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Genesys 8.5

Performance Management Advisors Migration Guide

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Performance Management Advisors Migration

This chapter provides information for migration to Performance Management Advisors releases 8.0 and later. Up to, and including, release 3.3, this solution was known as Informiam.

This chapter contains the following sections:

Overview

This chapter describes migration to release 8.x of the Advisor Suite from earlier releases, beginning with release 3.3. The Advisor Suite consists of the following products:

- Contact Center Advisor (CCAdv)
- Workforce Advisor (WA)
- Frontline Advisor (FA)
- Agent Advisor (AA)
- Advisors Genesys Adapter (AGA)
- Advisors Cisco Adapter (ACA)

You must install Advisors Platform (PLT) to use the Advisors products. For more information about required and optional components, see "Advisors Applications and Adapters".

Documentation Resources

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

- *Performance Management Advisors Deployment Guide* describes how to install and configure all Advisors components.

- *Performance Management Advisors Contact Center Advisor – Mobile Edition Deployment Guide* describes how to install and configure Contact Center Advisor – Mobile Edition (CCAdv-ME).

  Starting in release 8.1.5, there is no longer a standalone installation file for deploying CCAdv-ME; it is an option on the CCAdv installer. Information in the *Performance Management Advisors Contact Center Advisor – Mobile Edition Deployment Guide* was moved to the *Performance Management Advisors Deployment Guide*.

- *Performance Management Advisors Contact Center Advisor & Workforce Advisor Administrator User's Guide* describes how to perform administration functions for Contact Center Advisor and Workforce Advisor.

- *Performance Management Advisors Frontline Advisor Administration User's Guide* describes how to perform administration functions for Frontline Advisor.

- *Performance Management Advisors Cisco Adapter Release Note* provides release-specific information about new features, as well as corrections, modifications, known issues, and recommendations for your Advisors Cisco Adapter software.

- *Performance Management Advisors Platform Release Note* provides release-specific information about new features, as well as corrections, modifications, known issues, and recommendations for your Advisors Platform software.

- *Performance Management Advisors Contact Center Advisor & Workforce Advisor Release Note* provides release-specific information about new features, as well as corrections, modifications, known issues, and recommendations for your CCAdv/WA software.

- *Performance Management Advisors Frontline Advisor & Agent Advisor Release Note* provides release-specific information about new features, as well as corrections, modifications, known issues, and recommendations for your FA/AA software.

- *Performance Management Advisors Genesys Adapter Release Note* provides release-specific information about new features, as well as corrections, modifications, known issues, and recommendations for your Advisors Genesys Adapter software.

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- *Performance Management Advisors Contact Center Advisor - Mobile Edition Release Note* provides release-specific information about new features, as well as corrections, modifications, known issues, and recommendations for your Contact Center Advisor – Mobile Edition software. Also see client-specific Release Notes for CCAdv-ME:
  - *Performance Management Advisors Contact Center Advisor - Mobile Edition Android Client Release Note*
  - *Performance Management Advisors Contact Center Advisor - Mobile Edition Blackberry Client Release Note*
  - *Performance Management Advisors Contact Center Advisor - Mobile Edition iOS Client Release Note*
- *Performance Management Advisors Platform Release Advisory* provides important information that applies to the Advisors Platform.
- *Performance Management Advisors Cisco Adapter Release Advisory* provides important information that applies to the Cisco Adapter product.
- *Performance Management Advisors Genesys Adapter Release Advisory* provides important information that applies to the Genesys Adapter product.
- *Performance Management Advisors Frontline Advisor & Agent Advisor Release Advisory* provides important information that applies to the Frontline Advisor/Agent Advisor product.
- *Performance Management Advisors Contact Center Advisor and Workforce Advisor Release Advisory* provides important information that applies to the Contact Center Advisor/Workforce Advisor product.
- *Performance Management Advisors Contact Center Advisor - Mobile Edition Release Advisory* provides important information that applies to the Contact Center Advisor - Mobile Edition product.

Preparing for Migration

Note: Genesys strongly recommends that anyone considering migration of the Performance Management Advisors should engage Genesys Professional Services for the task.

- Ensure you have a backup of your current Advisor Suite and all associated configuration before migration.
- Review "Important Migration Information" for information about utilities that may be required to migrate your Advisor Suite.
- Read "Migration" to ensure that you are fully prepared to perform all the steps.

- Review "Overview of General Changes in the Advisor Suite by Release" for information about new or changed components. For complete information about components, see the *Genesys Performance Management Advisors Deployment Guide* for the release to which you are migrating.

- Review the Release Notes for information about known issues, recommendations, and corrections and modifications for the release to which you are migrating.

- Review the Release Advisories, if applicable, for the release to which you are migrating.

Supporting Software Components

Advisors components and all related components (Stat Server, Configuration Server) must be installed on the same network.

All physical servers used in a given Advisors installation must have their system clocks synchronized with a central time server.

Before commencing Advisors migration, ensure that the following external software is installed on the appropriate physical computer involved in Advisors operation:

- Java Development Kit (JDK)

- Apache HTTP Server

  If the Apache server is installed on the same machine as Advisors Platform, the Apache server must use a port other than 8080 (which is used by Advisors Platform). In most cases, Apache can use port 80.

- One of:
  - Microsoft SQL Server
  - Oracle (applicable to Releases 8.1 and later)

- If using Oracle, the appropriate Oracle JDBC driver is also required. You can obtain the driver from the Oracle Web site (`www.oracle.com`).

For information about specific versions of the preceding software components that are compatible with the Advisors release to which you are migrating, see the *Genesys Supported Operating Environment Reference Guide*.

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Advisors Applications and Adapters

The following Table shows which Advisor Adapter to install with Advisor applications.

Table 1: Adapter Deployment Requirements

Advisor Application	Data Source		
	Cisco	**Genesys**	**Mixed (Cisco and Genesys)**
Contact Center Advisor	No Adapter required	Advisors Genesys Adapter	Advisors Genesys Adapter
Frontline Advisor	Advisors Cisco Adapter	Advisors Genesys Adapter	Advisors Cisco Adapter for the Cisco data source and Advisors Genesys Adapter for the Genesys data source
Contact Center Advisor and Frontline Advisor	Advisors Cisco Adapter	Advisors Genesys Adapter for CCAdv and Advisors Genesys Adapter for FA	Advisors Genesys Adapter for CCAdv (CCAdv does not require an adapter when installed with Cisco data sources). Advisors Genesys Adapter for FA for the Genesys data source and Advisors Cisco Adapter for FA for the Cisco data source. **NOTE:** AGA serving both FA and CCAdv/WA from one system is not recommended for performance reasons.

Contact Center Advisor – Mobile Edition

Before commencing migration, ensure that the following software is installed on the appropriate physical computer:

- Windows Server or Red Hat Enterprise Linux
- Microsoft SQL Server or Oracle
- Java JDK
- Apache or Apache SSL Secure Web Server

- Advisors Platform
- Contact Center Advisor

Not all releases of CCAdv/ME support all of the preceding software. For compatibility and supported versions of the preceding software, see the *Performance Management Advisors Contact Center Advisor – Mobile Edition Deployment Guide*, or – starting in Release 8.1.5 – the *Performance Management Advisors Deployment Guide*, and the *Genesys Supported Operating Environment Reference Guide*.

Overview of General Changes in the Advisor Suite by Release

This section summarizes the significant enhancements in the Advisor Suite for each release. For detailed information about the Advisors features and functionality in each release, see the Performance Management Advisors documentation set (key documents are listed in "Documentation Resources").

Major enhancements in Advisor Suite functionality for Release 8.5.1

- The following Advisors modules are now integrated with the Solution Control Server:
  - Advisors Genesys Adapter
  - Advisors CISCO Adapter
  - Contact Center Advisor XML Generator
  - Workforce Advisor Server
  - Frontline Advisor with the rollup engine

  The Windows and Linux services that previously controlled the preceding components have been removed. For the preceding modules, Advisors supports warm standby high availability.

