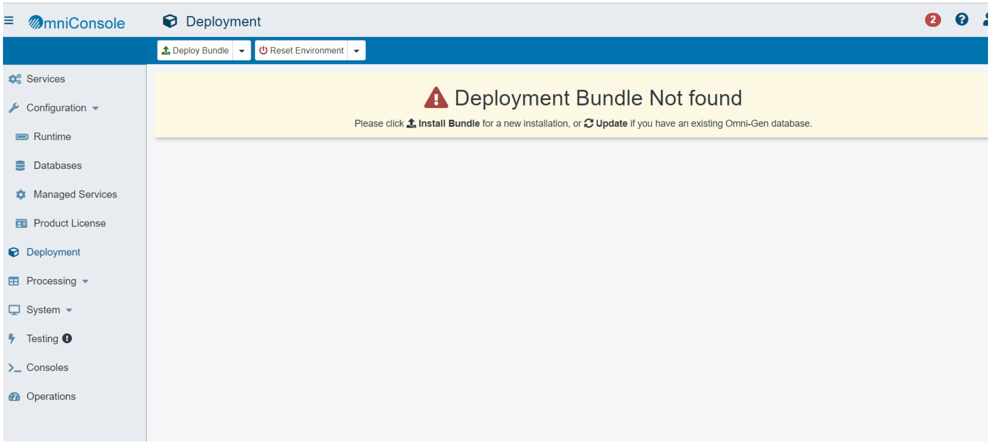
   Note: You cannot use *localhost* in the URL.

2. Log on using the following credentials:

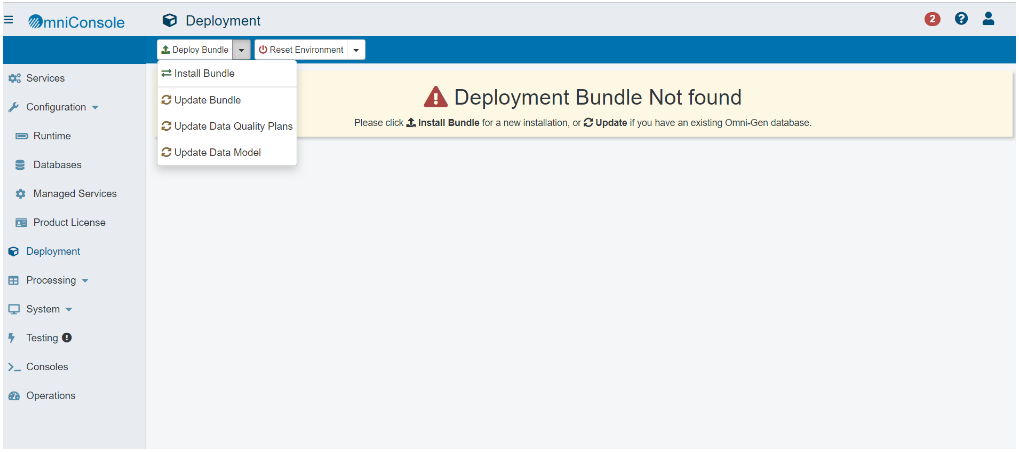
   - Username: **ibi**
   - Password: **ibi**

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.

