Migration Checklists

2018 R4

Last updated June 14, 2018
(See Change Log for summary of changes.)

Abstract

Follow these checklists to complete a CIC 2.4/3.0 to 2015 R1 or later migration, and if applicable, an Interaction Dialer 2.4/3.0 to 2015 R1 or later migration. Each summary step contains a reference to the CIC Migration Guide.

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Migration Checklists

This document contains checklists to follow when migrating from CIC 2.4/3.0 to 2015 R1 or later. It also contains checklists for migrating from Interaction Dialer 2.4/3.0 to 2015 R1 or later, if applicable. Each summary step contains a reference to the CIC Migration Guide: Installation and Configuration Guide. For more information, see https://help.genesys.com/cic/mergedProjects/wh_iandc/desktop/ic_migration_guide.htm.

Checklist: Complete migration planning procedures

❑	**Notify PureConnect Customer Care about the migration**
❑	**Upgrade your CIC, Interaction Media Server, (and Interaction Dialer) product licenses** Before you migrate, convert your existing license to a 4.0 license. For more information about licensing changes and requirements, see *CIC 4.0 License Upgrade Guide* on the Product Information site at https://my.inin.com/products/cic/Pages/Marketing-Collateral.aspx. Request a CIC product (and Interaction Dialer) upgrade, and order and generate the CIC (and Interaction Dialer) 4.0 license. Request an Interaction Media Server upgrade. See: • "Upgrade your CIC and Interaction Media Server product licenses" and "Interaction Dialer license upgrades" in "Migration Planning" in the *CIC Migration Guide*. • *CIC 4.0 License Upgrade Guide*
❑	**Review migration planning considerations** Review the CIC components that the current migration package release supports and how it can impact your migration. • CIC configuration data migration • CIC database migration • Telephony • Switchover • Handlers • Managed IP phones • Interaction Media Server • Workstations • Language Packs • Custom applications • Custom reports • Interaction Dialer • Interaction Conference • Interaction Director See "Migration Planning" in the *CIC Migration Guide*.

❑	**Review guidelines for creating your migration environment** We recommend that your CIC 2.4/3.0 to CIC 2015 R1 or later migration environment include a development environment for testing system functionality as you complete the migration tasks. Review and consider the guidelines presented in Appendix A, which provide reasonable fall back strategies for various stages of the migration process: • The development environment • Virtualized development environment recommended • The development database • The development CIC server • Other servers in the development environment • Migrating to the product environment See "Appendix A: Guidelines for creating your migration environments" in the *CIC Migration Guide*.

Export 2.4/3.0 configuration data

Checklist: Install Interaction Migrator

❑	**About Interaction Migrator** Interaction Migrator exports and imports configuration data related to the CIC server, Interaction Dialer, Interaction Media Server, and other CIC components. See: • "About Interaction Migrator" in "Install Interaction Migrator" in the *CIC Migration Guide*. • *Interaction Migrator Technical Reference*.
❑	**Review Interaction Migrator version information** The tools in the latest supported migration package support the latest CIC release and patch. The Interaction Migrator install indicates the CIC release version, for example, `Migrator_2015_R2.msi`. The Interaction Migrator install no longer contains the build version number in the install file name. However, once installed, the build version number is still available on the **Welcome** page in the lower right corner. See "Interaction Migrator version information" in "Install Interaction Migrator" in the *CIC Migration Guide*.
❑	**Fulfill requirements for installing Interaction Migrator** For each CIC server and Interaction Media Server that you intend to export or import data as part of the migration, ensure that you have the Microsoft .NET Framework version the CIC version supports installed. • .NET Framework 4.5.2 or later and 3.5.1 for CIC 4.0 and Interaction Media Server 4.0. • .NET Framework 3.0 for CIC 3.0 and Interaction Media Server 3.0 See "Fulfill Microsoft .NET Framework requirements" in "Install Interaction Migrator" in the *CIC Migration Guide*.
❑	**Install Interaction Migrator on the CIC 2.4/3.0 server** For instructions on downloading and copying the Migration `.iso`, see the **CIC 2.4/3.0 to CIC 2015 R1 or Later Migrations** page at https://my.inin.com/products/cic/Pages/Migrations.aspx. See "Install Interaction Migrator" in "Install Interaction Migrator" in the *CIC Migration Guide*.

Checklist: Export CIC 2.4/3.0 (and Dialer 2.4/3.0) configuration data

❑	**Review CIC configuration data migration information** The current release of the CIC 2.4/3.0 to CIC 4.0 migration package supports migrating all users, phones, and functions from one CIC 2.4/3.0 server (pair) to a new CIC 2015 R1 or later server (pair) in one phase using Interaction Migrator. Interaction Migrator exports and imports Interaction Dialer 2.4/3.0 configuration data along with the CIC 2.4/3.0 configuration data. See "CIC configuration data migration in Export CIC 2.4/3.0 Configuration Data" in the *CIC Migration Guide*.
❑	**If applicable, run the Interaction Recorder Migration Prep Utility (and ESs)** If you use Interaction Recorder, you may need to run the Interaction Recorder Migration Prep Utility before exporting CIC data. Locate the Interaction Recorder Migration Prep Utility `.zip` file, for example, `IRMigrationPrep_30.zip`, on the Migration `.iso`. See "Who should run the Interaction Recorder Migration Prep Utility?" and "Run the Interaction Record Migration Prep Utility" in "Export CIC 2.4/3.0 Configuration Data" in the *CIC Migration Guide*.
❑	**Complete handler pre-migration procedures** Interaction Migrator does not publish or manage custom handlers. If you use custom handlers, follow the step by step handler pre-migration procedures. • Plan for base handler modifications • Plan for backup handler customizations • Determine which handlers have changed • Back up most recently published handlers See "Complete handler pre-migration procedures" in "Migrate CIC 2.4/3.0 Handlers" in the *CIC Migration Guide*.
❑	**If applicable, complete Dialer pre-migration procedures** If you use Interaction Dialer, follow the Interaction Dialer pre-migration procedures: • Copy the UDL folder from the CIC server to the CIC/ODS server • Copy the Dialer configuration file from the CIC server to the CIC/ODS 2.4/3.0 server See "Complete Interaction Dialer pre-migration procedures" in "Export CIC 2.4/3.0 Configuration Data" in the *CIC Migration Guide*.