- You now execute dedicated database procedures against the Advisors Platform database to:
  - register or remove Stat Server instances
  - add, edit, or remove Stat Server configuration settings related to Advisors

  You can run the stored procedures whenever necessary. You perform Stat Server configuration adjustments *after* deployment – that is, after you have run the installers.

- The Source Metrics manager shows Interaction-related actions, available in the `Main Mask` and `Relative Mask` drop-down menus when you create a new source metric.

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- Advisors alert and action management features can accumulate obsolete historical alert and action management report data that the Advisors application never removes automatically. A maintenance procedure is added to the Platform database that can remove the obsolete data based on configurable criteria. A database administrator can schedule a job or execute the procedure manually to periodically delete CCAdv and WA expired alerts, archived FA threshold violations, or purge key action reports that are associated with expired alerts.

- Custom historical chat and email agent group metrics that use the `Short`, `Medium`, or `Long` time profile group, and which you enable, are available in the Column Chooser for display on the Contact Center Advisor dashboard. Previously, CCAdv could display only `Short` email and chat agent group report metrics on the dashboard.

- In Frontline Advisor, updates to the hierarchy are now dynamic. The Frontline Advisor hierarchy is monitored in real time, with structural changes being reflected almost immediately in the dashboards rather than requiring a 24-hour refresh cycle or a manual hierarchy reload.

- Frontline Advisor and Agent Advisor include an Agent Skills metric. Agent Skills is an agent state metric; it is a default raw report metric with no corresponding source metric. The Agent Skills metric provides the list of configured skills for each agent and the skill levels. Use the `Skill` filter at the top of the `Team` pane in the supervisor dashboard to filter the list of agents by agent skill.

  To support the Agent Skills metric, you must manually add a new business attribute value to the Frontline Advisor metrics list in the Configuration Server:

  `FrontlineAdvisor.Agent.All.AgentSkills`

- Installer screens related to database connection have been changed. The `Basic` connection properties for Oracle no longer include SID. Instead, the Oracle service name must be provided. For more flexibility, an `Advanced` connectivity option is available for both MSSQL and Oracle that allows adding a custom connection string previously prepared in a text file.

- Advisors dashboards support the following browsers:
  - Mozilla Firefox 24.x
  - Microsoft Internet Explorer 10
  - Microsoft Internet Explorer 11
  - Google Chrome 35

  Dashboards are available in English, French, or German.

- Support for Genesys intelligent Workload Distribution (iWD) metrics. The supported metrics do not include iWD datamart metrics.

- Advisors now include support for:
  - Microsoft SQL Server Cluster
  - Microsoft SQL Server 2012
  - Oracle 12c databases

Major enhancements in Advisor Suite functionality for Release 8.5.0

- The Performance Management Advisors (PMA) browser has been removed and replaced with a new thin-client user interface (supported on Firefox v.24.x+) that provides a single landing page for all Advisors. You can open each module in a separate browser tab. Always check the *Genesys Supported Operating Environment Reference Guide* for information about supported browsers and browser versions for each Advisors release.

- You can have two separate deployments of Advisors on the same machine, each with their own independent configuration and their own databases. The port numbers that Advisors modules use to communicate, previously hard-coded, are now exposed in properties files. The Platform installer now accepts and sets configurable port values for Geronimo. See the *Performance Management Advisors Deployment Guide* for details.

- In the Administration module, Metric Manager has been improved:
  - The **Source Metrics** page provides a user interface for maintaining statistic-type definitions from Stat Server. You can create custom source metrics for Agents, GroupAgents, Queue, and CallingList objects.
  - The **Report Metrics** page enables you to create custom Contact Center Advisor (CCAdv) agent group metrics and Frontline Advisor agent metrics. In release 8.5.0, you cannot create custom metrics for Workforce Advisor (WA).

- You can reduce the volume of statistics collected, and potentially reduce the number of Stat Servers used, by grouping raw report metrics and configuring metric applicability for source objects in the Configuration Server.

- Advisors Platform now supports a backup Configuration Server.

- The Frontline Advisor Oracle schema/MS SQL database has been removed from the installation.
  Frontline Advisor data has been moved to the Advisors Platform Oracle schema/MS SQL database.

- You can define metric display names and descriptions in English or German in the Metric Manager. Those names and descriptions are then displayed in the Advisors applications when you choose one of those languages on login.

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- Advisors Genesys Adapter supports the Outbound Contact Campaign Calling List object.

- Performance Management Advisors components supported connection to Oracle Real Application Clusters (RAC) starting in release 8.1.4. Advisors now fully support RAC functionality such as High Availability and failover, as well.

- Starting in release 8.5.001, the following features are also available:
  - You can create custom agent group report metrics using capacity rules. Capacity rules define an agent's ability to handle multiple, simultaneous interactions of differing media types on both single-media and multimedia DNs. These custom report metrics can track:
    - maximum interactions
    - routable interactions
    - current interactions
  - You can configure the prefix to be used as part of the internal short name for custom report metrics. Previously, Advisors created an auto-generated short name that used the CM prefix, which you could not change.
  - In the Metric Manager, you can search by metric name or description in German, as well as English, regardless of the language option you selected at login.
  - You can place point-in-time metrics in a time profile group: Short, Medium, or Long. Previously, point-in-time metrics were displayed on the dashboard independently from the time profile group selection.
  - You can enable or disable FA report metrics by time profile using the Report Metrics manager. You continue to use the FA time profile configuration field in the FA administration **Settings** tab to configure the time profile durations, as well as to disable a time profile at the FA module level.
  - You can configure whether or not the Time in Reason code part of the Reason code metric displays on the dashboard.
  - The *Performance Management Advisors Deployment Guide* includes information about how to use Advisors in a Cold Standby mode of operation. Cold Standby is a form of High Availability.

- Performance Management Advisors release 8.5 supports the following versions of Genesys Management Framework and Stat Server:
  - Release 8.5.000 supports Genesys Management Framework up to, and including, release 8.1.3.
  - Release 8.5.001 supports Genesys Management Framework up to, and including, release 8.5.

- Performance Management Advisors support the following:
  - Release 8.5.000 supports Stat Server up to, and including, version 8.1.2. Advisors release 8.5.001 adds support for Stat Server version 8.5.

- Genesys Workforce Management 8.1.2
- Java SE Development Kit 7
- Red Hat Enterprise Linux 6.0 64-bit native
- Windows 8 64-bit Native
- Windows Server 2012 64-bit native
- Apache 2.4

Major enhancements in Advisor Suite functionality for Release 8.1.5

- Starting in Release 8.1.5, permissions for user accounts are loaded when users log in to the Advisors browser. This affects the availability of objects in the browser:
  - In general practice, if a user is logged in to the Advisors browser, and a new object is added to Genesys Configuration Server, it is not added to the user's view until that user logs out and logs in again (if the user has the necessary security permission to view the object). The reverse is also true: when a user's access to an object is removed while that user is logged in, access to the object is not revoked until the user logs out and logs in again.
  - To see objects that were activated or removed in Advisors after the user logged in, that user must log out and log in again.

- Performance Management Advisors format numbers that display on the dashboard modules based on the language you selected in the Advisors browser, regardless of the system setting for Locale on the server. For example, if you log in to the German-language Advisors browser, but the system setting for Locale on the server is English, the numbers on your Advisors dashboard are formatted in the German style. Prior to Release 8.1.5, the number format depended on the Locale setting on the server.