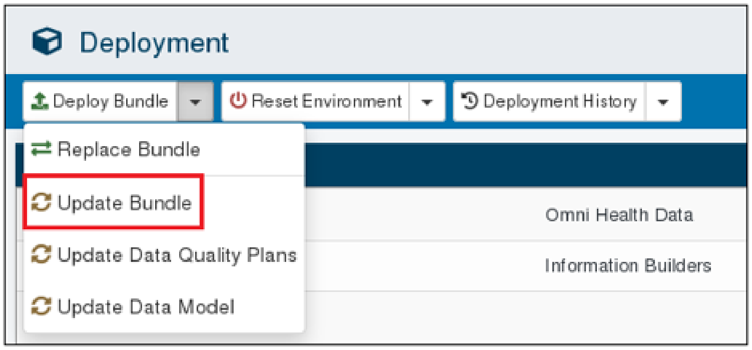


4. Click *Install Bundle*, as shown in the following image.



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



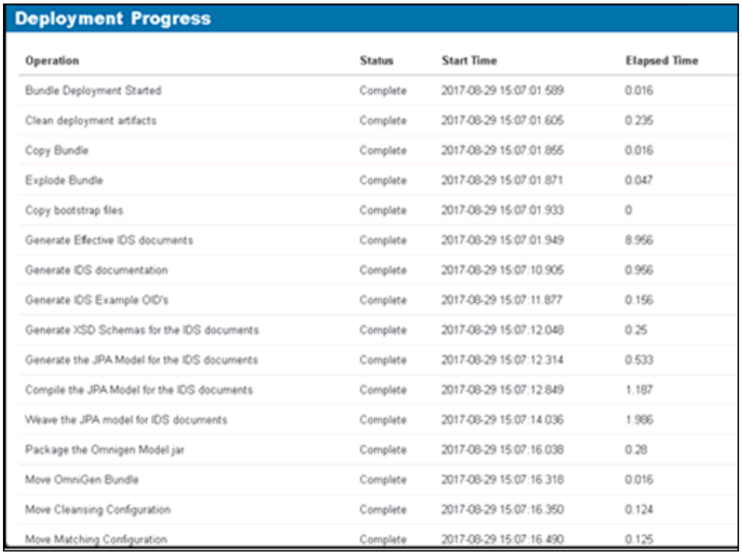
6. Navigate to the location of your deployment bundle file, which is located in the following directory on Windows platforms:

   `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.

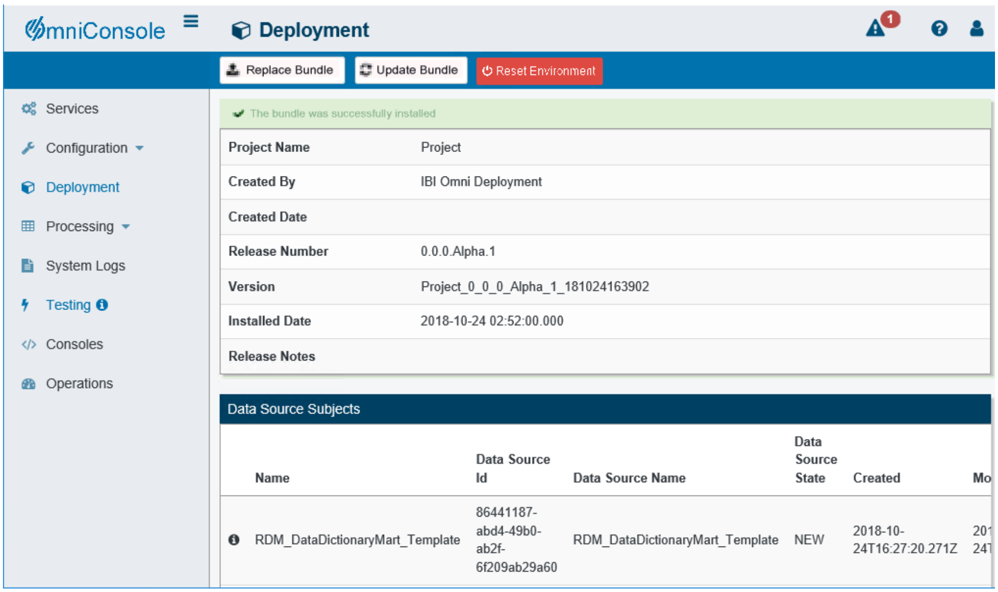
The Deployment Progress window will start to display information and progress during the whole deployment process, as shown in the following image.