❑	**Export CIC 2.4/3.0 and (Dialer 2.4/3.0) configuration data using Interaction Migrator** Follow the step by step instructions to run Interaction Migrator on the CIC 2.4/3.0 server to export the CIC (and Dialer) 2.4/3.0 configuration data. If this server is a CIC/ODS server, Interaction Migrator prompts for the location of the Dialer configuration file, so that you can specify the Dialer configuration data to export. See "Export CIC 2.4/3.0 and (Dialer 2.4/3.0) configuration data using Interaction Migrator" in "Export CIC 2.4/3.0 Configuration Data" in the *CIC Migration Guide*.

Prepare the 2015 R1 or later server environment

Checklist: Prepare the CIC 2015 R1 or later server environment

❑	**Fulfill PureConnect 2018 R4 or later server requirements** **For PureConnect 2018 R4 or later only**, install a Windows 2016 or Windows 2012 R2 server with Microsoft .NET Framework 4.7 or later and Microsoft .NET Framework 3.5.1. See: • "CIC server hardware requirements" and "CIC server software requirements" in "Prepare the CIC 2018 R4 or Later Server Environment" in the *CIC Migration Guide*. • *PureConnect Installation and Configuration Guide*. • *CIC Virtualization Technical Reference*.
❑	**Fulfill CIC 2015 R1 through 2018 R3 server requirements** **For CIC 2015 R1 through 2018 R3 only,** install a Windows 2012 R2 or Windows 2008 R2 SP1 server with Microsoft .NET Framework 4.5.2 or later and Microsoft .NET Framework 3.5.1. See: • CIC server hardware requirements and CIC server software requirements in Prepare the CIC 2015 R1 Through 2018 R3 Server Environment in the *CIC Migration Guide*. • *PureConnect Installation and Configuration Guide*. • *CIC Virtualization Technical Reference*.
❑	**Fulfill CIC 2015 R1 or later database server requirements** Before installing the CIC 2015 R1 or later server, ensure that you have fulfilled the requirements for the 2015 R1 or later database server. See: • "Database server requirements CIC 2015 R1 or later" in "Prepare the CIC 2015 R1 or later Server Environment" in the *CIC Migration Guide*. • *PureConnect Installation and Configuration Guide*.
❑	**Install the CIC 2015 R1 or later server and create the CIC 2015 R1 or later database, making choices applicable to migrations** Complete the following procedures: • Run the CIC 2015 R1 or later server install • Run IC Setup Assistant – Make recommended selections for migrations • Run the CIC 2015 R1 or later Firmware install

	• Run the CIC 2015 R1 or later Documentation Library install • (If applicable) Run one or more CIC 2015 R1 or later Language Pack installs • Run the Interactive Update Provider and Interactive Update Client 2015 R1 or later installs See: • "CIC 2015 R1 or later server installation" in "Prepare the CIC 2015 R1 or later Server Environment" in the *CIC Migration Guide*. • *PureConnect Installation and Configuration Guide*.
❑	**If applicable, change the site ID on the CIC 2.4/3.0 server** If you are consolidating multiple CIC 2.4/3.0 servers that have identical site IDs, change the site ID for each of those servers to make them unique, before importing the CIC 2.4/3.0 configuration data. See "If applicable, change site ID on 2.4/3.0 servers" in "Prepare the CIC 4.0 Server Environment" in the *CIC Migration Guide*.
❑	**Change the site ID on the CIC 2015 R1 or later server** Set the site ID of the new CIC 2015 R1 or later server so that it is different from the site ID of the CIC 2.4/3.0 server, before importing the CIC 2.4/3.0 configuration data. See: "Change site ID on the CIC 4.0 server" in "Prepare the CIC 2015 R1 or later Server Environment" in the *CIC Migration Guide*.
❑	**Install Interaction Migrator on the CIC 2015 R1 or later server** Follow the step by step instructions to install Interaction Migrator on the CIC 2015 R1 or later server. See "Install Interaction Migrator" in the *CIC Migration Guide*.

Checklist: Prepare the Interaction Dialer 2015 R1 or later server environment

For Interaction Dialer sites only.