- The following general changes have been made to the navigation pane in the Administration module:
  - The Frontline Advisor Administration component is embedded in the Advisors Administration component, consolidating administration of CCAdv, WA, and FA within one Administration module in the Advisors browser. To access the Frontline Advisor page in the Administration module, you must have access permissions to both Frontline Advisor Administration (`FrontlineAdvisor.Administration.canView`) and Advisors Administration (`AdvisorsAdministration.canView`).
  - The Object Configuration page in the Administration module is now the Base Object Configuration page, and is no longer included in the Genesys Adapters section of the navigation pane.
  - The Manage Adapters page is read-only.

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- The navigation link to the Agent Group Configuration page is moved below the links to the Application and Contact Group Configuration pages.
- The layout and content of the Agent Group Configuration and Contact Group Configuration pages have been updated; the contact center column and the contact center drop-down list now show the network contact center (NCC) name with the agent group contact center (AGCC) name, and uses the format NCC:AGCC.

- Performance Management Advisors support Genesys Management Framework up to, and including, Release 8.1.3.

- An additional configuration mode is added to Contact Center Advisor (CCAdv) / Workforce Advisor (WA), which enables you to implement WA configuration that does not depend on the existence of CCAdv configuration or CCAdv object mappings. The Administration System Configuration page contains a new option for CCAdv/WA configuration mode, which you can set as follows:
  - **yes**: for Integrated CCAdv/WA Configuration mode
  - **no**: for Independent CCAdv/WA Configuration mode

  If Independent Configuration mode is selected, you can now directly map agent groups to contact groups mapped to Network Contact Centers on the Contact Group-Agent Group tab of the Contact Group Configuration page.

  If Independent Configuration mode is selected, a contact group can be associated with an application that is not mapped to any contact center, application group, region, or operating unit. The application inherits those properties from the contact group associated with it.

  If Independent Configuration mode is selected, a contact group can be associated with an agent group that is not mapped to any application. The agent group inherits contact center and application group properties from the contact group associated with it.

- You can now map an agent group to multiple contact groups.

- New bulk configuration tools are provided for CCAdv and WA, which enable you to configure applications, contact groups and their relationships to agent groups outside the Administration module. An additional configuration export/diagnostics tool is also provided. The new tools are found in the installation package, in folders `\sql\mssql\bulkconfig` and `\sql\oracle\bulkconfig`.

- CCAdv/WA now support interaction with Data Manager. Metadata previously stored in the Advisors Genesys Adapter configuration database is now found in the Platform database and Configuration Server.

- The Alerts window was previously called the Alerts pane or panel. You can open the Alerts window from the Map pane as you always did. The Alerts window has been re-designed in Release 8.1.5, and includes the following changes:
  - You can scroll through the alerts of each contact center automatically or manually.
  - Inactive alerts display for a few seconds before they are removed from the Alerts window.
  - The Alerts window now displays the difference between the last refresh of the metric value and the current metric value, as well as the percentage of the absolute difference.
  - An expanded Alert cell in the Alerts window displays a spark line to indicate the history of the alert since the Alerts window was opened. Red or yellow spark line bars indicate the values that triggered a threshold alert.
- CCAdv and WA metric graphing changes:
  - The time slider attributes are maintained when you log out and log in again.
  - The five default colors used in the graph are more easily distinguished from one another; the color values have greater contrast.
  - If metrics are not defined for an object, they are not available to graph.
  - You can graph multiple time profiles for a metric simultaneously.
- Role-based access control (RBAC) extends to the Alert Management Reports window and the Alert Management tab. You can view action reports only if you have permission to see the aggregating objects and metrics of the alerts to which the reports are related.
- Workforce Advisor is horizontally scalable. The WA server can be deployed on one node, and more than one instance of the WA web services can be deployed on other nodes in the same cluster of Advisors. This permits a larger number of simultaneous users of WA.
- CCAdv supports 1500 concurrent users per installation and WA supports 1500 concurrent users per installation.
- During component upgrades, installation packages preserve the configured `Warehoused.metrics.max.minutes.kept` value.
- Frontline Advisor (FA) can operate in a distributed, or clustered, mode. In distributed mode, all FA instances share the Platform database and FA database. Only one FA instance, the FA engine, performs metric aggregation. The other FA instances, which provide FA web services, retrieve dashboard data and metrics from the FA engine. Together, the FA web instances provide the presentation layer.

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- The following performance enhancements have been made to Frontline Advisor:
  - Frontline Advisor now supports 1500 concurrent users with a maximum dashboard age of 30 seconds for State metrics, 95% of the time, and a maximum dashboard age of 2 minutes for Performance and Rule metrics, 95% of the time.
  - Frontline Advisor now performs metric rollups in memory. Previously, FA performed the metric rollups through database stored procedures.
- Metadata previously stored in the Advisors Genesys Adapter database related to Data Manager functionality is now found in Advisors Platform and Genesys Configuration Server. The configuration database for Genesys Adapter is no longer required and has been removed. If you are upgrading to Release 8.1.5, you use the Advisors Object Migration Wizard to migrate data from the Genesys Adapter configuration database to Advisors Platform and Configuration Server. Changes related to this new functionality include the following:
  - Changes in the type of files supplied in the installation package.
  - Updates to the installation screens used to deploy AGA.
  - Introduction of a new user account (the Object Configuration User account), which you configure in Configuration Manager.
- Advisors Genesys Adapter supports Genesys Platform Software Development Kit (PSDK) to Release 8.1.2.
- Performance Management Advisors support encryption of Advisors Genesys Adapter metrics database data.
- Genesys Cisco Adapter can connect to Oracle Real Application Clusters (RAC). RAC functions such as High Availability and failover are not supported. Other Advisors components supported connection to RAC servers in Advisors release 8.1.4; see "Major enhancements in Advisor Suite functionality for Release 8.1.4" on for additional information.

Major enhancements in Advisor Suite functionality for Release 8.1.4

- New performance metrics added to Frontline Advisor:
  - Thirteen new source metrics added to the metrics configuration table (metric IDs ranging from 500 to 512 inclusive).
  - New source and computed performance metrics, including metrics that are disabled until you configure an associated filter for each (available in stored procedures in the FA database).
  - Advisors Platform, Advisors Genesys Adapter, Contact Center Advisor/Workforce Advisor, and Frontline Advisor can connect to Oracle Real Application Clusters (RAC). Advisors Cisco Adapter

supports connection to RAC servers starting in Advisors release 8.1.5; see "Major enhancements in Advisor Suite functionality for Release 8.1.5" on for additional information.

- Starting in Release 81401:
  - French is added as an option for language and country settings. English and German continue to be options.
  - Performance Management Advisors are compatible with Oracle Java 1.7.
  - Performance Management Advisors can use a Transport Layer Security (TLS) connection to Genesys Configuration Server.

Major enhancements in Advisor Suite functionality for Release 8.1.3

- A Metric Manager page is added to the Administration module. Metric Manager replaces the Metrics page. All CCAdv/WA metrics can be viewed in the Metric Manager, and the display attributes for all metrics can be updated. In Release 8.1.3, you can create custom application metrics using existing source metrics provided by Advisors Genesys Adapter and existing application metrics (you cannot create agent group or contact group metrics).

- Use the Time Profile for Charting property in the Metric Manager to enable up to five metrics for graphing.

- The Metric Graphing window functionality has the following changes:
  - Access to the Metric Graphing window is now available as an option within the row in which you select an object or application for graphing. Previously, the button was only available above the Contact Centers and the Applications panes.
  - You can access the Metric Graphing window from Workforce Advisor, which was previously unavailable.
  - You can graph WA forecast and real-time metrics.
  - Both Contact Center Advisor and Workforce Advisor metrics can be displayed within the same Metric Graphing window.
  - You select the graphing style within the Metric Graphing window.

- CCAdv and WA support JAWS Standard version 11, an accessibility interface for users with visual impairment. JAWS software provides audio and a series of keyboard shortcuts for navigating the tabulated information on the screen.

