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# Interaction Migrator

## Technical Reference

**Abstract**

Interaction Migrator is a versatile, version-independent utility that exports and imports configuration data related to the CIC server, Interaction Media Server, and other CIC components. You can use it as part of a migration from one CIC version to another, or for recovery and version control. This document describes how to install and use Interaction Migrator.

For the latest version of this document, see the PureConnect Documentation Library at: http://help.genesys.com/cic.

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# Introduction

Interaction Migrator is a version-independent utility that exports and imports configuration data related to the CIC server, Interaction Media Server, and other CIC components. You can use Interaction Migrator as part of a migration from one CIC version to another, or for recovery and version control.

Interaction Migrator is one of the tools included with the CIC 2.4/3.0 to CIC 2015 R1 or later migration package.

# New CIC distribution model

The CIC product suite has a new distribution model with new naming, faster release cycles, and higher quality. The new distribution model is based on the mainline continuous development of CIC 4.0, expressed in the 20## R# Patch# format. For more information, see the Product Information site at https://my.inin.com/products/cic/Pages/Releases-and-Patches.aspx.

> **Note:** For the purposes of this guide, CIC generally refers CIC 2015 R1 or later, acknowledging that it is based on the continuous development of CIC 4.0.

# When to use Interaction Migrator

This section provides the CIC and Interaction Media Server versions that Interaction Migrator supports for migrations and recovery.

## CIC server migrations

Interaction Migrator supports migrations for the following CIC versions:
- **CIC 2.4 to CIC 3.0**. You can use Interaction Migrator to migrate CIC configuration data and custom handlers from CIC 2.4 to CIC 3.0. For more information about planning for and implementing migrations, see CIC 2.4 to 3.0 Migrations in this document

- **CIC 2.4/3.0 to CIC 2015 R1 or later**. You can use Interaction Migrator to migrate CIC configuration data and custom handlers. However, the CIC 2015 R1 and later Microsoft Windows server operating system requirements make it necessary to migrate CIC configuration data from the existing CIC 2.4/3.0 server to a new CIC 2015 R1 or later server.

For more information about migrating from CIC 2.4/3.0 systems to CIC 2014 R1 or later systems, see the *CIC Migration Guide* on the **CIC 2.4/3.0 to CIC 2015 R1 or Later Migrations** page at https://my.inin.com/products/cic/Pages/Migrations.aspx.

## Interaction Media Server migrations

Interaction Migrator supports Interaction Media Server 3.0 to 2015 R1 or later migrations only. The Interaction Media Server operating system requirements make it preferable to use Interaction Migrator to migrate Interaction Media Server 3.0 configuration data to an Interaction Media Server 2015 R1 or later (either a new Interaction Media Server 2015 R1 or later, or an existing Interaction Media Server 3.0 appliance with an upgraded operating system).

For information about planning for and implementing Interaction Media Server 3.0 to Interaction Media Server 2015 R1 or later migrations, see Interaction Media Server 3.0 to Interaction Media Server 2015 R1 or later migrations in this document.

## CIC server recovery

You can use Interaction Migrator for recovery and version control on an existing CIC server. For example:
- Back up CIC configuration data for emergency recovery situations.
- Back up selected CIC configuration data like Interaction Attendant profile data or handlers for version control purposes.

Interaction Migrator supports recovery for the following CIC versions:
- CIC 2.4 to CIC 2.4
- CIC 3.0 to CIC 3.0
- CIC 2015 R1 or later to CIC 2015 R1 or later

## Interaction Media Server recovery

Interaction Migrator does not currently support recovery on an Interaction Media Server.

# Interaction Migrator and other PureConnect products

Currently, Interaction Migrator updates data on CIC servers and Interaction Media Servers only.

Do not attempt to export or import data to and from non-CIC servers or Interaction Media Servers with CIC product components or other PureConnect products installed, for example:

- Off-server Session Manager
- Interaction Recorder Remote Content Server
- ASR server
- Database server
- Mail server
- Web server
- Directory server
- Interaction Dialer Central Campaign (CCS) Server

# Interaction Migrator updates

Interaction Migrator updates with each CIC 2015 R1 or later release.

Check the **Interaction Migrator** page at https://my.inin.com/products/cic/Pages/Migrations.aspx to ensure that you are on the appropriate version for your migration.

> **Important!**
> To ensure that you download and install the appropriate version for your migration, see Install Interaction Migrator in this document.

If you already have Interaction Migrator installed, uninstall the current version and install the latest version.

> **Note:** Genesys no longer supports earlier versions of Interaction Migrator updated with CIC 3.0 SUs or CIC 4.0 SUs.

# Interaction Migrator directory

When you install Interaction Migrator on the CIC server or Interaction Media Server, the install creates a folder containing the Interaction Migrator executable and other files. The folder location is as follows:

| Server | Folder Location |
| --- | --- |
| CIC server | `\I3\IC\Migrator` |
| Interaction Media Server 3.0 | `C:\Program Files\Interactive Intelligence\Migrator` |
| Interaction Media Server 4.0 | `C:\Program Files (x86)\Interactive Intelligence\Migrator` |

# CIC server and Interaction Media Server configuration data files

When you run the Interaction Migrator export on a CIC server, you can select which CIC configuration data to export. Likewise, when you run the Interaction Migrator export on an Interaction Media Server, you can select which Interaction Media Server configuration data to export. The Interaction Migrator export puts the selected CIC or Interaction Media Server configuration data into a compressed file with an `.ininmigr` extension. In essence, it is a zip file, encrypted with other zip compression files within the main file.

The configuration data file name is unique. It consists of the server name combined with a date and time stamp, for example: `<Servername>_12062011091650.ininmigr`.

**Note:** You can append this file with ".zip" or another file compression utility so that anyone can open it with that utility. The configuration data file saves to a separate directory so as not to overwrite any existing data.

# Migration and Recovery modes

We recommend you stop CIC Service on the CIC server from which you are exporting CIC configuration data and then start Interaction Migrator from the executable file located in the `\I3\IC\Migrator` folder or from **Start->Programs->PureConnect->Interaction Migrator**. If you cannot stop **CIC Service**, the alternative is to run the Interaction Migrator Console version. For more information, see Interaction Migrator Console in this document.

When you import data using Interaction Migrator, it supports two modes:

- **Migration mode** (default) indicates that the data you are importing is from another server. Interaction Migrator can apply to the data various import rules built into the application.Use migration mode any time you are importing data from a server running a previous CIC or Interaction Media Server 3.0 or later version, or from a different machine name (for same version to same version migrations). Consider server name and site name changes when moving data from one server to another. Interaction Migrator changes the data at run time before it imports the data into the new server.

- **Recovery mode** indicates that the data imports as is; therefore, Interaction Migrator doesn't apply the various import rules. In Recovery mode, Interaction Migrator restores the data back to the way it was when you exported it; Interaction Migrator doesn't change the data at run time. Only use this mode to import data that you exported from a machine running the same CIC version.

> **Note:**
> Interaction Migrator doesn't support recovery mode for Interaction Media Server.

# How Interaction Migrator handles CIC server and Interaction Media Server configuration data in an import

When Interaction Migrator imports CIC or Interaction Media Server configuration data, it performs tasks for certain data components in addition to copying the files as it does during the export. This section describes what happens "behind the scenes" when Interaction Migrator imports data for certain data components.

> **Note:** For more information about migrating **CIC 2.4/3.0 systems** to **CIC 4.0 systems**, see the **CIC 2.4/3.0 to CIC 4.0 migration package** at https://my.inin.com/products/cic/Pages/Migrations.aspx. The CIC 2.4/3.0 to CIC 4.0 migration package includes the *CIC Migration Guide* and necessary tools to guide you through the migration process.

## CIC Migration and Recovery modes

Interaction Migrator performs the following actions when importing these data components in both Migration and Recovery modes:

- **Client Buttons** - When importing Client Buttons, Interaction Migrator copies the icon files over to the resources directory and sets the registry entry Valid Icon to "Yes" so that Interaction Administrator knows that the file imported already and resides in the resources folder.
- **Dial Plan Classifications** - When importing dial plan classifications, Interaction Migrator takes the values stored in the configuration key under the value Classifications and loops through them, checking to see if the value is already there. If the value is not there, Interaction Migrator creates it with the proper class name for the CIC release.

  > **Note: (CIC 2.4/3.0 to CIC 2015 R1 or later only)** Use the dial plan simulator to verify dialing patterns use proper lines as configured.

- **Reports** - When importing reports, Interaction Migrator conducts a file check to see if the reports are valid.If the .rpt file exists in the Report File Path on the server, Interaction Migrator assumes that the report is a **production report** and does not import the equivalent .rpt file from the CIC configuration data file.If the .rpt file *does not* exist in the Report File Path, Interaction Migrator assumes that the report is a **custom report**.Interaction Migrator retrieves the Report File Path value from the server parameter value stored in the Server Parameter container in Interaction Administrator.Typically, you set up this value during the CIC server installation.

  > **Note: (CIC 2.4/3.0 to CIC 2015 R1 or later only)** For custom reports developed using the standard database views that predefine CIC reports, test these reports after migrating the database. Many tables in the database schema have undergone significant changes. Despite these changes, the reporting views that exist in CIC 3.0 SU14 carry forward to CIC 2015 R1 or later. Interaction Migrator modifies the definitions of these views to present the reporting data in a compatible format. If custom reports directly reference tables in CIC 3.0, or customizations that include stored procedures directly reference tables in CIC 3.0, then you have to redevelop the reports.

# CIC Migration mode only

Interaction Migrator performs the following actions when importing these data components in Migration mode only:

- **Interaction Attendant** When importing Interaction Attendant profiles, Interaction Migrator checks the Active Attendant configuration and overwrites that configuration with the newly imported Attendant configuration data.

  > **Note**: If the import results in errors when opening Interaction Attendant, address these errors manually in Interaction Attendant, post-migration.