❑	**Fulfill PureConnect 2018 R4 or later server requirements** **For PureConnect 2018 R4 or later only**, install a Windows 2016 or Windows 2012 R2 server with Microsoft .NET Framework 4.7 or later and Microsoft .NET Framework 3.5.1. Migrations require Interaction Dialer 4.0 SU 1 or later. See: • "CIC server hardware requirements" and "CIC server software requirements" in "Prepare the Interaction Dialer 2015 R1 or later Server Environment" in the *CIC Migration Guide*. • *Interaction Dialer Installation and Configuration Guide*.
❑	**Fulfill CIC 2015 R1 through 2018 R3 server requirements** **For CIC 2015 R1 through 2018 R3 only,** install a Windows 2012 R1 or Windows 2008 R2 SP1 server with Microsoft .NET Framework 4.5.2 or later and Microsoft .NET Framework 3.5.1. Interaction Dialer 4.0 SU 1 or later is required for migrations. See: • "CIC 2015 R1 or later server hardware requirements for Dialer" and "CIC 2015 R1 or later server software requirements for Dialer" in "Prepare the Interaction Dialer 2015 R1 or later Server Environment" in the *CIC Migration Guide*. • *Interaction Dialer Installation and Configuration Guide*.
❑	**Fulfill Dialer 2015 R1 or later database server requirements** Before installing the CIC 2015 R1 or later server, ensure that you have fulfilled the requirements for the 2015 R1 or later Dialer database server. See: • "Database server requirements" in "Prepare the Interaction Dialer 2015 R1 or later Server Environment" in the *CIC Migration Guide*. • *Interaction Dialer Installation and Configuration Guide*.
❑	**Install the CIC 2015 R1 or later server** See: • "Install the CIC 2015 R1 or later server" in "Prepare the Interaction Dialer 2015 R1 or later Server Environment" in the *CIC Migration Guide*. • *Interaction Dialer Installation and Configuration Guide*.

❑	**Create a UDL file for the 2015 R1 or later database (CIC server)** A database connection file (.UDL) is required to ensure that Interaction Dialer works cooperatively with your company's database system if the CIC database contains a contact list. The UDL file resides on the CIC server. See: • "Create a UDL file for the new 2015 R1 or later database" in "Prepare the Interaction Dialer 2015 R1 or later Server Environment" in the *CIC Migration Guide*. • *Interaction Dialer Installation and Configuration Guide*.
❑	**Fulfill ODS 2015 R1 or later server requirements** The Outbound Dialer Server (ODS) 2015 R1 or later server requires: • CIC 2015 R1 or later • Interaction Dialer 2015 R1 or later See: • "ODS 2015 R1 or later server software requirements" in "Prepare the Interaction Dialer 2015 R1 or later Server Environment" in the *CIC Migration Guide*. • *Interaction Dialer Installation and Configuration Guide*.
❑	**Install the ODS 2015 R1 or later server(s)** See: • "Install the ODS 2015 R1 or later server" in "Prepare the Interaction Dialer 2015 R1 or later Server Environment" in the *CIC Migration Guide*. • *Interaction Dialer Installation and Configuration Guide*.

Migrate the database

Checklist: Install CIC Database Migration Assistant

❑	**Review contents of CIC Database Migration Assistant package** The CIC Database Migration package consists of several CIC and Interaction Dialer utilities, tools, and scripts. See "About the CIC Database Migration Assistant package" in "Install CIC Database Migration Assistant" in the *CIC Migration Guide*.
❑	**Review CIC Database Migration Assistant version information** The tools in the latest supported migration package support the latest CIC release and patch. The CIC Database Migration Assistant install indicates the CIC release version, for example, `DBMigrationAssistant_2015_R2.msi`. The CIC Database Migration Assistant install no longer contains the build version number in the install file name. However, once installed, the build version number is still available in the Welcome dialog box in the lower right corner. There may be instances when Genesys updates CIC Database Migration Assistant between CIC releases to support database schema changes in the latest patch. If so, Genesys posts a new migration package on the **Downloads** page at https://my.inin.com/products/Pages/Downloads.aspx and updates the **Release Posted on** date. See "CIC Database Migration Assistant version information" in "Install CIC Database Migration Assistant" in the *CIC Migration Guide*.
❑	**Fulfill CIC Database Migration Assistant client computer requirements** You can install CIC Database Migration Assistant on most any computer; however, do not install CIC Database Assistant on the CIC server. **For PureConnect 2018 R4 or later only**, ensure that you have Microsoft .NET Framework 4.7 or later and 3.51 installed on the CIC Database Migration Assistant client computer. **For CIC 2015 R1 through 2018 R3 only,** ensure that you have Microsoft .NET Framework 4.5.2 or later and 3.5.1 installed on the CIC Database Migration Assistant client computer. There are known issues with the CIC Database Migration Assistant and the Oracle 11.2.0.3.0 and 11.2.0.4.0 clients. For this reason, we recommend installing CIC Database Migration Assistant on a separate computer from the one used for the 4.0 CIC database. See "Fulfill Microsoft .NET Framework requirements" in "Install CIC Database Migration Assistant" in the *CIC Migration Guide*.
❑	**Install CIC Database Migration Assistant package on CIC Database Migration Assistant client computer**

	Locate the CIC Database Migration Assistant `.msi` file, for example, `DBMigrationAssistant_2015_R2.msi`, on the Migration `.iso`. See "Install CIC Database Migration Assistant" in the *CIC Migration Guide*.

Checklist: Prepare for CIC database migration

At this point in the migration process, you should have already set up the CIC 4.0 database server, created a CIC 2015 R1 or later database as part of the CIC 4.0 server installation, created a client computer for the migration, and installed CIC Database Migration Assistant on the CIC Database Migration Assistant client computer.

❑	**Prepare the CIC Database Migration Assistant client computer** • **SQL Server** Install Microsoft SQL Server 2008 Management Studio • **Oracle** Install Oracle Administrator Client See "Prepare the CIC Database Migration Assistant client computer" in "Prepare for CIC Database Migration" in the *CIC Migration Guide*.
❑	**Upgrade the CIC 2.4/3.0 and CIC 2015 R1 or later database schema** Run a set of scripts to update the source and destination databases to the most recent (tested) database schema. • **SQL Server** o Upgrade the CIC 2.4/3.0 database schema to the most recent CIC 3.0 database schema o Run duplicate/null cleanup procedures on the CIC 2.4/IC 3.0 database o Upgrade the CIC 4.0 database schema to the most recent CIC 4.0 database schema • **Oracle** o Upgrade the CIC 2.4/3.0 database schema to the most recent CIC 3.0 database schema o Run duplicate/null cleanup procedures on the CIC 2.4/IC 3.0 database o Upgrade the CIC 4.0 database schema to the most recent CIC 4.0 database See "Upgrade the CIC 2.4/3.0 and CIC 2015 R1 or later database schema" in "Prepare for CIC Database Migration" in the *CIC Migration Guide*.
❑	**Prepare the CIC 3.0 and CIC 2015 R1 or later databases** Prepare the CIC databases for migration. • **SQL Server pre-migration procedures** 1. Modify the recovery mode for SQL Server 2. Run SQL Server migration check script