Deployment Progress

Operation	Status	Start Time	Elapsed Time
Bundle Deployment Started	Complete	2017-08-29 15:07:01.589	0.016
Clean deployment artifacts	Complete	2017-08-29 15:07:01.605	0.235
Copy Bundle	Complete	2017-08-29 15:07:01.855	0.016
Explode Bundle	Complete	2017-08-29 15:07:01.871	0.047
Copy bootstrap files	Complete	2017-08-29 15:07:01.933	0
Generate Effective IDS documents	Complete	2017-08-29 15:07:01.949	8.956
Generate IDS documentation	Complete	2017-08-29 15:07:10.905	0.956
Generate IDS Example OID's	Complete	2017-08-29 15:07:11.877	0.156
Generate XSD Schemas for the IDS documents	Complete	2017-08-29 15:07:12.048	0.25
Generate the JPA Model for the IDS documents	Complete	2017-08-29 15:07:12.314	0.533
Compile the JPA Model for the IDS documents	Complete	2017-08-29 15:07:12.849	1.187
Weave the JPA model for IDS documents	Complete	2017-08-29 15:07:14.036	1.986
Package the Omnigen Model jar	Complete	2017-08-29 15:07:16.038	0.28
Move OmniGen Bundle	Complete	2017-08-29 15:07:16.318	0.016
Move Cleansing Configuration	Complete	2017-08-29 15:07:16.350	0.124
Move Matching Configuration	Complete	2017-08-29 15:07:16.490	0.125

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:

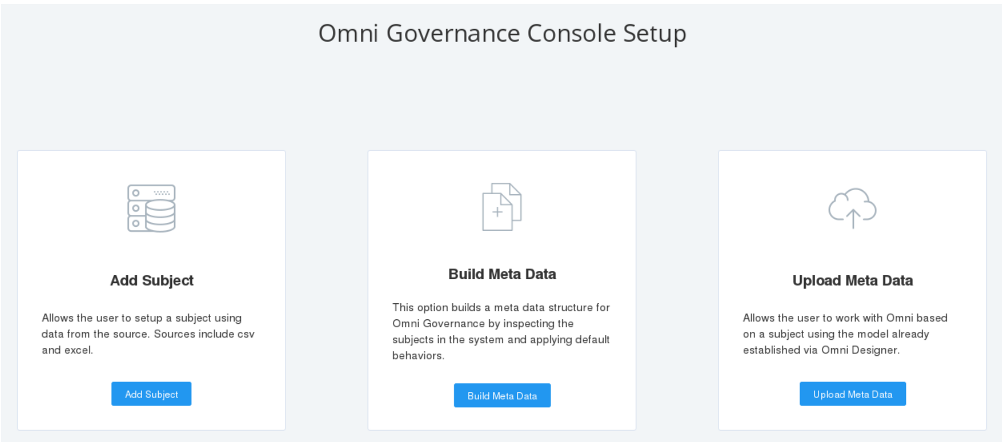
   `http://omni_insurance:9501/ogc`

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:

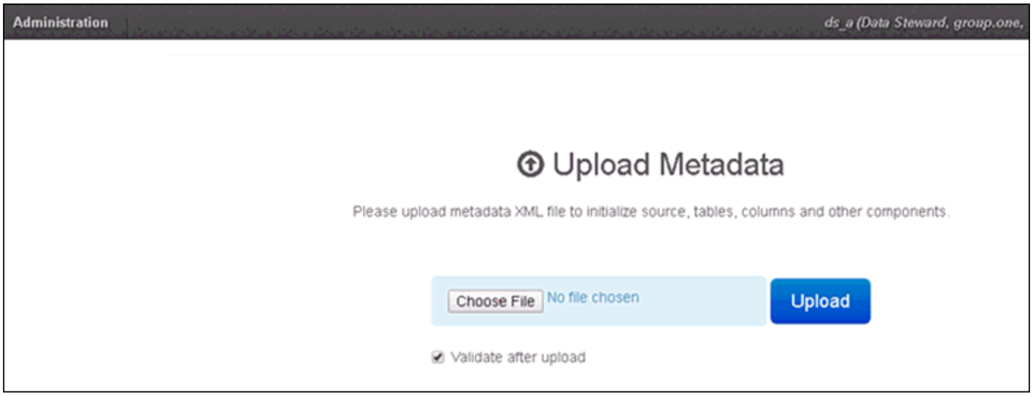
   - Username: **primary/super_a**
   - Password: **supera123**

     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.



