



**Genesys 8.1**

# **Performance Management Advisors**

## **Migration Guide**

TEMPORARY DOCUMENT: Available until the information contained herein is integrated into the *Genesys 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, page 3](#)
- [Documentation Resources, page 4](#)
- [Preparing for Migration, page 5](#)
- [Supporting Software Components, page 6](#)
- [Overview of General Changes in the Advisor Suite by Release, page 8](#)
- [Migration Tools, page 15](#)
- [Important Migration Information, page 17](#)
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In addition, see the [Genesys Interoperability Guide](#), which includes tables with interoperability information about 6.1, 6.5, 7.x, and some 8.x releases of Genesys products.

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## 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” on [page 7](#).

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## 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 from 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.
- *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.

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## Preparing for Migration

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

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- Ensure you have a backup of your current Advisor Suite and all associated configuration before migration.

- Review “Migration Tools” on [page 15](#) for information about utilities that may be required to migrate your Advisor Suite.
- Read “Migration” on [page 18](#) to ensure that you are fully prepared to perform all the steps.
- Review “Overview of General Changes in the Advisor Suite by Release” on [page 8](#) 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.

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## 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) for Performance Management Advisors
- 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 Release 8.1 and later only)
- If using Oracle, the appropriate Oracle JDBC driver is also required. You can obtain the driver from the Oracle Web site ([www.oracle.com](http://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 *Performance Management Advisors Deployment Guide*.

## 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

### Contact Center Advisor – Mobile Edition

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

- Windows Server
- Microsoft SQL Server or Oracle
- Java JDK
- Apache or Apache SSL Secure Web Server
- Advisors Platform
- Contact Center Advisor

For 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*.

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# 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” on [page 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:
  - 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).
  - To see objects that were activated 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.



- 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 8.1.2.
- 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 and WA supports 1500 concurrent users.
- 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.

- 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. 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.

## 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).
- 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.

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**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.

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## 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.

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## Migration Tools

This section describes two migration utilities that are important for migrations from:

- Advisors 3.3, 8.0, 8.1.0 to 8.1.1 and later
- Advisors 8.1.1 to 8.1.2 and later

## User Migration Utility

Starting with Advisors release 8.1.1, user configuration functionality moved to the Genesys Configuration Manager. A user migration utility is packaged with the 8.1.2 Advisors Platform distribution. This 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 or copies user and contact records along with each user's module access information from the 3.3, 8.0, or 8.1.0 Advisors Platform Database to Configuration Manager. The migration scripts remove any source tables that are obsolete after running the user migration utility.

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.

## Advisors Object Migration Wizard

With the introduction of role-based access control beginning in release 8.1.2 (see the *Performance Management Advisors 8.1 Contact Center Advisor/Workforce Advisor Administrator User's Guide*), many configuration objects have been moved to the Genesys Configuration Manager. The Advisors Object Migration Wizard automates the migration of these objects. The Advisors Object Migration Wizard is packaged with the Advisors Platform distribution.

Migration of metrics is required. Migration of other objects, such as user permission records for contact centers and application groups, is optional. However, if you do not migrate objects such as permissions records or module access privileges, you must configure these objects manually in Configuration Manager.



Starting in release 8.1.5, use the Advisors Object Migration Wizard to migrate data used by Data Manager:

- Move source metric definitions and statistics templates stored in the Advisors Genesys Adapter (AGA) database to the corresponding Platform tables for Data Manager use.
- Move configured objects and filters from the AGA database to Genesys Configuration Server for Data Manager use.

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**Note:** 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.

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For detailed information, see the *Performance Management Advisors Deployment Guide*.

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## Important Migration Information

Read each of the following items carefully before migrating Advisors components:

- You must migrate Advisors database schemas incrementally. Migration scripts typically have very specific filenames and release numbers, but – in general – 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 you require; run the migration scripts in sequential order up to the release to which you are migrating, and according to any additional instructions in Release Notes.

- 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 “Advisors Object Migration Wizard” on [page 16](#) in this document, and review the Data Manager information in the *Performance Management Advisors Deployment Guide*.

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## Migration

Read the following procedure before you begin to migrate the Advisor Suite to ensure that you are fully prepared to perform all the steps.

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### Procedure: Migrating the Advisors Suite

#### Start of procedure

1. Ensure that all the external prerequisites are in place (see “Supporting Software Components” on [page 6](#)).
2. Upgrade your databases, if required.
3. Uninstall the previous version of each application from the server.

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**Note:** The previous installation must be completely removed by deleting or renaming its installation directory. Genesys recommends that you first uninstall the Windows services for the Advisors CCAdv XML Generator and Advisors Suite Server (that is, the Platform Server) before you delete the installation directory. Uninstalling the Windows services requires files that are in the installation directories you are going to delete or rename.

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4. Migrate the databases. It is very important to migrate the databases in the order listed here.

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**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.

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**Important  
Information for  
Release 8.1.5**

- a. Migrate the AGA metrics databases (not required for migration to 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 the previous release of Advisors 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
- 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 on page 22](#).
- c. Migrate the AGA configuration databases (not required for migration to 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.

**Important  
Information for  
Release 8.1.5**

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**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).

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- 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.
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.

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- 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.
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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**
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**