- **Server Parameters** When importing server parameters, Interaction Migrator adds the suffix "_migrated" to the original server parameters before updating them. **Make sure to take the following steps after the import**: 1) Review the values of each original and imported server parameter and decide which one you want to keep. 2) Delete the server parameter that you want to discard. 3) If you deleted the original, rename the "_migrated" parameter to the original name. 4) Manually rename any custom server parameters by removing the "_migrated" after you determine whether you need them.

  > **Note**: **(CIC 2.4/3.0 to CIC 4.0 only)** An interactive**Server Parameter Query** is available on the PureConnect Customer Care site at https://my.inin.com/products/selfhelp/migrationsto40/pages/server-parameter-query.aspx. The Server Parameter Query allows you to look up (query) a server parameter by name and see an explanation of what it does, along with ranges of valid values and deprecation information. Follow the instructions on the page.

- **IP Tables** When importing IP tables, Interaction Migrator appends "_migrated" to the original IP table names before updating them.
- **Users** When importing user data, Interaction Migrator adjusts the user's home site to the new value for the server on which Interaction Migrator is importing the data.Interaction Migrator also migrates the user status data to the new format, and moves that data to the Live Data registry key.
- **AudioCodes Firmware path** When importing AudioCodes firmware, Interaction Migrator checks to see if it is importing to a CIC 3.0 server, and if it is, updates the AudioCodes Firmware Path and AudioCodes UPCI Firmware path with the proper file name values.

  > **Note**: AudioCodes Firmware updates apply to **CIC 2.4 to CIC 3.0** migrations only.

# Database migration and recovery

Interaction Migrator exports and imports the Interaction Center database configuration settings if you selected the Data Sources component. However, Interaction Migrator does *not* update the database on the database server or reconfigure ODBC settings. The steps to update the database server depend on your migration or recovery scenario.

## CIC 2.4 to CIC 3.0 database migrations

For CIC 2.4 to CIC 3.0 database migrations, **run IC Setup Assistant immediately following the Interaction Migrator import** to upgrade the database and reset the CIC Data Sources and ODBC objects. IC Setup Assistant overrides any changes Interaction Migrator made.

For more information, see CIC 2.4 to CIC 3.0 Migrations in this document.

## CIC 2.4/3.0 to CIC 2015 R1 or later database migrations

In CIC 2015 R1 or later, changes to database schema plus new SQL Server and Oracle requirements make it necessary to migrate some or all the data from the existing database to a new CIC 2015 R1 or later database, instead of just upgrading the existing database.

> **Note**: Interaction Migrator doesn't migrate the default CIC prefaced data source connections in CIC 2.4/3.0 to CIC 2015 R1 or later. However, if you have custom data sources connected to CIC 2.4/3.0, you can migrate them to CIC 2015 R1 or later.

For CIC 2.4/3.0 to CIC 2015 R1 or later migrations, Interaction Migrator includes the **CIC Database Migration Assistant** in the CIC 2015 R1 or later migration package and moves data from a CIC 3.0 database to a CIC 2015 R1 or later database. As part of the migration process, **run CIC Database Migration Assistant before the Interaction Migrator import**.

The CIC Database Migration Assistant guides you through the process of migrating data in a CIC 3.0 database to a new CIC 2015 R1 or later database. It:
- Generates custom script files from the tables, date ranges, and site IDs that you specify.
- Includes a CIC Database Script Execution Tool to run the necessary script files.
- Tracks the specified configuration along with the migrated data to assist with migrating multiple sets of data.

> **Note**: XIC 2.4 systems migrating to CIC 2015 R1 or later must upgrade the database to CIC 3.0 before running CIC Database Migration Assistant.

For more information about migrating **CIC 2.4/3.0 systems to CIC 2015 R1 or later systems**, see the **CIC 2.4/3.0 to CIC 2015 R1 or later migration package** at https://my.inin.com/products/cic/Pages/Migrations.aspx. The migration package includes the *CIC Migration Guide* and necessary tools to guide you through the migration process.

## Same version to same version database migration or recovery

For same version database migrations (for example, a database migration from CIC 2015 R1 or later on one server to CIC 2015 R1 or later on a different server), **run IC Setup Assistant immediately following the Interaction Migrator import** to upgrade the database and reset the CIC Data Sources and ODBC objects. IC Setup Assistant overrides any changes Interaction Migrator made.

> - Same version to same version database migrations apply only to **CIC 3.0 to CIC 3.0 servers** and **CIC 2015 R1 or later to CIC 2015 R1 or later servers** only. The CIC server to which you import data must have a different name than the CIC server from which you export CIC configuration data.
> - CIC Migrator only migrates custom Data Sources; it does not migrate default Data Sources.

During same version database recoveries, Interaction Migrator recovers both default and custom Data Sources.

### Database recovery

There is no need to update the database or reconfigure ODBC settings in a recovery scenario.

# Language Packs

If you have CIC Language Packs installed on the "export" CIC server, Interaction Migrator migrates any localized custom Interaction Attendant wave files, handlers, and prompts.

# Tracing

Interaction Migrator uses the same tracing functionality as CIC. The Interaction Migrator install includes the trace configuration and log viewer utilities. The default output directory for the trace logs is the inin_tracing folder under the user's temp directory (%temp%\inin_tracing). Tracing is always on by default and it generates logs only when Interaction Migrator is running.

You can click **Zip and Email Logs** in the lower corner of the Interaction Migrator Welcome and Completed screens to send export or import logs to PureConnect Customer Care.

Tracing levels are at 100% by default; you can adjust them if necessary.

# CIC Service

The Interaction Migrator application requires you to stop the CIC Service when either importing or exporting CIC data. The import process can only run when the CIC Service isn't running. The export process can be processor intensive, so to avoid a Switchover or any call interruptions, stop the CIC Service. If you cannot schedule a system outage for your CIC system, there are two options:

- If you have a Switchover pair, you can stop CIC Service on the backup server and take the export from there.
- If you only have a single CIC server (no Switchover pair), you can run Interaction Migrator Console to perform your export. For more information, see Interaction Migrator Console in this document.

When performing imports on Switchover pairs, stop the CIC Service on both the primary and backup servers. Do not import configuration data on a backup server, even if you stopped the CIC Service, while the other CIC server is running. If you did, the backup CIC server would overwrite the imported data with the replicated data from the primary CIC server, or worse, leave the pair in an invalid state.

# Registry backup

By default, the **Interaction Migrator import creates a registry restore point**, which allows you to restore the registry to its original point before you ran the Interaction Migrator import. Interaction Migrator exports from the "HKLM\Software\Interactive Intelligence" key.

When you select the "Create registry restore point" option, Interaction Migrator performs a registry export of the *Interactive Intelligence* key in hive format. This file is in the folder where you installed Interaction Migrator and has a file name extension of ".hive."

# Structured parameters

If your CIC system includes **structured parameters created with the type "Secrets," you will need to reset the values after the import** in both Migration and Recovery modes. The reason is that these structured parameters are encrypted with a machine-specific key the Admin Server generated.

- For **migrations**, there is no way to either migrate this key or decrypt the parameters before exporting. You must reset the structured parameter values after the import.
- For **a backup/recovery operation** on the same machine where Interaction Migrator exported the parameters from, the values *may* work, but sometimes Admin Server can generate a new key. For this reason, it is best to reset the structured parameter values after the import.

# Encryption

Interaction Migrator encrypts the contents of export files using AES 256-bit encryption. AES256 encryption is PCI (Payment Card Industry) compliant.

# CIC 2.4 to CIC 3.0 Migrations

This section presents guidelines and considerations for CIC data migration from a CIC 2.3.x/2.4 server to a CIC 3.0 Server using Interaction Migrator.

## CIC data migration guidelines

You can use Interaction Migrator as part of a CIC upgrade installation when you require a new CIC server.

Here are some recommended CIC data migration guidelines for a CIC 2.4 to CIC 3.0 migration.

> **Note**: The CIC 3.0 SU 10 (New Patch Target) DVD replaces the CIC 3.0 GA DVD. For more information, see the Product Information site at https://my.inin.com/support/products/ic30/Pages/About-IC30-NPTSU10.aspx.

1. You can choose to **upgrade the CIC 2.4 database to CIC 3.0 separately**, before installing CIC 3.0 server and exporting/importing with Interaction Migrator, using the stand-alone **CIC Database Configuration utility** (in earlier CIC releases, called the Database Pre-Upgrade utility) available on the CIC 3.0 DVD.
2. With your CIC 2.4 production server still running, **install a new CIC 3.0 server with a "test" database and a limited number of test stations and users**. Complete the entire new CIC 3.0 installation procedure, and test basic CIC 3.0 functionality.
3. When you are comfortable with CIC 3.0 features and functionality, **decide which CIC 2.4 configuration data components you want to migrate** to CIC 3.0.
4. **Export the CIC 2.4 configuration data** on the CIC 2.4 production server with Interaction Migrator. We recommend that you export all the data.
5. After exporting the CIC configuration data file, **copy the file to a USB key or other writeable storage location.** Copy the file from that media to the CIC 3.0 server before importing. We recommend that you do not copy the file over the network.
6. **Import the CIC configuration data file** on the CIC 3.0 server with Interaction Migrator. When you import, you can select the data you want to import at the time. If wanted, you can import incrementally.
7. In Interaction Administrator, **determine which imported CIC 2.4 data components are appropriate for your CIC 3.0 system** and **perform** the necessary **post-migration configuration**.

   > **Note**: Genesys recommends completing steps 8 and 9 so that testing data doesn't mix with production data. Mixing test and production data causes inaccurate interaction reporting.

8. **Following the import, run IC Setup Assistant and select the Database task**. When you select the database, **point to the test database** created on the new CIC 3.0 server to perform further testing with the imported CIC 2.4 configuration data file. This testing is necessary because, if you selected to import CIC Data Sources, Interaction Migrator set the CIC Data Sources to point back to the CIC 2.4 ODBC settings. Rerunning IC Setup Assistant resets the CIC 3.0 Data Sources back to CIC 3.0 ODBC settings.
9. When you're ready to put CIC 3.0 into production, **rerun the IC Setup Assistant Database task again. Point to the 2.4 production database** (or the already upgraded production database set up before the CIC 3.0 server installation). Rerunning IC Setup Assistant upgrades the database and resets the CIC Data Sources and ODBC settings.
10. We recommend that you **move over to production on the CIC 3.0 server as quickly as possible** to ensure that the CIC configuration data is current. However, to avoid unnecessary system outages, make sure that you thoroughly test the imported data.

