Abstract

Starting with CIC 2016 R1, Interaction Desktop replaced Interaction Client .NET Edition as the primary CIC client. This document describes processes for migrating 3.0 configuration settings and 4.0 user settings and client templates from Interaction Client .NET Edition to Interaction Desktop.
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Introduction

Starting with CIC 2016 R1, Interaction Desktop replaced Interaction Client .NET edition. Interaction Desktop includes all the features of Interaction Client .NET Edition. It supports the same interaction types (calls, callbacks, chats, email, and work items). It supports Interaction Client add-ins and all the same integrations with third-party applications such as Microsoft Lync.

Interaction Desktop enables agents to organize their work in new custom workspaces containing views appropriate to a single task, such as managing chats or callbacks. Interaction Desktop also provides dedicated views for managing email messages. These email views provide a full email application experience with email folders, email message preview, and an improved email editor.

More information

For more information about using Interaction Desktop, see these quick reference materials:


Interaction Desktop also has a complete help system that is available on the Interaction Desktop Help menu and also in PDF and DOC format at:


Also, there is a client comparison chart that compares the features of all the CIC clients in IC 3.0 and CIC 2016. It is available in the PureConnect Documentation Library at [http://help.genesys.com/cic/desktop/pdfs/client_comparison_qr.pdf](http://help.genesys.com/cic/desktop/pdfs/client_comparison_qr.pdf).


Audience

This document is for CIC administrators working to make the transition from Interaction Client .NET Edition to Interaction Desktop easier for agents and other users.

3.0 vs. 4.0 migration

The process for migrating Interaction Client .NET Edition settings to Interaction Desktop CIC 2016 is different for 3.0 and 4.0. Individual client workstations store the 3.0 client configuration information while the CIC server stores the 4.0 client configuration information. A CIC administrator manages the entire 4.0 client migration process on the CIC server, but must arrange for the 3.0 client migration to occur on each client user’s workstation.

See the appropriate section in this document:

Interaction Client .NET Edition 3.0 migration

This section describes the migration of client settings from Interaction Client .NET Edition 3.0 to Interaction Desktop.

What the 3.0 migration utility does

The Legacy Interaction Client Settings migrator converts 3.0 Interaction Client .NET Edition configuration settings stored on the workstation as Windows Registry entries to Interaction Desktop user settings. This migration includes view selection and layout. It also preserves any modifications that users with the Customize Client security right have made, such as the selection and arrangement of view toolbar buttons and columns.

3.0 Migration process

Each 3.0 Interaction Client .NET Edition user runs the migration utility on his or her workstation. This migration creates an Interaction Desktop default workspace containing the same CIC client views in the same arrangement as the user's most recent experience of Interaction Client .NET Edition.

*Note: The 3.0 migration process replaces any previous view selection and arrangement in Interaction Desktop with the settings from the Interaction Client .NET Edition.*

There are two ways CIC client users can migrate their 3.0 Interaction Client .NET Edition settings to Interaction Desktop.

- The simplest and preferred method is to have your client users start Interaction Desktop for the first time with a parameter.
  InteractionDesktop.exe –MigrateLegacyClientData
- The other method is for each client user run a stand-alone migration utility, LegacyInteractionClientMigrator.exe, on their workstation. The CIC administrator then must run 4.0 migration utility, InteractionClientSettingsMigrator.exe, on the CIC server.
Using the legacy migration parameter to migrate from 3.0

Here is a description of the migration process for a CIC client user who employs the `MigrateLegacyClientData` parameter to migrate from 3.0 Interaction Client .NET Edition to Interaction Desktop.

1. A CIC client user has configured Interaction Client .NET Edition 3.0 to display a preferred arrangement of selected client views.

![Interaction Client Operator Console](image)

2. This CIC client user has the **same user name** in both the 3.0 and 2016 CIC systems. The 2016 CIC server has the **same server name** as the 3.0 CIC server.

   Important: If these names do not match, the CIC user cannot use the MigrateLegacyClientData parameter to migrate client settings. See *Using the legacy migration utility to migrate from 3.0* on page 9.

3. The CIC user runs `InteractionDesktop.exe -MigrateLegacyClientData` either from a Windows shortcut or a command prompt.

