Recommendation Guide for Upgrading Interaction Server 8.5.* to 9.0.*

⚠ This guide is a recommendation only. Customers can perform the upgrade in any steps if the result of each step is supported.

Recommendations on upgrading Interaction Server 8.5.* to 9.0.*.

The update process is comprised of two phases.

1. If your integration uses Interaction Server in DB Server mode: first upgrade to the latest Interaction Server version supporting DB Server (v8.5.201.13), then switch to ODBC. If your integration already uses ODBC, go directly to step 2.
2. Upgrade to latest OS, DB and Interaction Server, as described in phase 2.

Phase 1: Migrating from DB Server to ODBC

This step is applicable only if DB Server mode is in use.

Interaction Server supports ODBC mode starting with version 8.5.3. Interaction Server 8.5.201.13 is the latest version supporting DB Server. If the current version of Interaction Server is lower than 8.5.201.13, begin with updating Interaction Server to version 8.5.201.13 and configure it to use ODBC.

⚠ The following Database versions are not supported for production usage with Interaction Server 8.5.201.13 but can be used in migration process ONLY:

- MS SQL Server 2008
- MS SQL Server 2012
- Oracle 11g

⚠ Please note that Interaction Server v8.5.201.13 does not support all operating systems. For example, it is not possible to jump from RHEL6 to RHEL8. Please refer to the Supported Operating Environment System Guide which documents the Interaction Server, OS and Database version compatibility.

Interaction Server v8.5.201.13 and ODBC Upgrade Procedure:

- Install version 8.5.201.13 on supported operating system, in DB Server mode:
    - Follow instructions in the **Upgrade notes** sections of Release Notes. Consistently perform all required steps not only for target versions, but also for all in-between versions, if any.
    - Perform sanity testing.
- Switch to ODBC mode:
    - Migrating to ODBC from DB Server is described in a separate [guide](#).
    - Perform sanity testing to ensure proper ODBC configuration.

⚠ It is not recommended to perform load or full validation test as there are many ODBC improvements/fixes after 8.5.201.13. Genesys will only accept/fix ODBC related bugs reproducible with the latest Interaction Server version.

Phase 2: Upgrading to latest OS, DB and Interaction Server

⚠ Even if Interaction Server is installed on OS supported by the latest version, it is recommended to migrate to a latest supported operating system version.

⚠ Database data migration process is out of the scope of this document.

This section describes the steps required to upgrade to the latest version of Interaction Server.

1. Install the **latest** Interaction Server on a supported OS (latest supported OS version is recommended).
   a. Follow instructions in the **Upgrade notes** sections of Release Notes. Consistently perform all required steps not only for target versions, but also for all in-between versions, if any.
2. If necessary, migrate to a database version supported by the latest Interaction Server version.
3. If Interaction Server Proxy is used, install the **latest** version on a supported operating system. The latest supported operating system version is recommended.
   a. Follow instructions in the **Upgrade notes** sections of Release Notes. Consistently perform all required steps not only for target versions, but also for all in-between versions, if any.
4. Perform full testing.

Sample upgrade scenarios

⚠ These data below are only samples clarifying approach above. Customers can perform the upgrade in any steps if the result of each step is supported. If desired, one can perform single step upgrade to the latest Interaction Server on a supported OS on a supported DB in ODBC mode.

1. Baseline: Interaction Server 8.5.0 on RHEL 5 with Oracle 11g in DB Server mode
   - Step 1:
     Install Interaction Server v8.5.201.13 on RHEL 7,
     keep DB Server on current machine with Oracle 11g DB Server,
     perform sanity test with DB -> you know that Interaction Server works ok on this OS.
   - Step 2:
     Switch to ODBC with Oracle 11g (it is not supported in production but use of Oracle 11g for migration purposes is acceptable),
     perform minimum sanity test -> you know that ODBC is configured properly.
   - Step 3:
     Install latest Interaction Server version on RHEL 8,
     migrate DB to Oracle 19c,
     perform full testing.

2. Baseline: Interaction Server 8.5.0 on Windows Server 2008 with MS SQL Server 2008 in DB Server mode
   - Step 1:
     Install Interaction Server version 8.5.201.13 on Windows Server 2016,
     keep DB Server on current machine with MS SQL Server 2008 in DB Server mode,
     sanity test with DB -> you know that IXN works ok on this OS.
   - Step 2:
     Switch to ODBC mode with MS SQL Server 2008 (it is not supported in production but use of MS SQL Server 2008 for migration purposes is acceptable),
     perform minimum sanity test -> you know that ODBC is configured properly.
   - Step 3:
     Install latest IXN on Windows Server 2019,
     Migrate DB to MS SQL Server 2019,
     Maintain ODBC mode,
     Perform full testing.
3. Baseline: IXN 8.5.100.18+ on RHEL 6 with Oracle 12c R1 in ODBC mode
   - Step 1:
     Install latest IXN on RHEL 8,
     Migrate DB to Oracle 19c,
     Maintain ODBC mode,
     Perform full testing.