## Licensing

It is important to note that a **new or upgraded CIC server does not work correctly with a license file from an earlier CIC version**. For new and upgrade licensing instructions, see the License Management website at http://license.inin.com.

If you selected the Administrative data component, Interaction Migrator exports/imports the license allocation. However, **you might need to adjust license allocation post-migration** as CIC licensing changes with each release.

# Telephony configuration

After importing, redetect **the Telephony Resources** in Interaction Administrator.

If your telephony platform is Dialogic HMP, **there are differences in HMP licenses, depending on the HMP version**. Also note that adding/subtracting voice resources, IP resources, and fax resources can change the board and port configuration in Interaction Administrator.

**For SIP lines, verify that you set the network adapter correctly** for the new or upgraded CIC server in Interaction Administrator after importing. If it isn't correct, reset it and save the configuration.

Board and port configurations are different for each telephony environment. So, if you **plan to change the telephony platform** on a new CIC server, **re-create all lines, interfaces, and stations** in IC Setup Assistant, Interaction Administrator, or both. Do not export/import lines, stations, and interfaces with Interaction Migrator.

# Handlers

Interaction Migrator does not publish or manage custom handlers. Interaction Migrator places the handlers from the Interaction Migrator export into the designated extraction folder. Manually **publish and manage custom handlers post-migration**.

The IP\Handlers check box ties to the <Server Name>\IP check box. When you clear the IP\Handlers check box, the <Server Name>\IP check box clears automatically and is unavailable. When you select the IP/Handlers check box, Interaction Migrator selects the <Server Name>\IP check box automatically and enables it.

Also note that CIC base handlers change substantially in each release. Before you export/import with Interaction Migrator, **inventory each modified base handler** and **modify and publish the base handlers** on the new CIC server **post-migration**.

For the CIC release for detailed handler procedures, see the appropriate *Upgrade Guide*.

# Dial plan

Interaction Migrator copies the appropriate dial plan files and imports them along with the designated registry entries to restore the exported dial plan. Interaction Migrator does not perform a merge on the dial plan; it overwrites the existing entry. Therefore, **back up the dial plan before the import** to save any modifications.

# Interaction Attendant

When importing Interaction Attendant profiles to CIC 3.0, the default Attendant profile is overwritten with any imported profiles and nodes. If the configurations overwrite results in errors when opening Interaction Attendant, address these errors manually in Interaction Attendant, post-migration.

# Queue/IVR values

Genesys deprecated the line queue reporting and queue period statistics server parameters (**LineQueueReportingInterval** and **QueuePeriodStatisticsInterval**) in CIC 3.0 in favor of a **Report Configuration** tab on the **Server Configuration** dialog box. After using Interaction Migrator to import CIC 2.4 to 3.0 data, run IC Setup Assistant to move these parameters to their correct location.

# New and upgrade CIC installation documentation

The following installation documents are available on the Product Information site for CIC 2.4 and CIC 3.0:

- *New Installation Checklists*
- *Installation and Configuration Guide*
- *Upgrade Guide*

The *New Installation Checklists* and the more comprehensive *Installation and Configuration Guide* describe how to install and configure a new CIC server installation.

The *Upgrade Guide* describes how to upgrade an existing CIC server to a later CIC version. While this upgrade procedure is not the one you follow for your migration, the *Upgrade Guide* is useful for pre- and post-upgrade configuration needed for the specific CIC version. The *Upgrade Guide* also contains detailed procedures for planning and publishing/implementing base handler modifications, handler customizations, IVR functionality, and TUI changes.

You can find these installation documents in the **Installation and Configuration** section of the PureConnect Documentation Library on the Product site for the following CIC releases at:

**CIC 2.4**: https://my.inin.com/products/ic24/documentation/index.htm

**CIC 3.0**: https://my.inin.com/products/ic30/Documentation/index.htm

# CIC 2.4/3.0 to CIC 2015 R1 or Later Migrations

To move from **CIC 2.4/3.0 to CIC 2015 R1 or later, CIC server**, database and client workstation changes in CIC 2015 or later require a migration instead of an "in-place" upgrade.

- **CIC server**: The CIC 2015 R1 or later servers run on the Windows 2008 R2 or Windows 2012 R2 platform, making it necessary to migrate CIC configuration data from the existing CIC 2.4/3.0 server to a new CIC 2015 R1 or later server using Interaction Migrator.
- **CIC database**: Changes to the database schema in CIC 2015 R1 or later make it necessary to migrate some or all the data from the existing database to a new CIC database using CIC Database Migration Assistant instead of upgrading the existing database.

The **CIC 2.4/3.0 to CIC 2015 R1 or later migration package**, at https://my.inin.com/products/cic/Pages/Migrations.aspx, contains tools and documentation to guide you through the process of migrating existing CIC 2.4/3.0 systems to CIC 2015 R1 or later.

In addition, the CIC Migration Guide contains detailed instructions for running each of the migration tools.The CIC Migration Guide includes the following procedures:

- Install Interaction Migrator on the CIC 2.4/3.0 server
- Export CIC 2.4/3.0 configuration data using Interaction Migrator
- Prepare the CIC 2015 R1 or later server environment and install the CIC 2015 R1 or later server
- Install Interaction Migrator on the CIC 2015 R1 or later server
- Install the CIC Database Migration Assistant on the CIC Database Migration Assistant Client machine
- Upgrade the CIC 2.4/3.0 and CIC 2015 R1 or later database schema
- Prepare the CIC 3.0 and CIC 2015 R1 or later databases
- Prepare the CIC 3.0 and CIC 2015 R1 or later servers
- Migrate the CIC 3.0 database to the CIC 2015 R1 or later server
- Perform CIC 2015 R1 or later database post-migration procedures
- Import CIC 2.4/3.0 configuration data to the CIC 2015 R1 or later server

# Interaction Media Server 3.0 to Interaction Media Server 2015 R1 or Later Migrations

The initial release of the migration package supports migrating Interaction Media Server 3.0 configuration data to Interaction Media Server 2015 R1 or later in the following scenarios:

- 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 3.0appliance used as Interaction Media Server upgraded to 2015 R1 or later

Each scenario uses Interaction Migrator to export and import Interaction Media Server 3.0 certificate, configuration data, and resources to Interaction Media Server 2015 R1 or later. For the existing 3.0 Interaction Media Server appliances scenario, Interaction Migrator uses more utilities to upgrade the appliance to Interaction Media Server 2015 R1 or later.

A future migration package release will support migrating existing Interaction Media Server 3.0 appliances to 2015 R1 or later using an external USB key that automates the migration tasks.

For more information, 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. This page contains tools and documentation to guide you through the process of migrating Interaction Media Server 3.0systems to Interaction Media Server 2015 R1 or later systems.

**For sites with Interaction Media Server 2.4**

Existing Interaction Media Server G5 and G6 2.4 appliances meet the minimum hardware requirements to support Interaction Media Server 2015 R1 or later. However, there is no migration path for their configuration because Interaction Migrator does not support exporting Interaction Media Server 2.4 configuration.

The only upgrade path available is to wipe the server clean and follow the procedures outlined in theInteraction Media Server Technical Referencein the PureConnect Documentation Library to install a new "software only" Media Server, including reconfiguring the server manually.

# Install Interaction Migrator

This section describes Interaction Migrator requirements and installation.

## Requirements

For each CIC server and Interaction Media Server that you intend to export or import data as part of the migration, ensure that you installed the Microsoft .NET Framework version the CIC version supports.

- **PureConnect 2018 R4 or later and Interaction Media Server 2015 R1 or later** require Microsoft .NET Framework 4.7 or later and 3.5.1. For more information, see the PureConnect Documentation Library at https://help.genesys.com/cic/desktop/software_requirements.htm.
- **CIC 2015 R1 or later and Interaction Media Server 2015 R1 or later** require Microsoft .NET Framework 4.5.2 or later and 3.5.1. See the PureConnect Documentation Library at https://help.genesys.com/cic/desktop/software_requirements.htm.
- **CIC 3.0 and Interaction Media Server 3.0** require Microsoft .NET Framework 4.0. See the Product Information site at https://my.inin.com/products/ic30/Pages/Software-Requirements.aspx.
- **Pre-IC 3.0 versions** did not have a Microsoft .NET Framework requirement. For Interaction Migrator, ensure that you installed Microsoft .NET Framework 2.0 or later. No pre-Interaction Media Server 3.0 versions exist, so this bullet point doesn't apply to Interaction Media Server.

## Installation

Ensure that you download and install the appropriate version of Interaction Migrator from the Product Information site at https://my.inin.com/products/cic/Pages/Migrations.aspx.

Install Interaction Migrator on **each CIC server from which you want to export configuration data**. To migrate from:

- CIC 2.4/3.0 to CIC 2017 R1 or earlier, install Interaction Migrator 2017 R1 on the CIC 2.4/3.0 server to export CIC configuration data.
- CIC 2.4/3.0 to CIC 2017 R2 or later, install Interaction Migrator 2017 R1 on the CIC 2.4/3.0 server to export CIC configuration data.

Install Interaction Migrator on the CIC server to which you want to import exported configuration data. To migrate from:

- CIC 2.4/3.0 to CIC 2017 R1 or earlier, install Interaction Migrator 2017 R1 on the CIC 2017 R1 or earlier server to import CIC configuration data.
- CIC 2.4/3.0 to CIC 2017 R2 or later, install the latest version of Interaction Migrator on the CIC 2017 R2 or later server to import CIC configuration data.