(SQL Server 2000) Run script to create the `sp_tables_info_rowset_64` stored procedure

3. Change the remote query timeout
4. Create a SQL Server migration user

See "SQL Server pre-migration procedures" in "Prepare for CIC Database Migration" in the *CIC Migration Guide*.

- **Oracle pre-migration procedures**

  1. Create data and index tablespaces
  2. Set authentication parameter
  3. Run Oracle migration check script
  4. Create an Oracle migration user

  See "Oracle pre-migration procedures" in "Prepare for CIC Database Migration" in the *CIC Migration Guide*.

- **Complete Interaction Tracker table group pre-migration procedures**

  1. Sync Tracer Configuration data on the source CIC server
  2. Migrate Tracker Configuration table group on the source CIC server

  See "Complete Interaction Tracker table group pre-migration procedures" in "Prepare for CIC Database Migration" in the *CIC Migration Guide*.

- **Change commit frequency**

  Change how often the inserts commit to the database during migration.

  See "Change commit frequency" in "Prepare for CIC Database Migration" in the *CIC Migration Guide*.

- **Review Interaction Optimizer considerations**

  See "Interaction Optimizer considerations" in "Prepare for CIC Database Migration" in the *CIC Migration Guide*.

❑

Prepare the CIC 3.0 and CIC 2015 R1 or later servers

Prepare the CIC 3.0 and CIC 2015 R1 or later servers for migration.

- Apply the recommended CIC 3.0 and CIC 2015 R1 or later Interaction Recorder ESs
- Stop Reporting, Recorder, and Tracker purge processes on CIC 3.0 and CIC 2015 R1 or later servers (highly recommended)

See "Prepare the CIC 3.0 and CIC 4.0 servers" in "Prepare for CIC Database Migration" in the *CIC Migration Guide*.

❑

If applicable, rescue orphaned recordings in Interaction Recorder

	Orphaned recordings don't migrate with CIC Database Migration Assistant. See "Rescue orphaned recordings in "Interaction Recorder" in "Prepare for CIC Database Migration" in the *CIC Migration Guide*.

Checklist: Migrate the CIC 3.0 database

❑	**About CIC Database Migration Assistant** CIC Database Migration Assistant checks database schema version, generates and runs customer script files, and tracks specified configuration data along with migrated data to assist with migrating multiple sets of data. See "How CIC Database Migration Assistant migrates the database" in "Migrate the CIC 3.0 Database" in the *CIC Migration Guide*.
❑	**Review database migration considerations** Review these considerations so that you can successfully tailor the CIC database migration for your implementation. • Migration scenarios • Incremental migrations • Optimizer table group considerations • Tracker Configuration table group considerations • Customized service levels • About the Migration scripts See "Migrate the CIC 3.0 Database" in the *CIC Migration Guide*.
❑	**Migrate the CIC 3.0 database using CIC Database Migration Assistant** Follow the step by step instructions to run CIC Database Migration Assistant on the CIC Database Migration Assistant client computer to migrate the CIC 3.0 database. If you use Interaction Dialer, run the Interaction Dialer Database Migration Assistant to migrate the Dialer 3.0 database later. See "Migrate the CIC 3.0 database" in the *CIC Migration Guide*.
❑	**Review CIC Database Migration Assistant troubleshooting information** • **Clean up scripts** CIC Database Migration Assistant runs clean up scripts to resolve errors that occur during the migration. If the cleanup scripts fail to run, contact PureConnect Customer Care. • If the migration fails, see **PureConnect KB article** to determine source data that didn't migrate. See "Troubleshooting the CIC Database Migration Assistant" in "Migrate the CIC 3.0 Database" in the *CIC Migration Guide*.
❑	**Complete CIC 2015 R1 or later database post-migration procedures**

	• Run post-migration check script • Restart Reporting, Recorder, and Tracker data purge processes on the CIC 4.0 server • Reapply Interaction Recorder Security Policies See "Complete CIC 2015 R1 or later database post-migration procedures" in "Migrate the CIC 3.0 Database" in the *CIC Migration Guide*.

Checklist: Prepare for Interaction Dialer database migration

For Interaction Dialer sites only.

It is critical that you run CIC Database Migration Assistant for Dialer:

- After running CIC Database Migration Assistant to migrate the CIC database
- Before importing CIC and Dialer configuration data using Interaction Migrator