   The CIC administrator can create an Interaction Desktop shortcut with this parameter and use Windows Group Policy or some other method to distribute it to all client users. Or the CIC client users could modify the Interaction Desktop shortcut themselves.
CIC client users could also use the parameter to start Interaction Desktop from a command prompt in the C:\Program Files (x86)\Interactive Intelligence\ICUserApps\ directory.

4. The CIC user logs on to Interaction Desktop and selects the **Save Password** check box.

*Important: If the CIC user does not select this check box, the migration process does not start.*
5. The migration process starts and reports on its progress.


   Note: There is a slight delay before Interaction Desktop appears for the first time after the migration.
7. If CIC users employ the Interaction Desktop shortcut to migrate, after the migration process completes, they should edit the shortcut and remove the `–MigrateLegacyClientData` parameter.

    *Note:* This step is optional, but recommended. Once the migration process completes successfully, the CIC user cannot use the parameter again by accident to rerun the migration. The CancelRun registry key prevents the migration process from running again.

**Using the legacy migration utility to migrate from 3.0**

Here is a description of the migration process for a CIC client user who runs the legacy migration utility to migrate from 3.0 Interaction Client .NET Edition to Interaction Desktop.

1. A CIC client user has configured Interaction Client .NET Edition 3.0 to display a preferred arrangement of selected client views.

2. The CIC user starts the legacy migration utility, using any necessary parameters:

   C:\Program Files(x86)\Interactive Intelligence\ICUserApps\LegacyInteractionClientMigrator

**User, Password, and Host parameters**

The migration utility uses the user, password, and host parameters to supply logon information for Interaction Desktop. The CIC user must be able to log on to Interaction Desktop to migrate Interaction Client .NET Edition settings.

    *Note:* These parameters are **mandatory** if the CIC user has not run Interaction Client .NET Edition 4.0 or Interaction Desktop before attempting the migration. The migration utility attempts to use stored CIC credentials from a successful 4.0 or later connection. If the migration utility fails to log on with CIC credentials, it attempts to use Windows authentication credentials.

**Oldhost parameter**

If your CIC 3.0 and 2016rX server names are different, use the oldhost parameter to specify the name of the CIC 3.0 server.

**Example:**


<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>-u/-user</td>
<td>CIC client user name</td>
</tr>
<tr>
<td>-p/-password</td>
<td>CIC client user password</td>
</tr>
<tr>
<td>-h/-host</td>
<td>CIC server name</td>
</tr>
<tr>
<td>-oldhost</td>
<td>CIC 3.0 server name if different from CIC 2016rX server name.</td>
</tr>
<tr>
<td>-force</td>
<td>CIC users can employ the force parameter to run the migration utility again, if they ran it previously.</td>
</tr>
</tbody>
</table>

3. The legacy migration utility converts and saves CIC client settings in 4.0/2015 format.

4. Next, either the CIC administrator or the CIC client user must run the 4.0 Migration utility, **InteractionClientSettingsMigrator**, in both **auto** and **force** mode. For details, see **How to run the 4.0 Interaction Client Settings Migrator utility** on page 15.

5. After the 4.0 Migration Utility finishes, the CIC user should log on to Interaction Desktop and confirm that selected views now appear in the Interactions Desktop default workspace.
3.0 Migration process flowchart
Interaction Client .NET Edition 4.0 migration

This section describes the migration of client settings from Interaction Client .NET Edition 4.0 to Interaction Desktop.

What the 4.0 migration utility does

The Interaction Client Settings Migrator converts existing Interaction Client .NET Edition client templates to Interaction Desktop client templates. It also migrates Interaction Client .NET user settings to Interaction Desktop user settings.

Client templates

CIC administrators or template managers create client templates and assign them to users. These templates affect the appearance and functionality of a CIC client. When the CIC server upgrades to CIC 2015 R3 or later, the migrator utility creates Interaction Desktop client templates based on existing Interaction Client .NET Edition templates.

Both Interaction Client .NET Edition and Interaction Desktop client templates:

- Can supply a standard set of user configuration settings.
  
  Note: Client templates do not contain configuration settings by default. To use a template to force user settings changes, you use Interaction Desktop in template mode to create or modify a template and change a setting in the Configuration dialog.

- Display a standard set of views, determine which columns and toolbar buttons appear in these views, and set the order in which the columns and buttons appear on these views.
• Set a default location for views included in the template.
• Control whether the CIC client starts in Mini Mode or standard mode.
• Display selected Fast Status buttons in Mini Mode.