- Additional privileges are added for Role-Based Access Control within Contact Center Advisor, Workforce Advisor, and Frontline Advisor.

- The Genesys Adapter installer includes additional Stat Server configuration options. You can now specify the types of statistics supported on the Stat Server pair you are associating with a Genesys

Adapter instance. For example, you can choose to collect core statistics only on certain pairs of Stat Servers and third-party media statistics on other specific pairs.

- There is additional configuration in Configuration Manager to enable identification of NonVoiceOnly virtual queues. If you want only third-party media statistics to be requested on certain virtual queues, those virtual queues must be identified in the Configuration Server.

- The Show Totals and Averages Row for Agent Groups option on the System Configuration page of the Administration module now hides the Totals and Averages row in both the Contact Center Advisor and Workforce Advisor Agent Groups panes. Previously, it affected the Agent Groups pane in the Contact Center Advisor dashboard only.

- A Default Grouping section is added to the System Configuration page in the Administration Module. Use the drop-down lists to change the default grouping selection for the CCAdv and WA Contact Centers panes.

- Column Chooser for Frontline Advisor now has the appearance and functionality of the Contact Center Advisor Column Chooser. Agents also use Column Chooser, which replaces the Configure pane on Agent Advisor.

Major enhancements in Advisor Suite functionality for Release 8.1.2

- Removal of Administrative Partitioning (replaced by functionality in RBAC).

- Support for role-based access control (RBAC)—Access to business objects, hierarchies, and metrics is now controlled using roles and permissions that are created in Genesys Configuration Manager, and whose configuration is completed in the Advisors Administration module. RBAC replaces the Administrative Partitioning feature of the previous release.

- Further integration with Genesys Management Framework, including management of user profiles, functionality permissions, and creation of business objects.

- A new Advisors Migration wizard supports CCAdv/WA business objects and FA metrics migration.

- Improved internal support for Stat Server load balancing—The relationship between a statistic and the Stat Server pair against which it is requested is now maintained during refresh or restart of the Adapter. Statistics continue to be requested from the same Stat Server(s) after an Adapter refresh or restart as was used prior to the restart. Genesys Adapter no longer depends on the value set for the Stat Server old-stats-remove-interval option.

- When you install Frontline Advisors (FA), you can now specify a Persons folder in Configuration Manager to be the root for the FA hierarchy. If you specify a Persons folder as the root, the hierarchy is read and loaded from that Persons folder at FA (re)start and when you use the reload feature.

- The FA Manager Console supports features of JAWS Standard version 11, an accessibility interface for users with visual impairment. Keyboard shortcuts can be used in conjunction with screen reader accessibility software (JAWS) as an alternative to the standard browser navigation.

- The Data Manager feature is implemented in this release. The Data Manager feature provides support for multiple Genesys and Cisco Adapters and load balancing across multiple adapters using the same data source (in a single Genesys environment).

- Support for Genesys Stat Server 8.1.

- Support for logging of changes made in the Administration module.

- A threshold's direction is now established on a per-threshold basis, rather than on a per-metric basis.

- Support for multilingual templates for e-mail in German, English, or both languages.

- Full compatibility with Adobe Flash version 11.

- Support for Genesys PSDK 8.1.

- Updates to Contact Center Advisor – Mobile Edition make it compatible with Advisors Platform release 8.1.2 and with Contact Center Advisor/Workforce Advisor release 8.1.2.

Note: Contact Center Advisor-Mobile Edition Release 8.1.2 maintains the features and functionality of the 8.1.1 Mobile Edition product. CCAdv-ME does not include features introduced in Advisors Platform and Contact Center Advisor Release 8.1.2.

Major enhancements in Advisor Suite functionality for Release 8.1.1

- Administrative Partitioning—A partition is a means by which Advisors objects can be grouped into business areas for the purposes of administration.

- Significantly updated Administration user interface, which permits more flexible configuration.

- User authentication through the Configuration Server.

- Hierarchy management through the Configuration Server for Frontline Advisor.

- Metric Graphing enhancements for Contact Center Advisor.

- Additional time profiles for Frontline Advisor.
- Support for MS SQL 2008.
- Support for Oracle.
- Support for capacity rule metrics.
- Metric filtering (ability to add filters on a per-metric basis as distinct from a per-object basis).
- Additional agent group metrics.
- Implementation of Genesys system requirements.

Major enhancements in Advisor Suite functionality for Release 8.0

- UI enhancements in the CCAdv, WA, FA, and AA dashboards, including:
  - Updated Dashboards to match the Genesys look and feel.
  - Introduction of a new Alerts pane.
  - Redesign of the Column Chooser.
  - Simultaneous display of metrics from different time periods on the CCAdv and WA dashboards.
- Support for multimedia metrics (Web chat and e-mail) has been added.
- Custom metrics have been introduced, allowing the customer to configure certain sets of metrics based on their business needs.
- Users can now save their metric selections using the Metric Libraries functionality. This allows users to quickly switch between different views on the CCAdv and WA dashboards.

Major enhancements in Advisor Suite functionality for Release 3.3

- Support for virtual agent groups that utilize the logged-in script as part of the group definition.
- Normalization of metrics between CCAdv and WA.
- Introduction of Metric Graphing. This feature allows users to see trends in certain metrics over an extended period of time.
- Dashes are now displayed for metrics for a particular object where those metrics cannot be retrieved from the data source from which the object came.

Important Migration Information

- You must migrate Advisors database schemas incrementally. For example, you cannot migrate directly from release 8.0 to 8.1.2. To migrate from release 8.0 to 8.1.2, you would:

  a. Migrate from release 8.0 to release 8.1.0.

  b. Migrate from release 8.1.0 to release 8.1.1.

  c. Migrate from release 8.1.1 to release 8.1.2.

  Your installation package contains the migration scripts and tools you require. Run the migration scripts in sequential order. You must manually run each migration script; it is not automated. If you use Oracle databases, you must use SQLPlus. If you use Microsoft SQL Server, you can use Microsoft SQL Server Management Studio, or the application of your choice, to run the scripts.

  After you run a migration script, and if there are no errors, then start the next script, if more than one is required. Always check the Release Notes, and the migration Readme file included with your Installation Package, for any additional instructions about running the scripts for each release.

- Genesys does not recommend migrating any of the data sources at the time of Genesys Performance Management Advisors migration. If you need to migrate any of the data sources to a more recent release, do so either before you start or after you successfully complete the Advisors migration.

- Ensure you successfully complete the Genesys Performance Management Advisors migration of all components before configuring or enabling any new feature.

- Privileges associated with Role-Based Access Control for Advisors, introduced in Release 8.1.2, are not defined in any existing Advisors role in the Configuration Server settings. If you are migrating from Advisors Release 8.1.1, an administrative user must update existing roles, or create new roles, and add the privileges to allow the described access or activity.

- Beginning in Release 8.1.3, additional privileges for role-based access control are introduced. When migrating to Release 8.1.3, the new privileges are not defined in any existing Advisors role in the Configuration Server settings. After successful migration to Release 8.1.3, an administrative user must update existing roles or create new roles and add the privilege to allow the relevant access or activity.

- Beginning in Release 8.1.5, the AGA configuration database is not required because the data moves to Advisors Platform and Genesys Configuration Server. Ensure you understand the changes before migrating. See "Object Migration Wizard" on page 33 in this document, and review the Data Manager information in the *Performance Management Advisors Deployment Guide*.

- The FA database objects moved to the Platform database in Release 8.5.0. An option to transfer the FA database to the Platform database is included in the Object Migration Wizard in Release 8.5.0 to assist you with the transition. See "Migrating the Advisors Suite – 8.5 Releases" on page 26 and "Object Migration Wizard" on page 33 of this guide.