Install Interaction Migrator on Interaction Media Server 3.0 and Interaction Media Server 2015 R1 or later. To migrate from Interaction Media Server 3.0 to Interaction Media Server 2017 R1 or earlier:
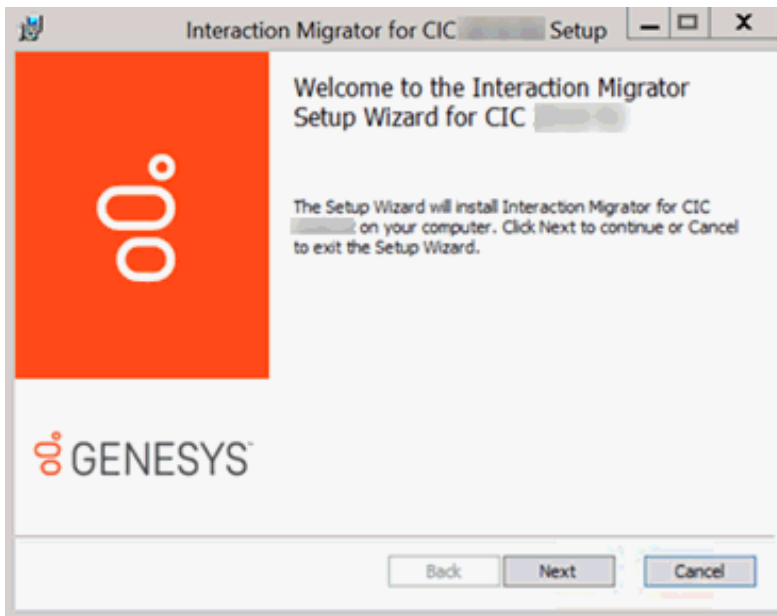
- Install Interaction Migrator 2017 R1 on the Interaction Media server 3.0 to export configuration data.
- Install Interaction Migrator 2017 R1 on the Interaction Media server 2017 R1 or earlier to import configuration data.

To migrate from Interaction Media Server 3.0 to Interaction Media Server 2017 R1 or later:

- Install Interaction Migrator 2017 R1 on the Interaction Media server 3.0 to export configuration data.
- Install the latest version of Interaction Migrator on the Interaction Media server 2017 R1 or earlier to import configuration data.
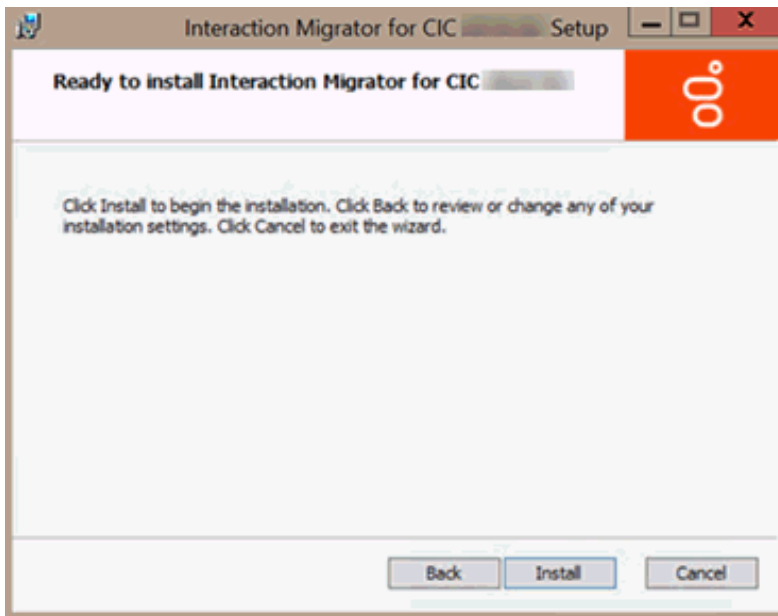
**To install Interaction Migrator**

1. Ensure that you have installed the appropriate Microsoft .NET Framework version on the CIC server or Interaction Media Server. If you didn't install Microsoft .NET Framework, the Interaction Migrator install prompts you to install it.
2. Open the **CIC 2.4/3.0 to CIC 2015 R1 or later migrations** page at https://my.inin.com/products/cic/Pages/Migrations.aspx.
3. Review any notes on this page.
   Make sure that you install the appropriate version of Interaction Migrator for your migration.
4. Download and copy the Migration .iso to a file server as described on the **CIC 2.4/3.0 to CIC 2015 R1 or later migrations** page at https://my.inin.com/products/cic/Pages/Migrations.aspx.
5. Locate the Interaction Migrator install `.msi` file (for example, `Migrator_2015_R2.msi`) on the Migration `.iso` and start the install.
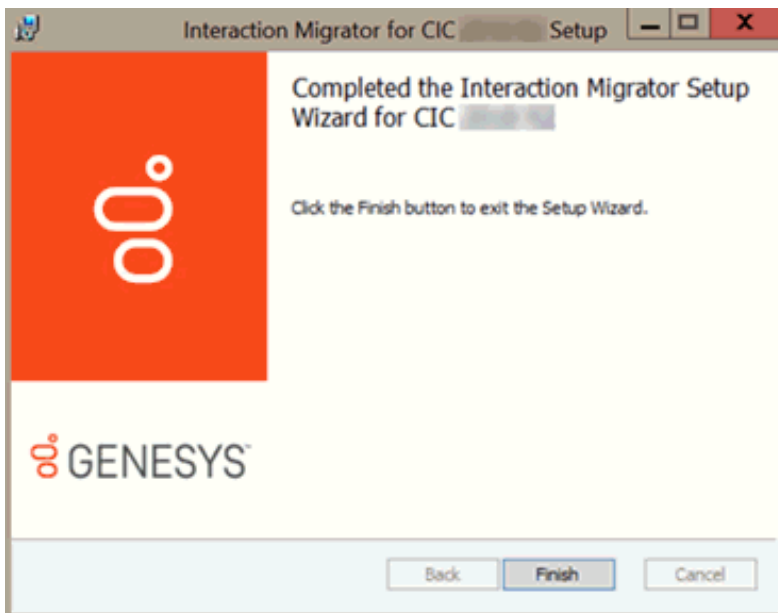6. On the **Welcome** page, click **Next**.

7. On the **Custom Setup** page, click **Next** to install Interaction Migrator. We recommend that you keep the default location.
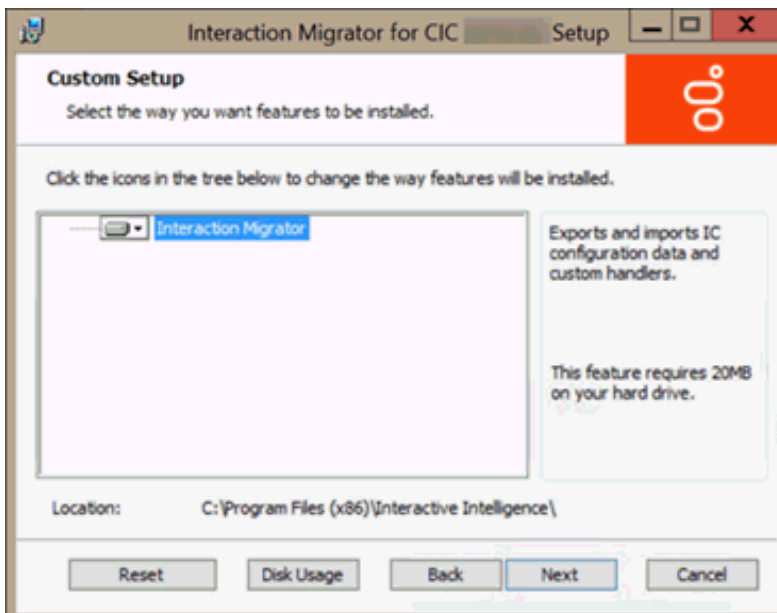


8. On the **Ready to Install Interaction Migrator** page, click **Install**.

9. When the installation is complete, click **Finish**.



The install places the Interaction Migrator executable file in the `\I3\IC\Migrator` folder and under **Start->Programs->Interactive Intelligence->Interaction Migrator**.

# Run Interaction Migrator to Export/Import CIC Configuration Data

This section provides instructions for exporting and importing CIC configuration data using Interaction Migrator. The procedures are the same for both migrations and recovery – the only distinction is that during an import, you select either **Migration Mode** or **Recovery Mode**.

## Before you run Interaction Migrator

If you are using Interaction Migrator as part of a migration—to export data from a CIC server and import it to a CIC server of a later version, for example, CIC 2.4 to CIC 3.0—review the appropriate Migrations sections in this document to learn about guidelines and considerations for CIC data migration.

### CIC Service

The Interaction Migrator application requires you to stop the CIC Service when either importing or exporting CIC data. The import process can only run when the CIC Service isn't running. The export process can be processor intensive, so to avoid a Switchover or any call interruptions, stop the CIC Service. If you cannot schedule a system outage for your CIC system, there are two options:

- If you have a Switchover pair, you can stop CIC Service on the backup server and take the export from there.
- If you only have a single CIC server (no Switchover pair), you can run Interaction Migrator Console to perform your export. For more information, see Interaction Migrator Console in this document.

When performing imports on Switchover pairs, stop the CIC Service on both the primary and backup servers. Do not import configuration data on a backup server, even if you stopped the CIC Service, while the other CIC server is running. If you did, the backup CIC server would overwrite the imported data with the replicated data from the primary CIC server, or worse, leave the pair in an invalid state.
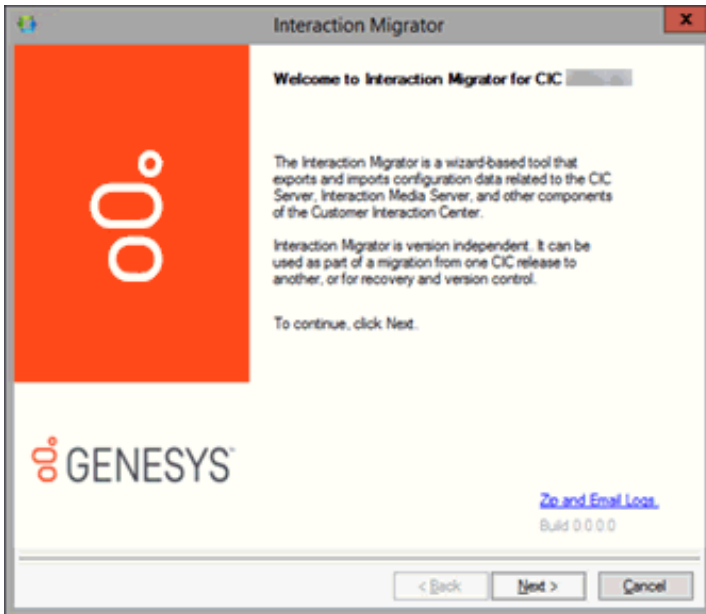
### CIC configuration data file

Genesys recommends that after you run the Interaction Migrator export, copy the CIC configuration data file to separate media (USB key or other writeable storage location) and store it in a safe location. To restore, import the CIC configuration data file with Interaction Migrator. Run the Interaction Migrator export frequently so that the data in the stored CIC configuration data file is up-to-date.