In addition, Interaction Desktop client templates can supply:
• Multiple, pre-configured workspaces, complete with selected views for each workspace.
• The names of selected folders in the Email Folders view.
• The default font type and size for text outgoing email messages.
• Selected Fast Status buttons in the Interaction Desktop status bar, in both the standard mode and Mini Mode.

**Client template files**
CIC stores client template files on the CIC server in \I3\IC\Resources\Client Templates. Regardless of the mode in which you run the utility, it creates Interaction Desktop versions of all your Interaction Client .NET Edition templates. The new template files have – Desktop appended to the file name; for example, Marketing template – Desktop.

*Note:* When the CIC server upgrades to CIC 2015 R3 or later, the process also supplies a standard set of Interaction Desktop templates: All Channel Agent, Basic Chat Agent, Basic Email Agent, Basic Email Agent with preview, and Default template.

**User settings**
CIC client users with the Customize Client Security right can customize their personal CIC client configuration settings. Personal configuration settings include all the configuration settings available in a client template.

**User settings files**
CIC stores Interaction Client .NET Edition user settings in individual *Interaction Client.zip* files on the CIC server in application settings directories:
I3\IC\ClientSettings\username\PersonalStorage\ApplicationSettings.
The Interaction Client Settings Migrator creates Interaction Desktop versions of the Interaction Client .NET Edition files. Agents who use Interaction Desktop and set it up in any way, by adding a view for example, also create Interaction Desktop user setting files. CIC stores these *InteractionDesktop.zip* files in I3\IC\Work\Users\username\PersonalStorage\ApplicationsSettings.

**4.0 Migration process**
The Interaction Client Settings Migrator runs automatically and silently when the CIC server upgrades to CIC 2015 R3 or later.

**Switchover pair**
If your configuration includes a CIC server switchover pair, the migration process has to occur only on the primary server.
Types of migration
The migration utility can run in three different modes.

<table>
<thead>
<tr>
<th>Mode</th>
<th>Description</th>
</tr>
</thead>
</table>
| Automatic| In automatic mode, the migration tool converts user settings only for users who have not yet modified the default layout or configuration settings for Interaction Desktop. Automatic mode preserves user settings for agents who have already used Interaction Desktop and possibly made configuration changes. It overwrites any previously migrated templates.  
Note: An administrator who wants to run the migration utility from a script can use the /auto option to run it in automatic mode: InteractionClientSettingsMigrator.exe /auto. |
| Default  | The migration tool in default mode (no options) converts user settings the same way as automatic mode, but it pauses to ask you if previously migrated templates should be overwritten.                                      |
| Forced   | After the upgrade, you can also run the migration tool from the command line with the /force option to migrate Interaction Client .NET user settings for all users.  
Note: Interaction Desktop has been available in a beta release since CIC 4.0 SU 5. Early adopters or users who explored Interaction Desktop in an early form created Interaction Desktop user settings files that are overwritten only if you use the /force option. |

Automatic vs. Default migration
The /auto option causes the utility to assume you want to overwrite any existing Interaction Desktop templates. You can run the migration tool again in default mode after the upgrade to CIC 2015 R3 or later. Default mode lets you decide whether to overwrite any previously migrated templates.

Forced migration vs. Normal migration
A forced migration converts all user settings and client templates. A normal migration does not convert settings for users who have modified Interaction Desktop. A normal migration in default mode also enables you to decide whether to convert client templates.

<table>
<thead>
<tr>
<th>Scenario</th>
<th>Forced migration</th>
<th>Normal migration</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agent modified the Interaction Desktop layout or configuration.</td>
<td><strong>Migrates</strong> Interaction Client .NET Edition client settings to</td>
<td><strong>Does not migrate</strong></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Interaction Client .NET Edition client settings</td>
</tr>
</tbody>
</table>
### Scenario

<table>
<thead>
<tr>
<th>Scenario</th>
<th>Forced migration</th>
<th>Normal migration</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agent modified the Interaction Desktop layout or configuration and then went back and modified the Interaction Client .NET Edition layout or configuration settings.</td>
<td>Interaction Desktop client settings and <strong>overwrites the existing Interaction Desktop layout and settings.</strong></td>
<td>to Interaction Desktop client settings. The Agent keeps the existing Interaction Desktop layout and settings.</td>
</tr>
</tbody>
</table>