Migration

This section contains two migration procedures:

"Migrating the Advisors Suite – 8.1 Releases" on page 21

"Migrating the Advisors Suite – 8.5 Releases" on page 26

Read the procedure relevant to your migration before you begin to ensure that you are fully prepared to perform all the steps.

Procedure:
Migrating the Advisors Suite – 8.1 Releases

Start of procedure

1. Ensure that all the external prerequisites are in place (see "Supporting Software Components").

2. Upgrade your database software, if required.

3. Uninstall the previous version of each application from the server.

Note: The previous installation must be completely removed by deleting or renaming its installation directory.

Genesys recommends that you uninstall the Windows services for the Advisors CCAdv XML Generator and Advisors Suite Server (that is, the Platform Server) before you rename or delete the installation directory. Uninstalling the Windows services requires files that are in the installation directories you are going to delete or rename.

If the migration fails and you must roll back to the previous version, changing the directory name to the original name suffices.

---

4. Migrate the databases. In release 8.5.0, this includes deprecating schemas. In earlier releases, the Advisors suite required three schemas. Starting in release 8.5, the suite requires only two. As part of the database migration, you will remove the third schema's data. It is very important to migrate the databases in the order listed here.

Notes: • To migrate users held in the 3.3, 8.0, or 8.1.0 Advisors database to the Genesys Configuration Manager, run the User Migration Utility *before* migrating the Platform database. If you run the User Migration Utility to move users to the Configuration Manager as part of a general migration to Release 8.1.2, it is not necessary to run it again as part of a migration from Release 8.1.2 to Release 8.1.3. If you have new users, simply add them in Configuration Manager either before or after the successful migration to Release 8.1.3.

• To migrate configuration objects held in Advisors databases in releases prior to 8.1.2 to the Genesys Configuration Manager, run the Advisors Object Migration Wizard. Genesys recommends that you run the Object Migration Wizard to migrate metrics after executing the last FA migration database script.

---

a. Migrate the AGA metrics databases (not required for migration to release 8.1.5). The AGA metrics database must be migrated before any other.

Important Information for Release 8.1.5

Starting in Release 8.1.5, source metric definitions and statistics templates that were previously stored in the Advisors Genesys Adapter (AGA) database move to Advisors Platform tables. Configured objects and filters that were previously stored in the Advisors Genesys Adapter database move to Genesys Configuration Server.

If you are migrating from Advisors release 8.1.4 to release 8.1.5, you must use the release 8.1.5 metrics database creation script to recreate the AGA metrics schema (you do not run a migration script):

i. Delete the AGA metrics database(s):
— MSSQL:
   DROP DATABASE <metrics_database_name>
— ORACLE:
   DROP USER <metrics_database_user> CASCADE

ii. Recreate the AGA metrics database(s) using the 8.1.5 database schema script:
— MSSQL:
   gc_metrics_newdb_<version>.sql
— Oracle:
   gc_metrics_new_<version>_Schema.sql

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        iii. If you use Oracle, you must grant access privileges to the Platform database user account (the Advisors User account) to access the new AGA metrics database(s).

        iv. If the new AGA metrics database has a name different from the previous database, ensure you change the name in the LINKED_SERVER column of the Advisors Platform ICM_DATABASE table.

b. Migrate the Platform database.

If supplied in your installation package, the platform post-install script should not be executed immediately after you apply the migration script. If the migration script issues a recommendation to apply the post-install script, apply it after you have installed all components. See Step 9.

c. Migrate the AGA configuration databases (not required for migration to release 8.1.5).

Important Information for Release 8.1.5

The AGA configuration database is not required in Release 8.1.5 because the data moves to Advisors Platform and Genesys Configuration Server. However, you must maintain the AGA configuration database from previous releases until you complete all migration work for Release 8.1.5. After a successful upgrade to Release 8.1.5, you can delete the AGA configuration database.

d. Migrate the Frontline Advisor database if you use this product.

Note: Thresholds and rules that use overrides, and were configured prior to 8.1, cannot be migrated to 8.1.1. The FA database generates errors to the log file when using the 8.1 to 8.1.1 migration script to migrate the FA database. Before you run the 8.1 to 8.1.1 migration script for the FA database, execute the following queries to remove threshold and rule overrides and to allow creation of the indexes:
- DELETE FROM FA_Violations
- DELETE FROM FA_Thresholds WHERE IsGlobal = 0
- DELETE FROM FA_Rules WHERE IsGlobal = 0

Run the preceding queries immediately before running the migration script (fa-database-migration-8.1-to-8.1.1.sql).

---

e. Migrate the Advisors Cisco Adapter database if you use FA with a Cisco source.

f. Migrate the Metric Graphing database if you use CCAdv/WA.

The script for the Metric Graphing database is included in the CCAdv/WA installation package (IP). Unlike other Advisors components, there is no script for the Metric Graphing database that

includes the word "migration" or "migrate" in the filename; you use the Metric Graphing script that is included in the IP for both new installations and for migration.

5. Install the Platform service (Geronimo).

6. Install the core service for the Adapter(s) you have installed.

   If you are installing Release 8.1.5, migrate source metric definitions templates, statistics templates, and configured objects and filters from the AGA database to the Platform database and to Configuration Manager using the Advisors Object Migration Wizard *before* you install the AGA core service.

   To install an Adapter core service, run the installation jar file for the release to which you are migrating and ensure the option to install the service is selected as part of the server installation. For detailed information, see the *Performance Management Advisors Deployment Guide*.

7. Optionally, install Contact Center Advisor, Workforce Advisor, CCAdv XML Generator, Resource Management, and Frontline Advisor.

Notes: • Resource Management is not available in a Cisco-only configuration.
   • XML Generator is required only for Contact Center Advisor to function. XML Generator is not used in the WA application, although XML Generator must run at least one cycle immediately after you install it. This is necessary to generate a set of views used by CCAdv and WA to access metrics data sources.
   XML Generator also loads metadata during this cycle: names of switches, applications, agent groups, and the relationships among them, which are subsequently used in CCAdv and WA configuration.
   • If you install a new version of Contact Center Advisor in an environment that uses Contact Center Advisor – Mobile Edition, first uninstall Mobile Edition, install the new Contact Center Advisor software, and then re-install Mobile Edition software. Starting in Release 8.1.5, CCAdv–ME does not have a standalone installation file; it is an optional module included in the CCAdv installation file.

---

8. Make any additional configuration changes required.
   For example, if you changed memory allocations in your original Advisors installation, you must reconfigure those settings after migration. The settings revert to default values when you re-install the Advisors suite during a migration.
   For detailed information, see relevant component chapters in the

Performance Management Advisors Deployment Guide. If you use Contact Center Advisor – Mobile Edition with a release earlier than 8.1.5, see *Performance Management Advisors Contact Center Advisor – Mobile Edition Deployment Guide*.

Applying the Post-Installation Script for Release 8.1.5

9. Apply the post-install script, if required; apply the script only if the platform migration script issued such a recommendation. The purpose of the post-install script is to re-map existing object filters to the new filter IDs that are stored in the Genesys Configuration Server starting in release 8.1.5. To apply the post-install script, do the following:

    After you install CCAdv/WA and AGA for CCAdv components, start all related services and wait for a successful run of several cycles with AGA delivering data. Once this is complete, stop the services and apply the platform post-install script that is supplied in the installation package.

Release 8.1.5 Migration

10. After you have confirmed a successful upgrade to release 8.1.5, you can delete the AGA configuration database.

End of procedure

Procedure:
Migrating the Advisors Suite – 8.5 Releases

Prerequisites

- **Important Information for Migration to Release 8.5.100 in Oracle Environments:**
  For migration to release 8.5.1, you must grant the Platform user a privilege that allows that user to create materialized views if you did not use the supplied deployment scripts to create the user. You must grant the privilege to the 8.5.001 user *before* you apply the migration script.