## Export CIC data

This section explains how to export CIC data from a CIC server using Interaction Migrator.
1. Stop CIC Service.
2. Start Interaction Migrator 4.0 on the **CIC server from which you want to export configuration data**, either from the Interaction Migrator executable file in the `\I3\IC\Migrator` folder, or from **Start->Programs->PureConnect->Interaction Migrator**.
3. On the **Welcome** page, click **Next**.

> **Note:** If you contact Genesys PureConnect Customer Care for migration assistance, provide them with the version number in the lower right corner of the dialog box.

4. On the **Task Selection** page, select **Export configuration data** and then click **Next**.
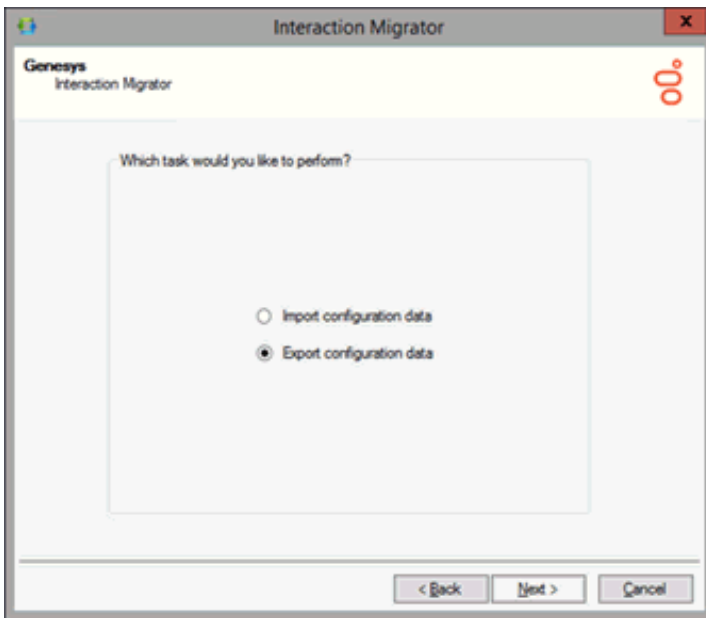


5. On the **Data Component Selection** page, ensure that **Select All** is selected (default) to export all data components and then click **Next**.

> **Note:** We recommend that you keep **Select All** selected (default) to export all data components. When you import the data, you can select which data components you want to import at the time.
>
> When you export users, you must also export workgroups so that workgroup memberships are exported.
>
> The data components listed differ depending on the CIC version installed on the CIC server.
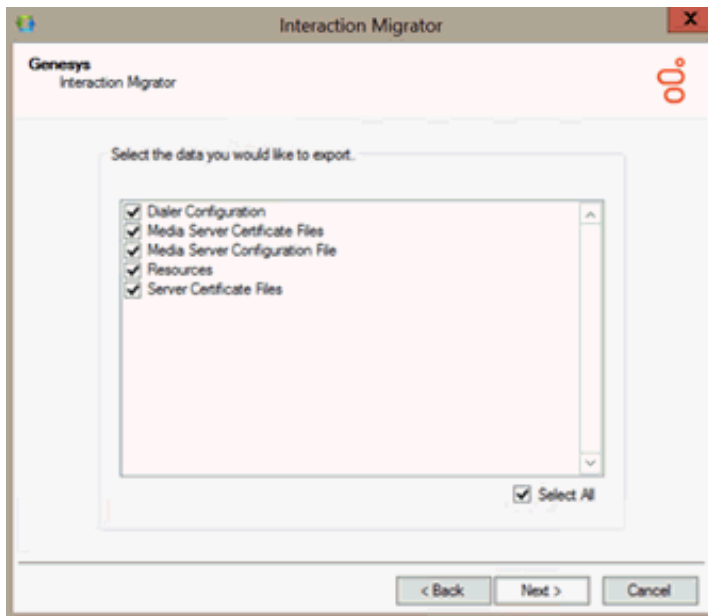
6. On the **Configuration** page, specify the directories for the exported data and custom handlers and then click **Next**.
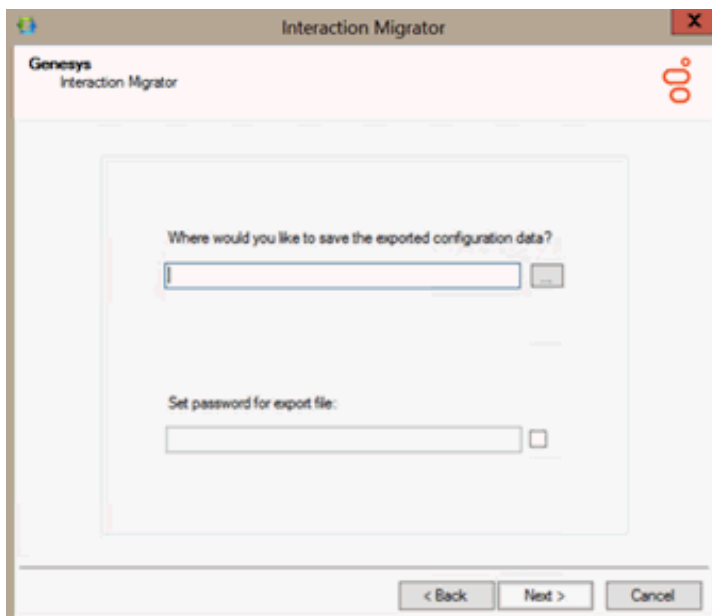


**Where would you like to save the exported configuration data?**

Open the folder where you want to save the exported data, for example, `D:\Temp\ExportData`.

Do **NOT** select the root directory of the drive where CIC is installed (for example, do not save to the root of `\I3\IC`).

**Browse to the location where you store your handler customizations**

Open the folder where the custom handlers are located. The CIC 4.0 install creates the `\I3\IC\Handlers\Custom` folder by default. You can use this folder or specify one you created yourself. All subdirectories are included in the migration.

**Set password for export file**

The password setting is optional. The default selection does not set the password; however, you can set a password since the export file could contain sensitive data. If so, click the check box to specify the password. There are no limitations for setting the password.

7. On the **Export Confirmation** page, confirm the selections and then click **Next** to start the export process.
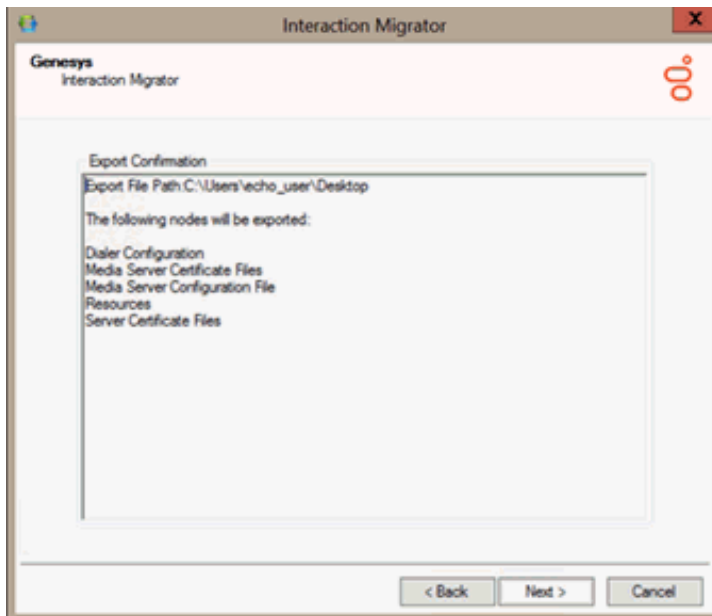


**Note:** To change any selections, click **Back** twice to return to the **Export Confirmation** dialog box. After you make your changes, start the export process again. A new CIC configuration data file is created.

The **Export Status** page displays real-time updates during the export process.
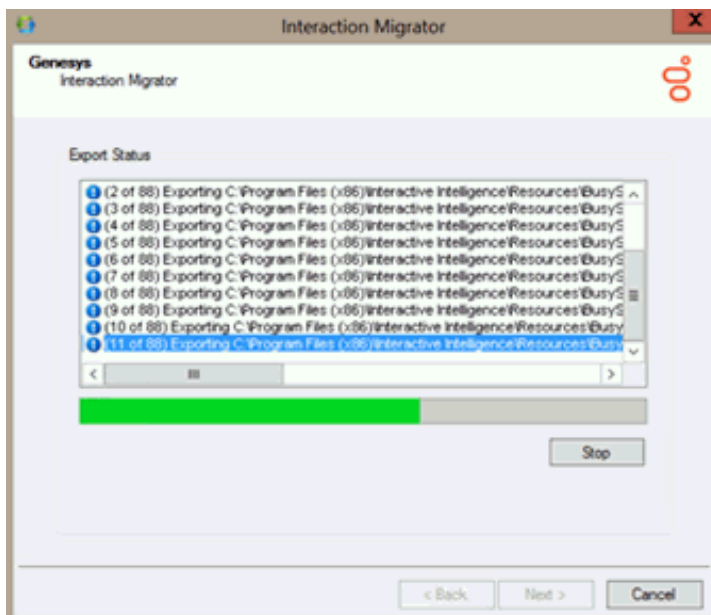


The export process can take several minutes depending on the amount of data being exported.