❑	**Prepare the CIC Database Migration Assistant client computer** • Copy UDL folder and Dialer configuration file to the CIC Database Migration Assistant client computer. • (Oracle only) Configure TNS names on the CIC Database Migration Assistant client computer. See "Prepare the CIC Database Migration Assistant client computer for the Dialer database migration" in "Prepare for Interaction Dialer Database Migration" in the *CIC Migration Guide*.
❑	**Upgrade the Interaction Dialer 2015 R1 or later database schema** The Interaction Dialer 2015 R1 or later database schema upgraded when you upgraded the CIC 2015 R1 or later database schema. See "Upgrade the Interaction Dialer 2015 R1 or later database schema" in "Prepare for Interaction Dialer Database Migration" in the *CIC Migration Guide*.
❑	**Prepare the Interaction Dialer 3.0 and Interaction Dialer 2015 R1 or later databases** Prepare the Interaction Dialer databases for migration. You completed some of these tasks when you prepared the CIC 3.0 and CIC 2015 R1 or later databases for the migration. • **SQL Server pre-migration procedures** o Modify the recovery mode for SQL Server o Create a SQL Server user See "SQL pre-migration procedures" in "Prepare for Interaction Dialer Database Migration" in the *CIC Migration Guide*. • **Oracle pre-migration procedures** o Set the authentication parameter o Create an Oracle user o Configure Oracle TNS names/Net service names on the CIC server See "Oracle pre-migration procedures" in "Prepare for Interaction Dialer Database Migration" in the *CIC Migration Guide*. • **Cross platform migration procedures**

	PureConnect KB article for connecting an Oracle database to a SQL server database and vice versa. See "Cross platform data migration" in "Prepare for Interaction Dialer Database Migration" in the *CIC Migration Guide*.
❑	**Apply Dialer ESs to CIC 2015 R1 or later and CIC/ODS 2015 R1 or later servers** See "Apply Interaction Dialer ESs to CIC 2015 R1 or later and IC/ODS 2015 R1 or later servers" in "Prepare for Interaction Dialer Database Migration" in the *CIC Migration Guide*.

Checklist: Migrate the Interaction Dialer 2.4/3.0 database

For Interaction Dialer sites only.

Note: CIC Database Migration Assistant for Dialer migrates historical information only. Moving Dialer contact lists and updating Dialer campaigns is a post-migration procedure, described in this checklist.

❑	**Review Dialer database migration considerations** Review these considerations so that you can successfully tailor the Dialer database migration for your implementation: • Decide how to handle deleted workflows • Subdivide migration by workflow • Depending on filters selected, Dialer data may not migrate • Delete workflows that do not contain historical workflow tables See "Dialer database migration considerations" in "Migrate the Interaction Dialer 2.4/3.0 Database" in the *CIC Migration Guide*.
❑	**Migrate the Dialer 2.4/3.0 database using CIC Database Migration Assistant for Dialer** Follow the step by step instructions to run CIC Database Migration Assistant for Dialer on the CIC Database Migration Assistant client computer to migrate the CIC 3.0 database. Make sure that you are logged on as the same user that ran the CIC Database Migration Assistant to migrate the CIC database. See "Migrate the Dialer 2.4/3.0 database" in "Migrate the Interaction Dialer 2.4/3.0 Database" in the *CIC Migration Guide*.
❑	**If needed, review CIC Database Migration Assistant for Dialer troubleshooting information** If the migration fails, see PureConnect KB article to determine source data that didn't migrate. See "Troubleshooting the CIC Database Migration Assistant for Dialer" in "Migrate the Interaction Dialer 2.4/3.0 Database" in the *CIC Migration Guide*.
❑	**Complete Dialer 2015 R1 or later database post-migration procedures** • Run post-migration check script • (Recommended) See PureConnect KB article to move Dialer contact lists and update Dialer campaigns to point to new locations See "Complete Dialer database post-migration procedures" in "Migrate the Interaction Dialer 2.4/3.0 Database" in the *CIC Migration Guide*.

Migrate the configuration

Checklist: Import CIC 2.4/3.0 (and Dialer 2.4/3.0) configuration data

❑	**Before importing configuration data** Review the items that must have completed successfully before running Interaction Migrator to import the CIC (and Dialer) configuration data: • Initial run of IC Setup Assistant completed successfully on the *import* CIC 2015 R1 or later server. • CIC database migrated successfully using CIC Database Migration Assistant • (Interaction Dialer) Dialer database migrated successfully using CIC Database Migration Assistant for Dialer. • Verify that the Network Interface Card (NIC) or NIC team uses the same name on the new server as on the existing server. See "Before you run Interaction Migrator to import CIC 2.4/3.0 configuration data" in "Import CIC 2.4/3.0 Configuration Data" in the *CIC Migration Guide*.
❑	**Import CIC 2.4/3.0 (and Dialer 2.4/3.0) configuration data to CIC 2015 R1 or later server using Interaction Migrator** Follow the step by step instructions to run Interaction Migrator on the CIC 2015 R1 or later server to import the CIC 2.4/3.0 configuration data. Interaction Migrator imports Interaction Dialer 2.4/3.0 configuration data along with the CIC 2.4/3.0 configuration data. See "Run Interaction Migrator to import CIC 2.4/3.0 configuration data" in "Import CIC 2.4/3.0 Configuration Data" in the *CIC Migration Guide*.
❑	**Re-activate ACD email routing** Interaction Migrator set mail providers inactive during the import. Once the CIC 2015 R1 or later server is in full production, re-activate ACD Email Routing. See "Re-activate ACD email routing" in "Import CIC 2.4/3.0 Configuration Data" in the *CIC Migration Guide*.
❑	**Review migrated server parameters using the Server Parameter Query** Use the Server Parameter Query to query the migrated CIC 2.4/3.0 server parameters to determine which ones you need for CIC 2015 R1 or later and remove the ones you don't need. See "Review migrated server parameters" in "Import CIC 2.4/3.0 Configuration Data" in the *CIC Migration Guide*.
❑	**Complete handler post-migration procedures**

If you use custom handlers, follow the step by step handler post-migration procedures.

- Open and publish custom-written handlers
- Modify and publish 2015 R1 or later base handlers (including customization points)

See "Complete handler post-migration procedures" in "Migrate CIC 2.4/3.0 Handlers" in the *CIC Migration Guide*.

❑

Note change in default SIP transport protocol

Note that the default protocol is UDP.