- **Important Information for Migration to Release 8.5.100 in Microsoft SQL Server Environments:**
  - Starting with release 8.5.100, the oldest supported Microsoft SQL Server version is MSSQL Server 2008.
  - Complete the following steps in the order listed:
    - **i.** Prior to the Platform database content migration, you must move the Platform database to an MSSQL Server of a supported version.
    - **ii.** You must upgrade the Platform database to release 8.5.001 before you begin the upgrade to release 8.5.100.

Start of procedure

1. Ensure that all the external prerequisites are in place (see "Supporting Software Components").

2. Upgrade your database software, if required.

3. Uninstall the previous version of each application from the server.

Note: The previous installation must be completely removed by deleting or renaming its installation directory.

Genesys recommends that you uninstall the Windows services for the Advisors CCAdv XML Generator and Advisors Suite Server (that is, the Platform Server) before you rename or delete the installation directory. Uninstalling the Windows services requires files that are in the installation directories you are going to delete or rename.

If the migration fails and you must roll back to the previous version, changing the directory name to the original name suffices.

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4. Migrate the databases.

It is very important to migrate the databases in the order listed in the sub-steps following the Note.

Note: **Important Information for Migrations of 8.5.0 Installations in an Oracle Environment**

Before applying the 8.5.001 database migration script, check to see if any procedures have names starting with spMigrate. If such procedures exist, use the following script to remove them:

```
BEGIN
EXECUTE IMMEDIATE 'DROP PROCEDURE spMigrateCallCalcFA';
EXCEPTION WHEN OTHERS THEN NULL;
END;
/
BEGIN
EXECUTE IMMEDIATE 'DROP PROCEDURE spMigrateCallRaFA';
EXCEPTION WHEN OTHERS THEN NULL;
END;
/
BEGIN
EXECUTE IMMEDIATE 'DROP PROCEDURE spMigrateCustomMetricDirect';
EXCEPTION WHEN OTHERS THEN NULL;
END;
/
```

If the Platform 8.5.001 database migration script for Oracle issues errors on the first run, then you must re-apply the script.

---

   a. Migrate the AGA metrics databases. The AGA metrics database must be migrated before any other in *any* environment – Oracle or MSSQL.

Note: **Important Information for Release 8.5.000**

To migrate to release 8.5.000, you use scripts supplied by Genesys to remove old objects and then add new objects to the Advisors Genesys Adapter metrics database. Genesys provides two scripts for Oracle and one for MS SQL.

Migration of AGA Oracle METRICS Schema

   a. Connect as the METRICS user.

   b. Execute `gc_metrics_<version>_ObjectsDrop.sql`.

   c. Execute `gc_metrics_new_<version>_ObjectsPlus.sql`.

Migration of AGA MS SQL Databases

   a. Connect to the AGA metrics database.

   b. Execute `gc_metrics_newdb_<version>.sql`.

Note: **Important Information for Release 8.5.100**

Starting with release 8.5.1.00, it is no longer necessary to run `gc_metrics_<version>ObjectsDrop.sql` before running `gc_metrics_new<version>_ObjectsPlus.sql` when migrating the Advisors Genesys Adapter metrics database.

Migration of AGA Oracle METRICS Schema

   a. Connect as the METRICS user.

   b. Execute `gc_metrics_new_<version>_ObjectsPlus.sql`.

---

   c. Ensure you grant `Select` permissions for all AGA Metrics views to Advisors Platform.

   d. Make a backup of the Platform schema. Ensure that the backup can be successfully restored. Compare the restored and the original schema to ensure that they are identical.

   e. Migrate the Platform database. For detailed information about which scripts to run and when, see the `Readme-advisors-platform-migrate.txt` file included in your Installation Package.

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f. Migrate the Frontline Advisor database if you use this product in your enterprise.

> **Note:** **Important Information for Release 8.5.000**
>
> If you use Frontline Advisor in your enterprise, perform the following Steps in the order listed to migrate FA database content to the Platform database and to migrate FA metrics from release 8.1.5 to 8.5.0.
>
> 1. Run the Object Migration Wizard to transfer the 8.1.5 FA database content to the Platform database after you migrate the Platform database.
>
> 2. Manually remove the FA metrics business attribute values before using the Object Migration Wizard to migrate FA metrics data. In Configuration Manager, the values are under the default tenant. The path is `Business Attributes\Advisors Metrics\Attribute values\Frontline Advisor`.
>
> 3. Run the Object Migration Wizard to register the FA metrics in Genesys Configuration Server. The metrics transferred to the Platform database as part of Step 1, and removed from the Genesys Configuration Server in Step 2, need to be registered in Genesys Configuration Server for user access control.

g. Migrate the Advisors Cisco Adapter database if you use FA with a Cisco source.

h. Migrate the Metric Graphing database if you use CCAdv/WA.

The script for the Metric Graphing database is included in the CCAdv/WA installation package (IP). Starting in release 8.5.0, the script to migrate the Metric Graphing database includes the word "migrate" in the filename.

5. **Migration to Release 8.5.1 only**

New metrics were added to Advisors in release 8.5.1. Ensure you run the FA metrics and CCAdv/WA metrics options in the Object Migration Wizard to register these metrics in Genesys Configuration Server. See "Object Migration Wizard" on page 33 for information about using the wizard.

6. **Migration to Release 8.5.1 only**

Be aware that some Advisors components are controlled by the Genesys Solution Control Server (SCS) starting with release 8.5.1. Integration with the SCS means you must:

- Install the Local Control Agent (LCA) on each system that runs any of the components that integrate with SCS.

- Configure a Host in Configuration Manager or Genesys Administrator for each system that runs any of the components that integrate with SCS.
- Configure an Application in Configuration Manager or Genesys Administrator for each Advisors server that runs one or more of the components that integrate with SCS.

See the following pages in the *Genesys Performance Management Advisors Deployment Guide* for detailed information:

- Deployment Summary
- Prerequisites
- Deploying Components Controlled by Solution Control Server
- Integration with Solution Control Server and Warm Standby
- Applications, Advisors Servers, and Cluster Nodes

7. Install the Platform service (Geronimo).

8. Install the adapter(s).

For releases up to, but *not including* release 8.5.1, also install the Windows service for the Adapter(s) you have installed. Starting with release 8.5.1, the adapters are controlled by the Genesys Solution Control Server and the Windows service is no longer required.

To install an Adapter core service, run the installation jar file for the release to which you are migrating and ensure the option to install the service is selected as part of the server installation. For detailed information, see the *Performance Management Advisors Deployment Guide*.

Note: **Important Information for Migration to Release 8.5.1**

Starting in release 8.5.1, Stat Server registration is no longer done during deployment. Previously, you input Stat Server connection information in installer screens, which registered the Stat Servers. In release 8.5.1 and later, you execute dedicated database procedures against the Advisors Platform database to:

- register or remove Stat Server instances
- add, edit, or remove Stat Server configuration settings related to Advisors

After you install Advisors Genesys Adapter, you must run the stored procedure to register the Stat Servers and associate Stat Servers with adapters. See the *Performance Management Advisors Deployment Guide* for information.

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9. Optionally, install Contact Center Advisor, Workforce Advisor, CCAdv XML Generator, Resource Management, and Frontline Advisor.

The order in which you install the preceding Advisors components is not important. However, you must plan the installation and be ready to specify XML Generator application names when prompted by installers. Specify

the application names in the Applications section of Genesys Administrator before deployment. The application names you provide in installers must exactly match the names specified in Configuration Server. See the `Prerequisites` and the `deployment procedures` in the *Performance Management Advisors Deployment Guide* for detailed information.

Notes: • Resource Management is not available in a Cisco-only configuration.