**Note:** Stop the process at any time by clicking **Stop**. After stopping the process, you can go back and change any selections without exiting Interaction Migrator.

8. When the export process is complete, the **Export Status** page displays the name and location of the CIC configuration data file, and how long the process took. Click **Next** to continue.
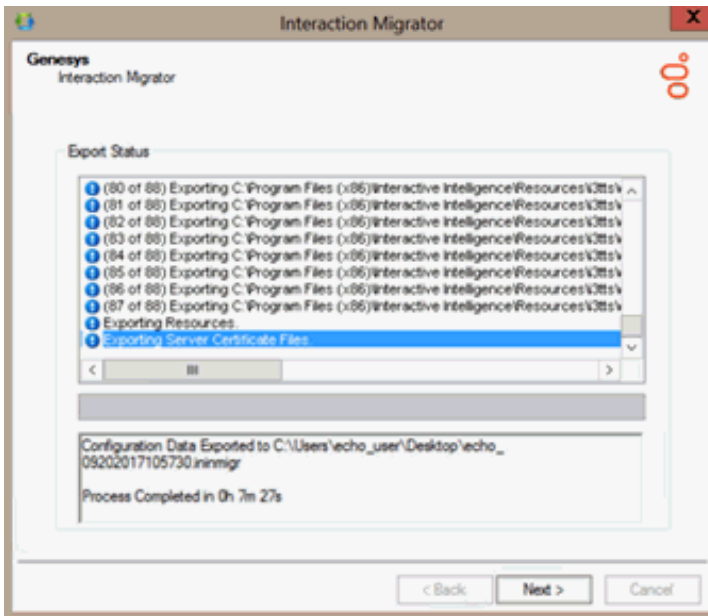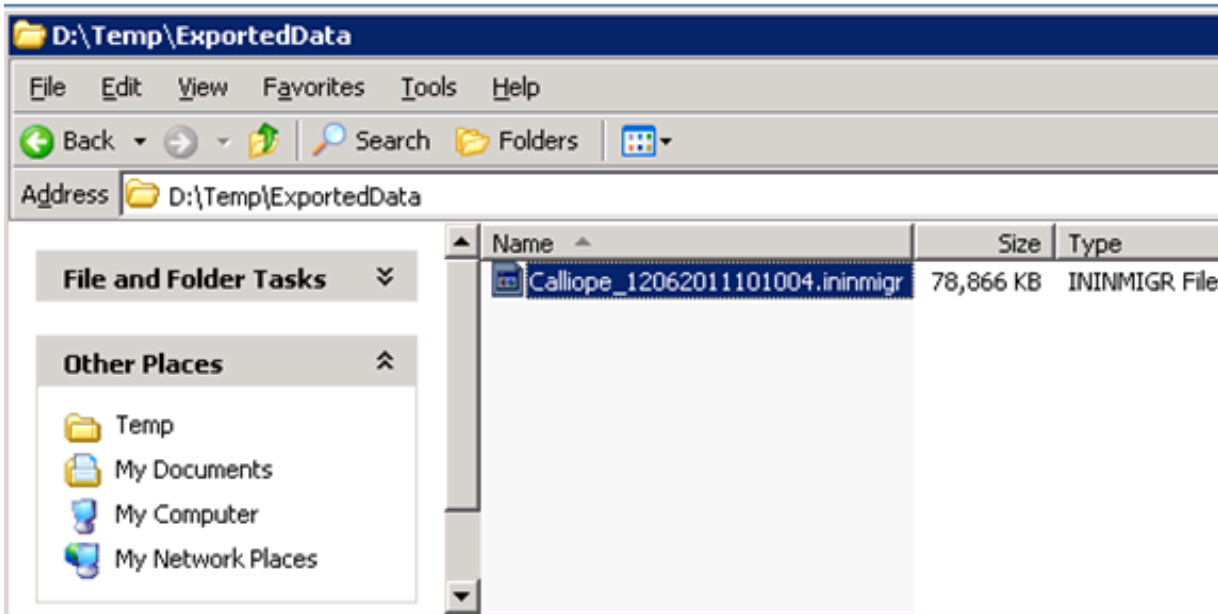
> **Note:** The CIC configuration data file name is unique. It consists of the server name combined with a date/time stamp. In this example, the CIC configuration data file is `Calliope_12062011101004.ininmigr`.If the migration doesn't complete successfully, multiple export files are created instead of the single `.ininmigr` file.

9. Click **Finish** to close Interaction Migrator and, if you stopped **CIC Service**, restart it.
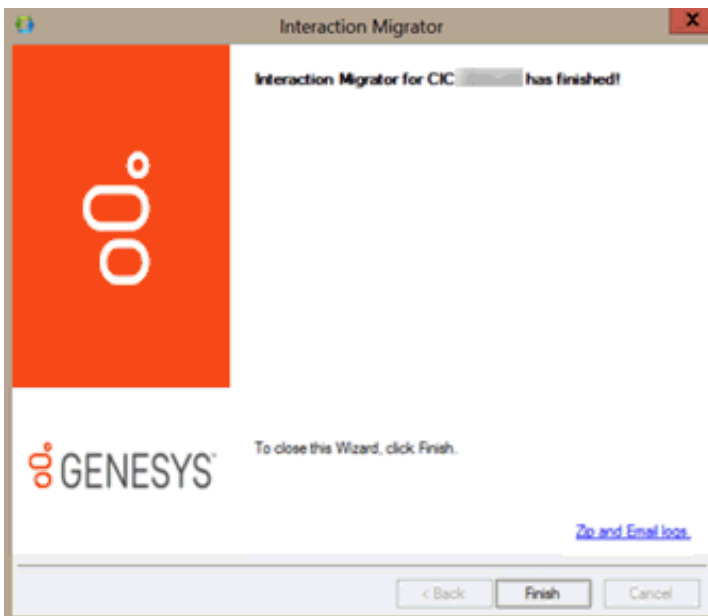


> **Note:** If you encountered issues during the export process, click **Zip and Email logs** to open Outlook and send a copy of the trace logs to Genesys PureConnect Customer Care.

10. To prepare for the import procedure, locate the **CIC configuration data file on the CIC server you exported from** and **copy the file to a USB key or other writeable storage location**.

We recommend this method of copying the CIC configuration data file to the installation media to make it easier to copy the file to the "import" CIC server.

# Import CIC data

Run Interaction Migrator to import the CIC configuration data file on either the same CIC server (Recovery mode) or another CIC server (Migration mode).

**Note:** For **CIC 2.4 to CIC 3.0** migrations, you may need to run IC Setup Assistant following the Interaction Migrator import to make database changes.

## Special notices

Before you run Interaction Migrator to import CIC data:

- **(CIC 2.4 to CIC 3.0 migrations only)** Make sure the initial run of IC Setup Assistant successfully completed on the "import" CIC server as part of your migration or recovery scenario.

- **(CIC 2.4/3.0 to CIC 2015 R1 or later migrations only)** Make sure the CIC Database Migration Assistant successfully migrated data from a CIC 3.0 database to a new CIC 2015 R1 or later database as part of your migration scenario.

  For more information about migrating from CIC 2.4/3.0 systems to CIC 2015 R1 or later systems, see the *CIC Migration Guide* on the **CIC 2.4/3.0 to 2015 R1 or Later Migrations** page at https://my.inin.com/products/cic/Pages/Migrations.aspx.

- Make sure that you are using the appropriate version of Interaction Migrator. See Install Interaction Migrator in this document.
- You must stop the CIC Service when importing CIC data. If you cannot stop CIC Service, the alternative is to run Interaction Migrator Console. For more information, see Interaction Migrator Console in this document.

- Log on to the "import" CIC server using the same domain user account under which to run the CIC Service. That is, the same CIC administrator account you ran IC Setup Assistant as part your migration or recovery scenario.

## Import methods

When performing an import in Migration Mode, Interaction Migrator imports the information based on the type of data (for example, DS entries or file-based items). This section describes the different methods Interaction Migrator uses to import data.

> **Note:** These import methods apply to both **CIC 2.4 to CIC 3.0 migrations** and **CIC 2.4/3.0 to CIC 2015 R1 or later migrations** unless otherwise indicated in the description.

### DS Entries - Overwrite Mode

When Interaction Migrator imports the following items, Interaction Migrator overwrites any existing items that are already present on the target server. For example, if you export User A from a CIC 3.0 server and import User A to a CIC 2015 R1 or later server that already has a User A, any User Properties that are in the import overwrite those properties that exist on the CIC 2015 R1 or later server. So, if you changed User A's extension to "1234" on the CIC 2015 R1 or later server and then performed an import where User A's extension is "4567" on the CIC 3.0 server, after the import is complete User A's extension is "4567. "

Any new properties that you added to the item on the CIC 2015 R1 or later server remain unchanged. If you gave a user new security rights on the CIC 2015 R1 or later server, those rights don't change during the import process.

This type of migration applies to every class type except for the following items. For these items, the system performs special processing to prevent merge conflicts.
- Server Parameters — The system appends "_migrated" to the parameter name to prevent collisions.
- DNIS Mappings — The system merges the routing table with any existing mappings to prevent deletion of any mappings.
- Handlers — The system does not import Handlers because they get recreated during the install.
- CIC Data Sources —The system does not import default Data Sources.

### File based items - Overwrite Mode

If a file exists on the server when importing file-based items, usually the system does not overwrite the file. The following items are cases where the system does overwrite the existing file:
- LRA Configuration file
- Dial Plan files

## Related Items

The following items have interdependencies. If you choose to export any of these items, their interdependent items export also to prevent an invalid configuration after the import.
- **AdminConfig** — This item contains all of the license assignments. If you choose to export AdminConfig, the system selects Users and Workstations so license assignments don't import to Users/Stations that don't exist on the CIC 2015 R1 or later server.

  > **Note**: If you are not also importing at the same time, or have not already imported, the Tracker Config data, **do not** import the AdminConfig file. The AdminConfig file pulls in User data so importing it without the Tracker Config data causes problems with the Tracker Config data.