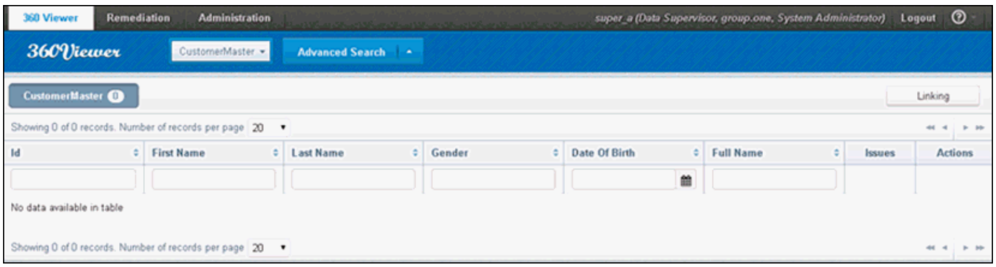
4. Click *Choose File* and navigate to the following folder:

   `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`

3. Navigate to the reference-data directory.

   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.

6. Copy all *.xml documents in the Maps directory.

   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 17.

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 16.

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_hvtabstatscollector 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 19.

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.

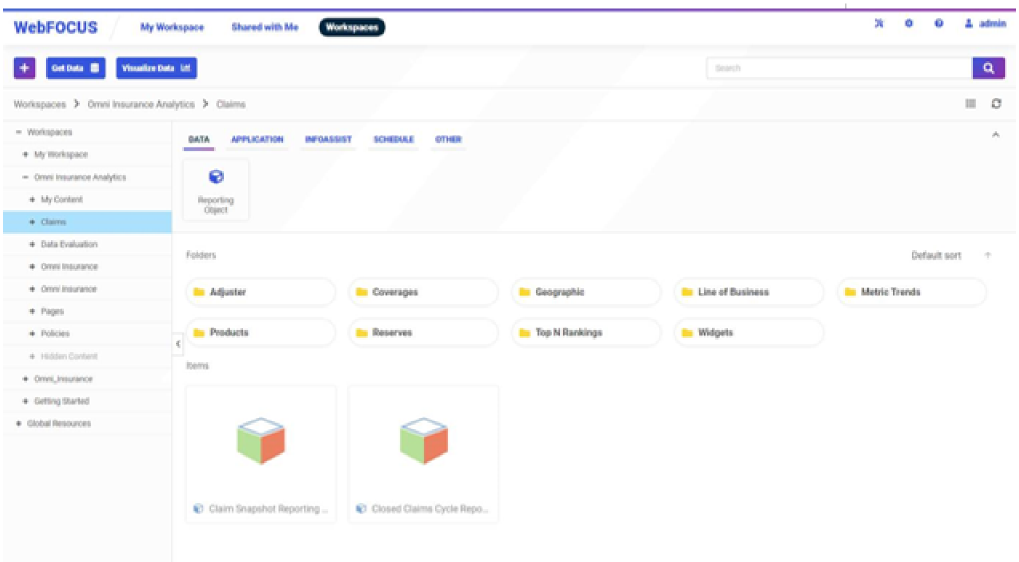
Procedure: How to Upgrade the Omni-Insurance WebFOCUS Change Management Package

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.

Legal and Third-Party Notices

This software may be available on multiple operating systems. However, not all operating system platforms for a specific software version are released at the same time. See the readme file for the availability of this software version on a specific operating system platform.