• XML Generator is required for Contact Center Advisor to function. XML Generator is not used in the WA application, although XML Generator must run at least one cycle immediately after you install it. This is necessary to generate a set of views used by CCAdv and WA to access metrics data sources.
XML Generator also loads metadata during this cycle: names of switches, applications, agent groups, and the relationships among them, which are subsequently used in CCAdv and WA configuration.

• If you install a new version of Contact Center Advisor in an environment that uses Contact Center Advisor – Mobile Edition, first uninstall Mobile Edition, install the new Contact Center Advisor software, and then re-install Mobile Edition software. CCAdv–ME is an optional module included in the CCAdv installation file.

---

10. Make any additional configuration changes required.
For example, if you changed memory allocations in your original Advisors installation, you must reconfigure those settings after migration. The settings revert to default values when you re-install the Advisors suite during a migration.
For detailed information, see relevant component chapters in the *Performance Management Advisors Deployment Guide*.

End of procedure

Next Steps

Genesys recommends that you review the metric counts and make sure that your existing Stat Server configuration continues to correspond to the expected load.

See the *Performance Management Advisors* chapter in the *Genesys Hardware Sizing Guide* for information about estimating the number of requested statistics for Frontline Advisor.

Advisors Migration Utilities

There are two Advisors migration utilities:

- User Migration Utility – For migration from Advisors 3.3, 8.0, 8.1.0 to 8.1.1. See "User Migration Utility" on page 32.

- Object Migration Wizard – For migration from Advisors 8.1.1 to 8.1.2 and higher. See "Object Migration Wizard" on page 33.

When to run the migration utilities
In general, you run the migration utilities, as required, after you have migrated your databases. If there are specific requirements for use of the migration utilities, those requirements are included in the migration procedures in this chapter (see "Migrating the Advisors Suite – 8.1 Releases" on page 21 and "Migrating the Advisors Suite – 8.5 Releases" on page 26).

The User Migration Utility is used only when moving to release 8.1.1; the utility moves the Advisors users from the Advisors Platform database to the Genesys Configuration Server.

The Advisors Object Migration wizard can migrate objects and metrics; you choose options in the wizard to migrate objects of your choice. You use the Object Migration wizard only when migrating to release 8.1.2 or later. The options available to you in the wizard differ by release; the data that the wizard can move from Advisors Platform to Configuration Server is release-dependent.

User Migration Utility

Starting in Advisors release 8.1.1, user configuration functionality moves to the Genesys Configuration Manager.

The User Migration Utility is packaged with the Advisors Platform distribution starting in release 8.1.2. The utility allows migration of Advisors users from the 3.3, 8.0, or 8.1.0 Advisors Platform database to Genesys Configuration Manager.

The migration tool migrates user and contact records along with user's module access information from the 3.3, 8.0, or 8.1.0 Advisors Platform database to Configuration Manager.

Specifically the following user information is migrated:

- User name
- Password
- First name
- Last name
- Email
- Employee ID
- Whether the user is an agent or not

- User's module access information
- User's role information

The utility contains a `ReadMe.txt` that summarizes the use of the tool and the procedure to run the tool.

Procedure:
Running the User Migration Utility

Purpose: To migrate users held in the 3.3, 8.0, or 8.1.0 Advisors database to the Genesys Configuration Server.

Prerequisites

- Before you run the user migration utility, ensure you have a supported version of Java installed and `JAVA_HOME` is added to system classpath.
- The supplied Configuration Manager user must have Read, Create and Change permissions on the selected tenant.

Start of procedure

1. Extract the `user-migration-util-<version>.zip` file from the `advisors-platform-distribution-<version>.zip/ip/supplement` folder.

2. Go to the `conf` folder in the extracted directory and edit `migration.properties`. Follow the configuration comments in the file and enter the configuration values. Save the file.

3. Open the command prompt and change to the directory where the `migration.bat` file is extracted.

4. Run the following command on the command prompt:
   `migration.bat`

5. When the migration is complete, review the log for errors or warnings.

End of procedure

Object Migration Wizard

With the introduction of role-based access control (RBAC), beginning in release 8.1.2 (see the *Performance Management Advisors Contact Center*

Advisor/Workforce Advisor Administrator User's Guide), many configuration objects moved to the Genesys Configuration Server.

Note: Be aware of any new privileges added to Advisors after release 8.1.2. Those new privileges have never been defined in any existing Advisors role in the Configuration Server; they cannot be migrated using a migration utility. To use new privileges added to Advisors after release 8.1.2, an administrative user must update existing roles or create new roles and add the privilege to allow the described access or activity.

In release 8.1.2 and later, many of the objects you use to configure the Advisors modules exist in Genesys Configuration Server. That is, what you see in Genesys Configuration Server is what you have to build your Advisors configuration. You use the Advisors Object Migration Wizard to automate the migration of objects from databases to Configuration Server. Any object you will require in your configuration must be either migrated from an earlier release using the Object Migration Wizard, or you must manually create the objects in Configuration Manager.

You can select only one option at a time for migration, but you can run the migration tool as many times as required to migrate all objects and metrics.

The Advisors Object Migration Wizard is packaged with the Advisors Platform distribution.

Migration Paths

In general, migration of CCAdv/WA metrics data is a required step of your Contact Center Advisor/Workforce Advisor migration, but migration of other CCAdv/WA objects is optional. If you use Frontline Advisor, migration of FA metrics data is a required step. See below for additional release-specific information.

All releases   The following migration options are provided by the installer for all Advisors releases that use the Object Migration Wizard:

- Migrating the Frontline Advisors metrics data – The FA migration path involves exporting the FA metrics from the FA database to the Configuration Server. Only those FA metrics that are not present in Configuration Server are migrated.

- Migrating the Contact Center Advisor/Workforce Advisor data – The CCAdv/WA option migrates the following:
  - Metrics for both CCAdv and WA.
  - Metadata records of contact centers, application groups, and regions (geographic, reporting, and operating units).
  - User permission records for contact centers and application groups.

◆   Module access privileges of the existing users. Although this option is placed under CCAdv/WA migration path, it migrates the module privileges for all the Advisors components.

Release 8.1.5   Starting in Release 8.1.5, the AGA configuration database is not required. The AGA configuration database data moves to Advisors Platform and Genesys Configuration Server. To transfer the data correctly, the Object Migration Wizard includes a `Genesys Adapter Configuration Migration` option that moves:

- AGA source metric definitions and statistics templates to the Platform database
- configured objects and filters to the Configuration Server.

For detailed information about this option and the removal of the AGA configuration database (advisors_genadptdb), see the *Performance Management Advisors 8.1 Deployment Guide* for releases 8.1.2 and later. See "Migrating the Advisors Suite – 8.1 Releases" on page 21 for details about running the Object Migration Wizard to move the AGA configuration database data.

Release 8.5.0   Starting in release 8.5.0, FA no longer has a standalone database. The FA database content moves to the Advisors Platform database. The Object Migration Wizard includes an option in release 8.5.0 to move the FA database content to the Platform database (`Frontline Advisor Database Transfer`). If you use FA, you must run the FA options in the Object Migration Utility in this order:

1. Frontline Advisor Database Transfer
2. Frontline Advisor Metrics

More information is available in the Procedure: Migrating the Advisors Suite – 8.5 Releases, on page 26.

Procedure:
Running the Object Migration Wizard

Prerequisites

- Ensure a supported version of Java is installed.
- If you must run the user migration utility, ensure you run it before running the object migration wizard.
- If you are migrating from release 8.1.5 to 8.5.0, the database migration scripts must be executed before running this wizard.
- The Configuration Server user supplied must have read, create, and change permissions on the selected tenant.

Start of procedure

1. Extract the file `advisors-migration-wizard-<version>.jar` from the `advisors-platform-distribution-<version>.zip/ip/supplement` folder.

2. Open the command prompt and change to the directory where the file `advisors-migration-wizard-<version>.jar` is extracted.