See "Note change in default SIP transport protocol" in "Import CIC 2.4/3.0 Configuration Data" in the *CIC Migration Guide*.

❑

Complete Interaction Dialer post-migration procedures

Make sure that you reviewed the new features and changes in Interaction Dialer 2015 R1 or later in "Interaction Dialer" in "Migration Planning" in the *CIC Migration Guide*.

Complete the following Interaction Dialer post-migration procedures.

1. **Review migrated Dialer settings and complete post-migration procedures in Interaction Administrator**
    - Reconfigure Rules and Policy Sets
    - Configure Campaigns in a multiple ODS environment
    - Configure Time Zone Maps and assign them to campaigns, where applicable
    - Configure DNC sources and assign them to campaigns, where applicable
    - Configure maximum calls and call rate
    - Configure maximum lines per campaign
    - Enter Default Settings for Interaction Dialer containers

    See "Review migrated Dialer settings and complete post-migration procedures" in "Import CIC 2.4/3.0 Configuration Data" in the *CIC Migration Guide*.

2. **Configure new Dialer 2015 R1 or later features in Interaction Dialer Manager**
    - Review and modify wrap-up categories and codes
    - Confirm the `From` email field in Policy and Rule actions
    - Assign access and security rights
    - Assign a configurable priority number to campaigns for multiple campaigns

    See "Configure new Interaction Dialer 2015 R1 or later features in Interaction Dialer Manager" in "Import CIC 2.4/3.0 Configuration Data" in the *CIC Migration Guide*.

	3. Modify custom scripts for changes in Dialer 2015 R1 or later Custom Interaction Scripter scripts don't migrate and require modification by a programmer. See "Modify custom scripts for changes in Dialer 2015 R1 or later" in "Import CIC 2.4/3.0 Configuration Data" in the *CIC Migration Guide*. **4. Recreate Supervisor alerts for Dialer statistics in CIC Business Manager (Interaction Supervisor)** Interaction Supervisor alerts set up for Interaction Dialer statistics do not migrate; you have to recreate them. See "Recreate Supervisor alerts for Dialer statistics in CIC Business Manager" in "Import CIC 2.4/3.0 Configuration Data" in the *CIC Migration Guide*.

Checklist: Migrate CIC 3.0 managed IP phones

❑	**Review Polycom firmware requirements** Verify that your Polycom phones are running the appropriate firmware version in the Managed IP Phones container in Interaction Administrator. Review supported Polycom phone models and firmware. See: • "Polycom firmware requirements" in "Migrate CIC 3.0 Managed IP Phones" in the *CIC Migration Guide*. • "Additional configuration (Polycom)" in *CIC Managed Phones Administrator's Guide*.
❑	**Review the options for pointing the phones to the CIC 2015 R1 or later server** You can use the following methods to point the managed IP phones to the CIC 2015 R1 or later server: • DHCP custom option (recommended) • DNS Host (A) record • Manual configuration See "Options for pointing phones to the CIC 4.0 server" in "Migrate CIC 3.0 Managed IP Phones" in the *CIC Migration Guide*.
❑	**Point the phones to the CIC 2015 R1 or later server using DHCP custom option or other available options** Follow the step by step instructions to point the CIC 3.0 managed IP phones to the CIC 2015 R1 or later server using the recommended DHCP custom option (or one of the other options). **Important!** Complete the procedure only for the phones that you are ready to move. See "Point the phones to the CIC 2015 R1 or later server" in "Migrate CIC 3.0 Managed IP Phones" in the *CIC Migration Guide*.

Checklist: Migrate Interaction Media Server 3.0

❑	**Review Interaction Media Server 3.0 to 2015 R1 or later migration options** Review supported scenarios for upgrading existing Interaction Media Servers to Interaction Media Server 2015 R1 or later: • New Interaction Media Server 2015 R1 or later appliance • Existing Interaction Media Server G6 3.0 appliance upgraded to 2015 R1 or later • Existing Interaction Application Server (IAS) G7 or CIC Server G7 or 3.0 appliance used as Interaction Media Server See "Review Interaction Media Server 3.0 to 2015 R1 or later migration options" in "Migrate Interaction Media Server" in the *CIC Migration Guide*.
❑	**Fulfill Interaction Media Server migration requirements** Before migrating to Interaction Media Server 2015 R1 or later, ensure that you have fulfilled the licensing and other requirements. See "Before you begin the migration in Migrate Interaction Media Server" in the *CIC Migration Guide*.
❑	**Install Interaction Migrator on Interaction Media Server 3.0** Interaction Migrator exports and imports Interaction Media Server 3.0 certificate, configuration data, and resources to Interaction Media Server 2015 R1 or later. Follow the step by step instructions to install Interaction Migrator on the Interaction Media Server 3.0. See "Install Interaction Migrator 2015 R1 or later" in "Install Interaction Migrator" in the *CIC Migration Guide*.
❑	**Export Interaction Media Server 3.0 configuration data** Follow the step by step instructions to run Interaction Migrator on the Interaction Media Server 3.0 to export Interaction Media Server configuration data. See "Export Interaction Media Server 3.0 configuration data" in "Migrate Interaction Media Server" in the *CIC Migration Guide*.
❑	**Complete Interaction Media Server pre-migration procedures** Complete these tasks necessary for migrating Interaction Media Server: • **Copy stored recordings and update recordings storage path** - If you store Interaction Media Server 3.0 recordings locally • **Export SIP Proxy configuration and save to an external location** - If you use Interaction Media Server 3.0 as a SIP Proxy