- **IPA** — If you choose to export this item, the system selects all of the other IPA-related items. If you don't import all the IPA configuration settings, IPA won't work after the import.

  > **Note**: Interaction Migrator does not support IPA migration in the initial CIC 2.4/3.0 to CIC 2015 R1 or later migration package release.

- **IP\Handlers** — If you choose to export this item, the system selects `<SERVER>\IP`. Conversely, if you select `<SERVER>\IP`, the system selects `IP\Handlers`. Export these items together so that the Handlers function properly after the import.
- **IP Phones** — If you choose to export IP Phones, the system selects IP Phone Proxy Groups. Export these items together to allow the IP Phones to function properly after the import.
- **Interaction Recorder Master Key File** — If you choose to export the Interaction Recorder Master Key File, the system selects Interaction Recorder. Export these items together to allow Interaction Recorder to function properly after the import.

## Run Interaction Migrator to import CIC data

1. Copy the **exported CIC configuration data file** from your storage media to a location on the **"import" CIC server**. For example, copy the file to `D:\Temp\ImportData`.

   **Important!**

   Do **NOT** copy the file to the root directory of the drive where CIC is installed (for example, do not copy to the root of `\I3\IC`) as critical files are overwritten).

2. Log on to the **"import" CIC server** using the same domain user account under which to run CIC Service. The account is the same CIC administrator account used when you ran IC Setup Assistant as part your migration scenario.

3. **Stop CIC Service** on the "import" CIC server. Interaction Migrator requires you to stop **CIC Service** when importing CIC data.

4. Start Interaction Migrator, either from the Interaction Migrator executable file in the `\I3\IC\Migrator` folder, or from **Start->Programs->PureConnect->Interaction Migrator**.

5. On the **Welcome** page, click **Next**.
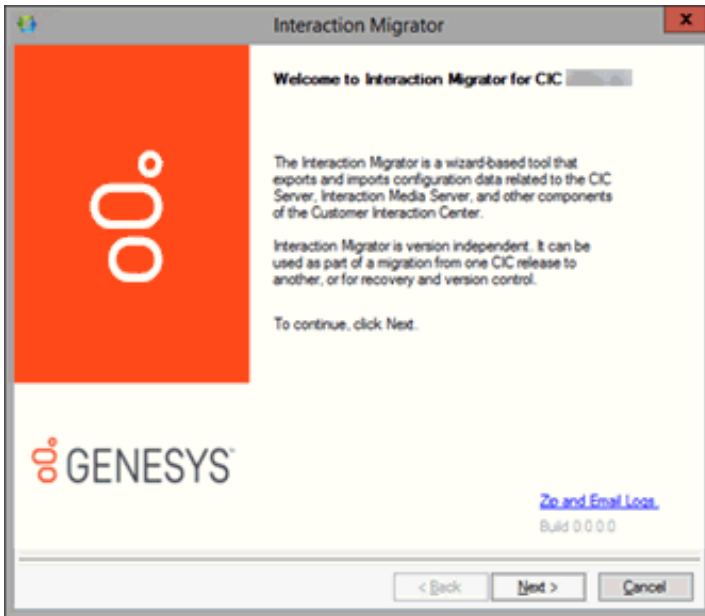
   

   If you contact PureConnect Customer Care for migration assistance, provide them with the version number in the lower right corner of the dialog box.

6. On the **Task Selection** page, select **Import configuration data** and then click **Next**.
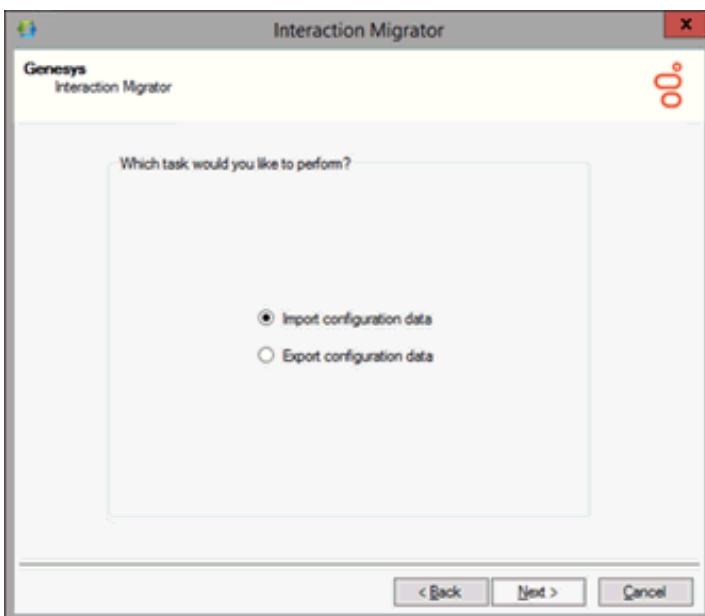
   

7. On the **Configuration** page, specify the **location of the exported CIC configuration data zip file** and the **folder to which to extract the CIC configuration data file**. Select either **Migration Mode** or **Recovery Mode**.
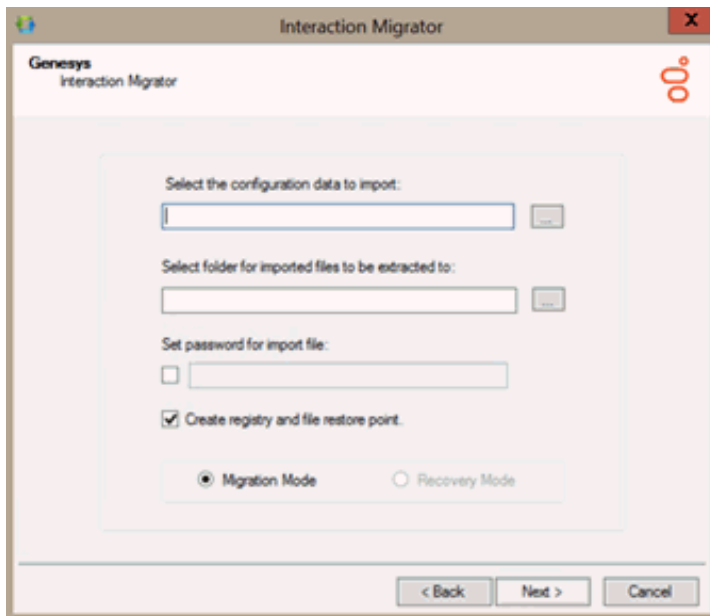
**Select the configuration data to import**

> Browse to the location of the exported CIC configuration data file (for example,
> `Calliope_12062011101004.ininmigr`) on the USB key or other writeable storage location.

**Select folder to which to extract imported files**

> Browse to the destination directory for the extracted CIC configuration data file. For example, extract the data to
> `D:\Temp\ImportData`.
>
> **Important!**
>
> Do **NOT** copy the file to the root directory of the drive where you installed CIC (for example, do not copy to the root of
> `\I3\IC`) as critical files are overwritten.

**Set password for export file**

> If you set a password on the CIC configuration data file, select the check box and type the password. If not, leave this
> box empty.

**Create registry and file restore point**

> Interaction Migrator creates a registry restore point for restoring the registry back to the point before Interaction
> Migrator was run to import the CIC configuration data. When you select this option, Interaction Migrator performs a
> registry export of the `Interactive Intelligence` key in hive format. This file is in the `\I3\IC\Migrator` folder
> and has a file name extension of `.hive`.
>
> We recommend that you keep the default setting.

**Migration Mode**

> In Migration mode, when moving data from one server to another, consider any server name and site name changes.
> Interaction Migrator changes the data at run time before importing it into the new server.

**Recovery Mode**

> In recovery mode, Interaction Migrator restores the data to its pre-import values. Interaction Migrator doesn't change
> the data at run time.

8. Click **Next**. The following rules apply, depending on the mode you selected:

**Migration Mode**:

- You **cannot** import a configuration data file created using an older version of Interaction Migrator. However, you **can** import
  a configuration data file created using the same version of Interaction Migrator but an older build number.
- You can import to a CIC 2015 R1 or later server a configuration file that was exported from a CIC 2.4/3.0 server.

**Recovery Mode**:

- You **cannot** import a configuration data file created using an older version of Interaction Migrator.
- You **cannot** import a configuration file created using the same version of Interaction Migrator but an older build number.
- You **cannot** import to a CIC 2015 R1 or later server a configuration file exported from a CIC 2.4/3.0 server. You can only
  export/import the same CIC versions.

9. After Interaction Migrator loads the CIC configuration data file and extracts the data, in the **Import Items** page, select the components to import and then click **Next**.
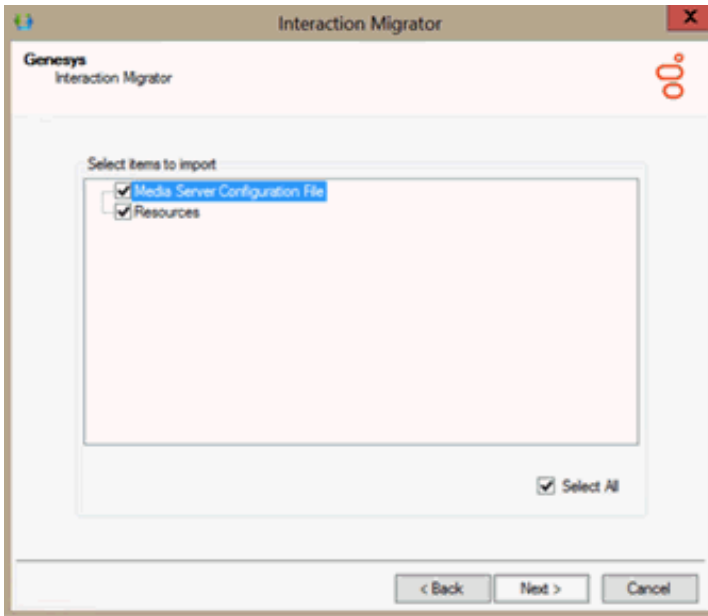


> **Notes:**
> - **(CIC 2.4 to CIC 3.0 migrations and same version to same version migrations only)** Interaction Migrator does not import CIC Data Source components as it would overwrite the CIC configuration.
> - **(CIC 2.4/3.0 to CIC 2105 R1 or later migrations only)** If you chose **Migrate Mode**, make sure that you migrated the Tracker database using CIC Database Migration Assistant before you proceed with the import. If you import data before migrating the Tracker database, the result is duplicate entries with different ID keys, and historical reports that don't run correctly.