#### How to run the 4.0 Interaction Client Settings Migrator utility

The upgrade to CIC 2015 R3 or later places a copy of the migrator utility on the CIC server. You can run this utility by opening a Command Prompt, navigating to the `\I3\IC\Server` directory and using this command syntax:

- To migrate settings, type `InteractionClientSettingsMigrator`
- To suppress user prompts during migration, use the command-line argument: `InteractionClientSettingsMigrator /auto`
- To force the migration of all user settings, including users with existing Interaction Desktop settings, use the command-line argument: `InteractionClientSettingsMigrator /force`
4.0 Migration process flowchart

Prompt: "Proceed with settings migration?"

Was command line argument "auto" used?

Yes

Execute InteractionClientSettingsMigrator.exe
Possible command line flags: /auto /force

Was command line argument "force" used?

Yes

Loop through all "Interaction Client.zip" Settings.xml files

Create a new "InteractionDesktop.zip" Settings.xml file (overwrite if necessary)

Create a PreviouslyMigratedSettings.csv to store users and created dates for Interaction Desktop templates

Yes

Does a PreviouslyMigratedSettings.csv file exist?

Yes

Write or update the user and LastModifiedDate of the newly created "InteractionDesktop.zip" file to PreviouslyMigratedSettings.csv

No

No

Yes

Yes

Was command line argument "force" used?

Yes

Was any ClientTemplates already migrated?

Were any ClientTemplates with the same names. Do you wish to overwrite them?"n

Yes

Loop through all ClientTemplates, and create corresponding "Template - Desktop" files, if they don't exist.

No

Yes

Loop through all ClientTemplates, and create corresponding "Template - Desktop" files, overwriting them if they exist.

Done?

Yes

No

Yes

Prompt: "There are templates with the same names. Do you wish to overwrite them?"

Yes

No

No

Yes

Does a corresponding "InteractionDesktop.zip" Settings.xml file exist?

Yes

Does PreviouslyMigratedSettings.csv contain this file?

And

Is the timestamp for this file in PreviouslyMigratedSettings.csv newer than or equal to the LastModifiedDate of the existing "InteractionDesktop.zip" file?

Yes

No

No

Yes

If there is no entry in PreviouslyMigratedSettings.csv they were never migrated, because they already had an InteractionDesktop.zip Settings.xml file

If the LastModifiedDate matches the timestamp in Migrated.csv, the user has not made any setting changes since the last migration and they are safe to migrate.
## Change Log

<table>
<thead>
<tr>
<th>Change Log Date</th>
<th>Changed...</th>
</tr>
</thead>
<tbody>
<tr>
<td>August 18, 2017</td>
<td>Rebranded using Genesys terminology. Updated title page and Copyright and Trademarks page.</td>
</tr>
</tbody>
</table>
| May 2, 2016       | IC-136928: Add old host parameter to the LegacyInteractionClientMigrator  
• Title page: Changed revision to CIC 2016 R4.  
• Copyright and Trademark page: Updated to 1/12/16 version.  
• More Information: Added link to printable documentation.  
• In the Using the legacy migration parameter to migrate from 3.0 section, step 2, added Important: If these names do not match, the CIC user cannot use the MigrateLegacyClientData parameter to migrate client settings. See Using the legacy migration utility to migrate from 3.0 on page 9.  
• In the Using the legacy migration utility to migrate from 3.0 section, rewrote step 2 to incorporate Oldhost parameter information.  
• In the 3.0 Migration process flowchart section, updated screen capture. |
| December 14, 2015 | In the More Information section, updated the URLs for Quick Reference Materials and Client Comparison Matrix in the new PureConnect Documentation Library.                                                 |
| August 31, 2015   | IC-131786 Added new sections:  
• 3.0 vs. 4.0 migration  
• What the 3.0 migration utility does  
• 3.0 Migration process |
| July 29, 2015     | IC-131357 Rewrote the Migration process section to make the operation of the three available modes clearer. Also checked for rebranding changes.                                                              |
| June 8, 2015      | Corrected the name of the utility in the How to run the Interaction Client Settings Migrator manually section. Changed it from InteractionSettingMigrator to InteractionClientSettingsMigrator. Made rebranding changes to cover. |