	See "Complete Interaction Media Server pre-migration procedures" in "Migrate Interaction Media Server" in the *CIC Migration Guide*.
❑	**Install a new Interaction Media Server 4.0 or upgrade existing Interaction Media Server 3.0 appliance to 2015 R1 or later** **Important!** Determine the computer name to use when the server is running Interaction Media Server 2015 R1 or later. The migration process is simpler if you use the same name that the computer had when running Interaction Media Server 3.0. Follow the appropriate instructions for installing or upgrading to Interaction Media Server 2015 R1 or later for your implementation. • Install a new Interaction Media Server 2015 R1 or later • Upgrade existing Interaction Media Server G6 appliance to 4.0 • Upgrade existing Interaction Appliance (IAS) G7 or CIC Server G7 3.0 appliance used as Interaction Media Server to 2015 R1 or later See "Install or upgrade to Interaction Media Server 2015 R1 or later" in "Migrate Interaction Media Server" in the *CIC Migration Guide*.
❑	**Install Interaction Migrator on Interaction Media Server 4.0** Make sure that you installed the .NET Framework 3.5.1 on Interaction Media Server 2015 R1 or later. Follow the step by step instructions to install Interaction Migrator on the Interaction Media Server 3.0. See "Fulfill requirements for installing Interaction Migrator" and "Install Interaction Migrator" in "Install Interaction Migrator" in the *CIC Migration Guide*.
❑	**Import Interaction Media Server 3.0 configuration data** Follow the step by step instructions to run Interaction Migrator on the Interaction Media Server 4.0 to export Interaction Media Server 3.0 configuration data. See "Import Interaction Media Server 3.0 configuration data" in "Migrate Interaction Media Server" in the *CIC Migration Guide*.
❑	**Complete Interaction Media Server post-migration procedures** • If applicable, generate new certificates for CIC servers • Update recordings storage path in Interaction Recorder Policy Editor • Restore SIP Proxy configuration file to SIP Proxy Server install directory. Set up other applications from the Interaction Media Server 3.0 migration

	• Add CIC 2015 R1 or later server to Interaction Media Server See "Complete post-migration procedures" in "Migrate Interaction Media Server" in the *CIC Migration Guide*.

Migrate client workstations

Checklist: Complete workstation migration planning procedures

❑	**Review options for upgrading CIC 3.0 client workstation applications to CIC 2015 R1 or later** • Interactive Update (recommended) • Manual (`Setup.exe`) • Group Policy See "Options for upgrading CIC 3.0 client workstation applications" in "Workstation Migration Planning" in the *CIC Migration Guide*.
❑	**Review CIC 3.0 to CIC 2015 R1 or later client workstation upgrade installation information** • Migration/upgrade scenario is for same OS only • Previously install workstation applications are uninstalled • Previously installed localized workstation applications and language-related files and registry keys See "Options for upgrading CIC 3.0 client workstation applications" in "Workstation Migration Planning" in the *CIC Migration Guide*.
❑	**Fulfill CIC 2015 R1 or later client workstation hardware requirements** For running IC User Applications, CIC Business Manager Applications, and CIC Server Manager Applications. See "Client Workstation" in the *PureConnect Installation and Configuration Guide*.
❑	**Fulfill CIC 4.0 client workstation software requirements** For running IC User Applications, CIC Business Manager Applications, and CIC Server Manager Applications. See: • "CIC 2015 R1 or later client workstation software requirements" in "Workstation Migration Planning" in the *CIC Migration Guide*. • See "Client Workstation" in the *PureConnect Installation and Configuration Guide*.
❑	**Review changes to IC User Applications in CIC 2015 R1 or later** • 32-bit and 64-bit IC User Applications installs

	• Interaction Screen Recorder Capture Client and Interaction Fax 64-bit Print Driver installs included in IC User Applications installs See "Changes to IC User Applications in CIC 2015 R1 or later" in "Workstation Migration Planning" in the *CIC Migration Guide*.
❑	**Review how custom client settings are handled during the migration** • Custom client settings stored on the CIC server • Custom client settings stored on the workstation See "Changes to IC User Applications in CIC 2015 R1 or later" in "Workstation Migration Planning" in the *CIC Migration Guide*.
❑	**Review how localized client workstation applications are handled during the migration** See "Localized client workstation application upgrades" in "Workstation Migration Planning" in the *CIC Migration Guide*.
❑	**Review how Interaction Dialer client workstation application upgrades are handled during the migration** See "Interaction Dialer 2.4/3.0 client workstation application upgrades" in "Workstation Migration Planning" in the *CIC Migration Guide*.

Checklist: Migrate CIC 3.0 workstations using Interactive Update

Interactive Update is the recommended method for migrating CIC 3.0 workstations.

❑	**Fulfill required CIC and Interactive Update versions** It is crucial that you install the required CIC and Interactive Update Service Updates for these computers before the upgrade: • CIC 3.0 server • CIC 3.0 client workstation • CIC 2015 R1 or later server See "Required CIC and Interactive Update versions" in "Migrate CIC 3.0 Workstations Using Interactive Update" in the *CIC Migration Guide*.
❑	**Review Interactive Update Provider 1.0 and 2015 R1 or later settings** See "Interactive Update Provider settings" in "Migrate CIC 3.0 Workstations Using Interactive Update" in the *CIC Migration Guide*.
❑	**Review CIC 3.0 to CIC 2015 R1 or later migration client workstation migration summary** Summary of tasks performed on Interactive Update Provider 1.0 and Interactive Update Provider 2.0. See "CIC 3.0 to CIC 4.0 client workstation migration overview" in "Migrate CIC 3.0 Workstations Using Interactive Update" in the *CIC Migration Guide*.
❑	**Complete Part 1: Client workstation upgrade tasks on Interactive Update Provider 1.0** Follow the step by step instructions to: • Add the Interactive Update Client 2.0 as a new update, allow workstations to receive updates from Provider 2.0. • Create a *migration* computer group • Mark Interactive Update Client 2.0 install as GA and push out the migration computer group See "Part 1: Client workstation upgrade tasks on Interactive Update Provider 1.0" in "Migrate CIC 3.0 Workstations Using Interactive Update" in the *CIC Migration Guide*.
❑	**Complete Part 2: Client workstation upgrade tasks on Interactive Update Provider 2015 R1 or later** Follow the step by step instructions to: • Add the latest Interactive Update Client 3.0 SU on the CIC 2015 R1 or later server