3. Run the following command:
   `java -jar advisors-migration-wizard-<version>.jar`
   The migration wizard launches; click `Next`.

4. Select the migration path and click `Next`.

   You can select only one migration option in a single run of the wizard, but you can run the wizard as many times are necessary to complete your migration. For more information about each migration option, go to the relevant procedure:
   - Procedure: Using the Contact Center/Workforce Advisor Objects Migration Option, on page 36
   - Procedure: Using the Frontline Advisor Metrics Migration Option, on page 37 (*for migration to release 8.1.5 only*)
   - Procedure: Using the Genesys Adapter Configuration Migration Option, on page 38
   - Procedure: Using the Frontline Advisor Database Transfer Migration Option, on page 40 (*for migration to release 8.5.0 only*)

End of procedure

Procedure:
Using the Contact Center/Workforce Advisor Objects Migration Option

Purpose: To migrate Contact Center Advisor/Workforce Advisor objects and metrics. You can also migrate existing module access privileges using this option; although this option is placed under the CCAdv/WA migration path, it migrates the module privileges for *all* Advisors components.

Start of procedure

1. Select the items you want to migrate from the Advisors database. You can select more than one item at a time, but the following rules apply:
   - You must migrate your CCAdv/WA metrics, but migration of other data and objects is optional.
   - You must migrate contact center objects before you can migrate contact center permissions.

- You must migrate application groups before you can migrate application group permissions.

   Click `Next`.

2. Select the type of database you use in your enterprise and enter information in fields, as requested.

   The migration wizard prompts for information about database types supported in the release to which you are migrating. For example, in releases where Oracle RAC was first introduced, the wizard prompts you for the location of the file that contains the JDBC URL when you select the Oracle RAC database type. You can find information about prompts, and the type of information to enter at prompts, in the deployment procedures in the *Performance Management Advisors Deployment Guide*.

   Click `Next`.

3. The `Migration Source Database` screen prompts for connection details for the Platform database.

   After you enter your information on the screen, click `Next`.

4. Enter details about the Genesys Configuration Server to which selected objects are to be migrated. Click `Next`.

   The `Installation Progress` screen displays.

5. If required, check the details you have entered by using the `Show Details` button. When the details are correct, click `Install` to proceed with the migration.

6. When the migration is complete, review the log for errors or warnings.

End of procedure

Procedure:
Using the Frontline Advisor Metrics Migration Option

Purpose: To register Frontline Advisor metrics in Genesys Configuration Server for user access control as part of an Advisors upgrade or a new installation. If you are migrating from FA release 8.1.5 to 8.5.0, you must run the `Frontline Advisor Database Transfer` migration option before you run the `Frontline Advisor Metrics` migration option.

Note: To migrate module access privileges, you must run the `Contact Center/Workforce Advisor Objects` migration option; although the option to migrate module access privileges is placed under the CCAdv/WA migration path, it migrates the module privileges for all Advisors components.

Start of procedure

1. Select the type of database you use in your enterprise and enter information in fields, as requested.

    The migration wizard prompts for information about database types supported in the release to which you are migrating. For example, in releases where Oracle RAC was first introduced, the wizard prompts you for the location of the file that contains the JDBC URL when you select the Oracle RAC database type. You can find information about prompts, and the type of information to enter at prompts, in the deployment procedures in the *Performance Management Advisors Deployment Guide*.

    Click Next.

2. For migration to releases up to – and including – release 8.1.5, the Migration Source Database screen prompts for connection details for the Frontline Advisor database.

    For migration to release 8.5.0, you must enter connection details for the Advisors Platform database on the Migration Source Database screen.

    After you enter your information on the screen, click Next.

3. Enter details about the Genesys Configuration Server to which selected objects are to be migrated.

    Click Next.

    The Installation Progress screen displays.

4. If required, check the details you have entered by using the Show Details button. When the details are correct, click Install to proceed with the migration.

5. When the migration is complete, review the log for errors or warnings.

End of procedure

Procedure:
Using the Genesys Adapter Configuration Migration Option

Purpose: Starting in release 8.1.5, the AGA configuration database is no longer used. The Genesys Adapter Configuration Migration option is available to migrate from Advisors release 8.1.4 to release 8.1.5. The tool also supports migrating from Release 8.1.3 to 8.1.5, but source metrics added for Frontline Advisor in Release 8.1.4 are not migrated. The option migrates data from the Advisors Genesys Adapter configuration database to the Advisors Platform database and Genesys Configuration Server, as required. See the *Performance Management Advisors 8.1 Deployment Guide* for additional information.

Prerequisites

- Create the Object Configuration User before running the `Genesys Adapter Configuration Migration` option; the migration option prompts you for the Object Configuration User information. See the *Performance Management Advisors 8.1 Deployment Guide* for details about the Object Configuration User.

- For best results, Genesys recommends that you configure the following permissions for the Configuration Server user you will specify in the migration wizard (Step 4 on page 39):

  — `Change Permissions` access permissions to update the security permissions of the monitored objects.

  — `Change` access permission to update the annex properties of the monitored objects.

  — `Create` and `Change` access permissions to create and update business attributes.

Start of procedure

1. Select the type of database you use in your enterprise.

   If you select Oracle, the wizard also prompts you for the following information:

   - Oracle setup – Select the option that describes your environment:

     — Select the `Basic` option if you use a single-instance Oracle database.

     — Select the `RAC connectivity setup` option if you use Oracle RAC.

   - Oracle JDBC driver location

   Click `Next`.

2. The `Migration Source Database` screen prompts for connection details for the AGA configuration database.

   Enter your information, and click `Next`.

3. The `Migration Destination Database` screen prompts for connection details for the Platform database.

   Enter your information, and click `Next`.

4. Enter details about the Genesys Configuration Server to which selected objects are to be migrated. See Prerequisites on page 39 for important information about the Configuration Server user.

   The `Config Server Name` is the name of the application (for example, confserver).

   Click `Next`.

5. Enter the Object Configuration User you configured for Data Manager.

   Click `Next`.

   The `Installation Progress` screen displays.

6. If required, check the details you have entered by using the `Show Details` button. When the details are correct, click `Install` to proceed with the migration.

7. When the migration is complete, review the log for errors or warnings.

End of procedure

Procedure: Using the Frontline Advisor Database Transfer Migration Option

Purpose: Starting in release 8.5.0, Frontline Advisor data is stored in the Advisors Platform database. Use the `Frontline Advisor Database Transfer` option to migrate from Advisors release 8.1.5 to release 8.5.0 only; do not use this option during migration to any other release.

To migrate from FA release 8.1.5 to 8.5.0, you must migrate the FA data from the FA database to the Platform database *before* you migrate the metrics (run the `Frontline Advisor Database Transfer` migration option before you run the `Frontline Advisor Metrics` migration option).

Start of procedure

1. Select the type of database you use in your enterprise.

   If you select Oracle, the wizard also prompts you for the following information:
   - Oracle setup – Select the option that describes your environment:
     — Select the `Basic` option if you use a single-instance Oracle database.
     — Select the `RAC connectivity setup` option if you use Oracle RAC.
   - Oracle JDBC driver location

   Click `Next`.

2. The `Migration Source Database` screen prompts for connection details for the Frontline Advisor database.

   Enter your information, and click `Next`.

3. The `Migration Target Database` screen prompts for connection details for the Platform database.

   Enter your information, and click `Next`.

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4. The `Database Schema Names` screen prompts for the name of the source database schema that you are migrating (that is, the FA database schema), as well as the name of the target database schema (the schema in the Platform database) to which you are migrating.

   Enter your information, and click `Next`.

   The `Installation Progress` screen displays.

5. If required, check the details you have entered by using the `Show Details` button. When the details are correct, click `Install` to proceed with the migration.

6. When the migration is complete, review the log for errors or warnings.

End of procedure

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