	• Add the CIC 2015 R1 or later client workstation application installs as new updates • Add the Client Language Plugins as new updates • Mark the installs and SUs as GA and push out to client workstations See "Part 2: Client workstation upgrade tasks on Interactive Update Provider 2015 R1 or later" in "Migrate CIC 3.0 Workstations Using Interactive Update" in the *CIC Migration Guide*.

Checklist: Migrate CIC 3.0 workstations using Setup.exe

❑	**Review Setup.exe functionality** `Setup.exe` is available in each of the CIC client workstation application shares on the CIC 2015 R1 or later server. `Setup.exe` manually installs CIC client workstation applications on individual workstations. See "About Setup.exe" in "Migrate CIC 3.0 Workstations Using Setup.exe" in the *CIC Migration Guide*.
❑	**Upgrade IC User Applications using Setup.exe** • Fulfill IC User Applications (32-bit and 64-bit) requirements • Upgrade Interactive Update Client – Follow the step by step instructions • Upgrade IC User Applications – Follow the step by step instructions • Verify FQDN resolution to ensure client connectivity with host server See "IC User Applications (32-bit and 64-bit)" in "Migrate CIC 3.0 Workstations Using Setup.exe" in the *CIC Migration Guide*.
❑	**Upgrade CIC Business Manager Applications using Setup.exe** • Fulfill CIC Business Manager Applications requirements • Upgrade CIC Business Manager Applications • Verify FQDN resolution to ensure client connectivity with host server See "CIC Business Manager Applications" in "Migrate CIC 3.0 Workstations Using Setup.exe" in the *CIC Migration Guide*.
❑	**Upgrade CIC Server Manager Applications using Setup.exe** • Fulfill CIC Server Manager Applications (32-bit and 64-bit) requirements • Upgrade CIC Server Manager Applications • Verify FQDN resolution to ensure client connectivity with host server See "CIC Server Manager Applications" in "Migrate CIC 3.0 Workstations Using Setup.exe" in the *CIC Migration Guide*.

Migrate other products

Checklist: Migrate Interaction Conference

Existing Interaction Conference 3.0 systems must migrate to Interaction Conference 2015 R1 or later as part of the CIC 3.0 to 2015 R1 or later migration process.

❑	**Review Interaction Conference components to migrate** See: • "Interaction Conference architecture" in "Appendix D: Interaction Conference" in the *CIC Migration Guide*. • *Interaction Conference Administrator's Guide*.
❑	**Fulfill Interaction Conference migration requirements** Review Interaction Conference 3.0 and 4.0 server requirements See "Interaction Conference migration requirements" in "Appendix D: Interaction Conference" in the *CIC Migration Guide*.
❑	**Migrate Interaction Conference** • Run Interaction Migrator to export Interaction Conference 3.0 configuration data • Install Interaction Conference 2015 R1 or later • Run CIC Database Migration Assistant to migrate the Interaction Conference database • Change the Interaction Conference site ID • Run Interaction Migrator to import the Interaction Conference configuration data See: • "Migrate Interaction Conference" in "Appendix D: Interaction Conference" in the *CIC Migration Guide*. • *Interaction Conference Administrator's Guide*.

Checklist: Migrate Interaction Director

Note: Support for Interaction Director 2015 R1 or later is not currently available. Genesys has not updated this checklist.

Existing Interaction Director 2.4 systems must migrate to Interaction Director 4.0 as part of the CIC 3.0 to 4.0 migration process

❑	**Review Interaction Director components to migrate** See: • "Interaction Director client/server architecture" in "Appendix E: Interaction Conference" in the *CIC Migration Guide*. • *Director Monitored Server Installation and Configuration Guide*. • *Interaction Dialer Installation and Configuration Guide*.
❑	**Fulfill Interaction Director migration requirements** Review Interaction Director 2.4 and 4.0 server requirements See "Interaction Director migration requirements" in "Appendix E: Interaction Director Migration" in the *CIC Migration Guide*.
❑	**Migrate Interaction Director monitored servers** Run Interaction Migrator to migrate the Interaction Director configuration on each Interaction Director-monitored server in your implementation as part of the CIC 2.4/3.0 to CIC 4.0 migration process. See "Migrate Interaction Director monitored servers" in "Appendix E: Interaction Director Migration" in the *CIC Migration Guide*.
❑	**Migrate the Director server** • Run Interaction Migrator on the Interaction Director 2.4 server • Install Interaction Director 4.0 server • Run Interaction Migrator to export Interaction Director 2.4 configuration data • Run CIC Database Migration Assistant to migrate the Interaction Director database • Run Interaction Migrator to import the Interaction Director configuration data See: • "Migrate the Director server" in "Appendix E: Interaction Director Migration" in the *CIC Migration Guide*. • *Interaction Dialer Installation and Configuration Guide*.

Change Log

The following table lists the changes to this document since it's initial release.

Change	Date
Added link to "CIC 4.0 License Upgrade Guide" in the *Checklist: Complete migration planning procedures* section.	March 27, 2018
Added Microsoft .NET Framework 4.7 or later software requirement for PureConnect 2018 R4 or later.	June 14, 2018