10. On the **Import Confirmation** page, confirm the selections and then click **Next** to start the import process.
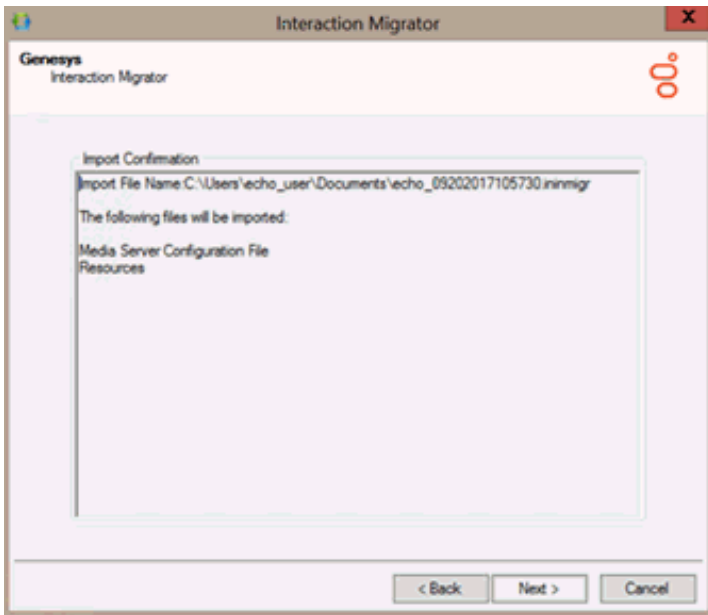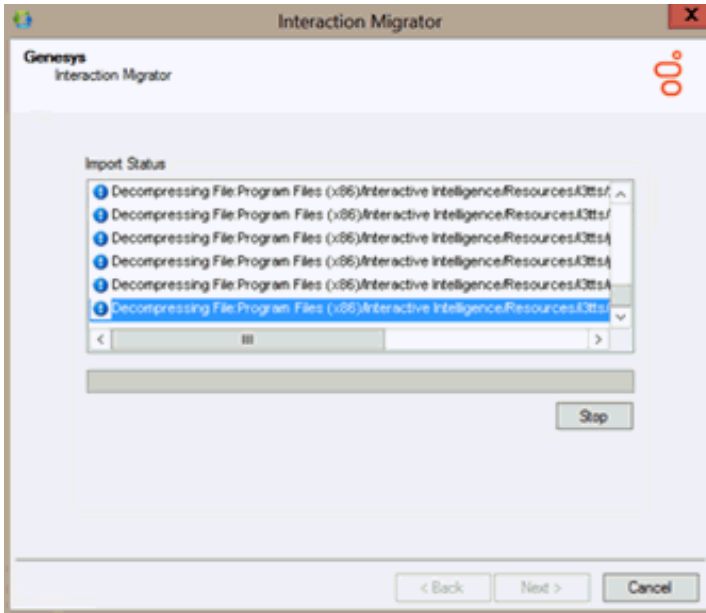


11. **(CIC 2.4 to CIC 3.0 migrations only)** Right before the import process completes, the following message appears:
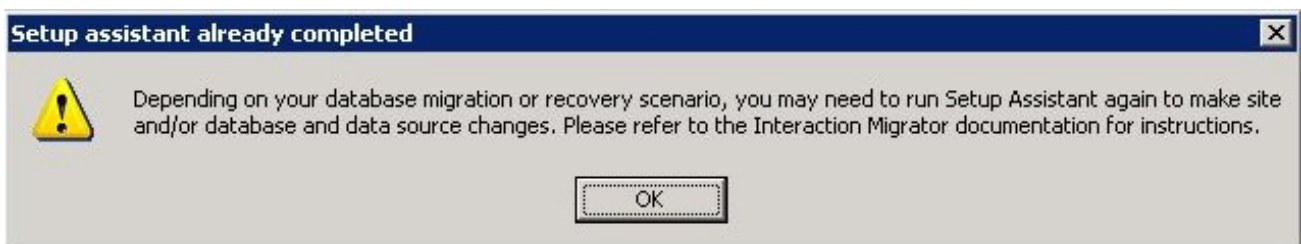
If your migration or recovery scenario requires it, rerun Setup Assistant after Interaction Migrator completes, as described in the next section.

12. Click **OK** to continue. The **Import Status** page displays real-time updates during the import process.



The import process can take several minutes depending on the amount of data to export.

> **Note:**
> You can stop the process at any time by clicking **Stop**. After stopping the process, you can go back and change any selections without exiting Interaction Migrator.

13. When the import process is complete, the **Import Status** page displays when the import completed and how long the process took. Click **Next** to continue.
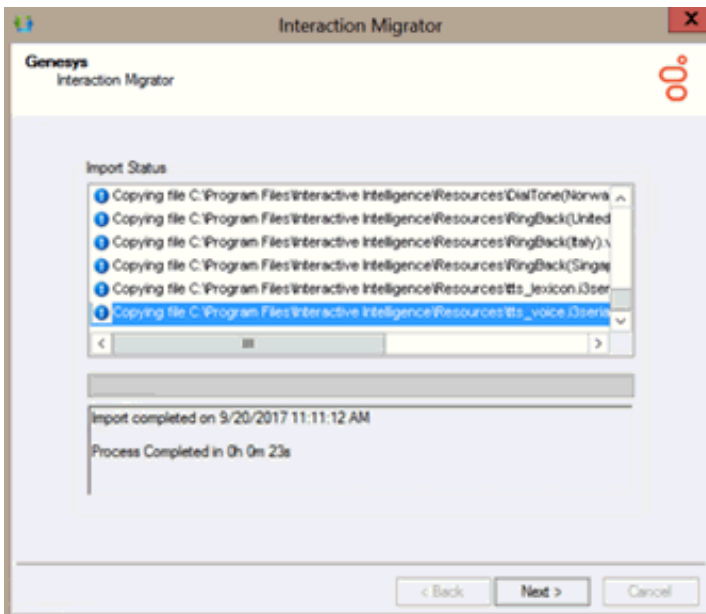


14. Click **Finish** to close Interaction Migrator and restart IC Service.

> **Notes:**
> - If you encountered problems during the import process, click **Zip and Email logs** to open Outlook and send a copy of the logs to PureConnect Customer Care.
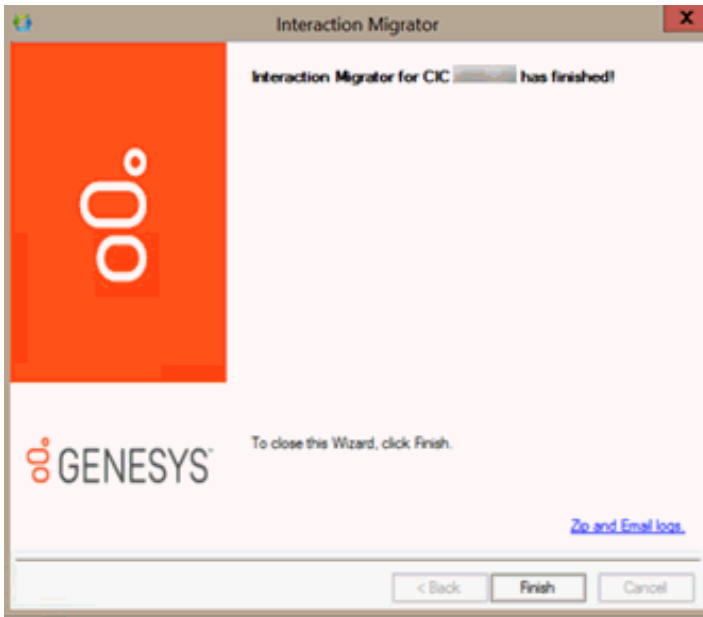> - The naming convention for the "base" languages changed to a single element (for example, `fr-fr` is now just `fr`). If you imported Interaction Attendant Data, the import renamed the language folders in the `InteractionAttendantWaves` folder to reflect the new naming convention.

## Run IC Setup Assistant to make database changes

Interaction Migrator exports and imports the CIC Database Configuration settings if you selected the Data Sources component. However, Interaction Migrator does *not* update the database on the database server or reconfigure ODBC settings.

### Migration or recovery scenarios that require database changes in IC Setup Assistant

Run IC Setup Assistant following the Interaction Migrator import to upgrade the database and rest the CIC Data Sources and ODBC objects if you are:

- Importing **CIC 2.4 data to a CIC 3.0 server**.
- Importing from **one CIC version on one server to the same CIC version** on a different server.

IC Setup Assistant overrides any changes Interaction Migrator made. Follow the instructions in this section.

### Migration or recovery scenarios that DO NOT require database changes in IC Setup Assistant

Do not run IC Setup Assistant following the Interaction Migrator import if you:

- Imported **CIC 2.4/3.0 data to a CIC 2015 R1 or later server**. The CIC 4.0 Migration package includes a CIC Database Migration Assistant. As part of the migration process, you run CIC Database Migration Assistant before the Interaction Migrator import.

  For more information about migrating from CIC 2.4/3.0 systems to CIC 2015 R1 or later systems, see the *CIC Migration Guide* on the **CIC 2.4/3.0 to CIC 2015 R1 or Later Migrations** page at https://my.inin.com/products/cic/Pages/Migrations.aspx
- Imported data in a recovery scenario. There is no need to update the database or reconfigure ODBC settings.

For more information, see Database Migration and Recovery in this document.

### Modify database configuration in IC Setup Assistant

**To make database changes in IC Setup Assistant:**
1. Start IC Setup Assistant from the CIC server desktop by selecting **Start->Programs->PureConnect->IC Setup Assistant**. The "rerun" Setup Assistant **Welcome** page appears, showing the tasks allowed in a rerun.

2. Select the **Database** option.
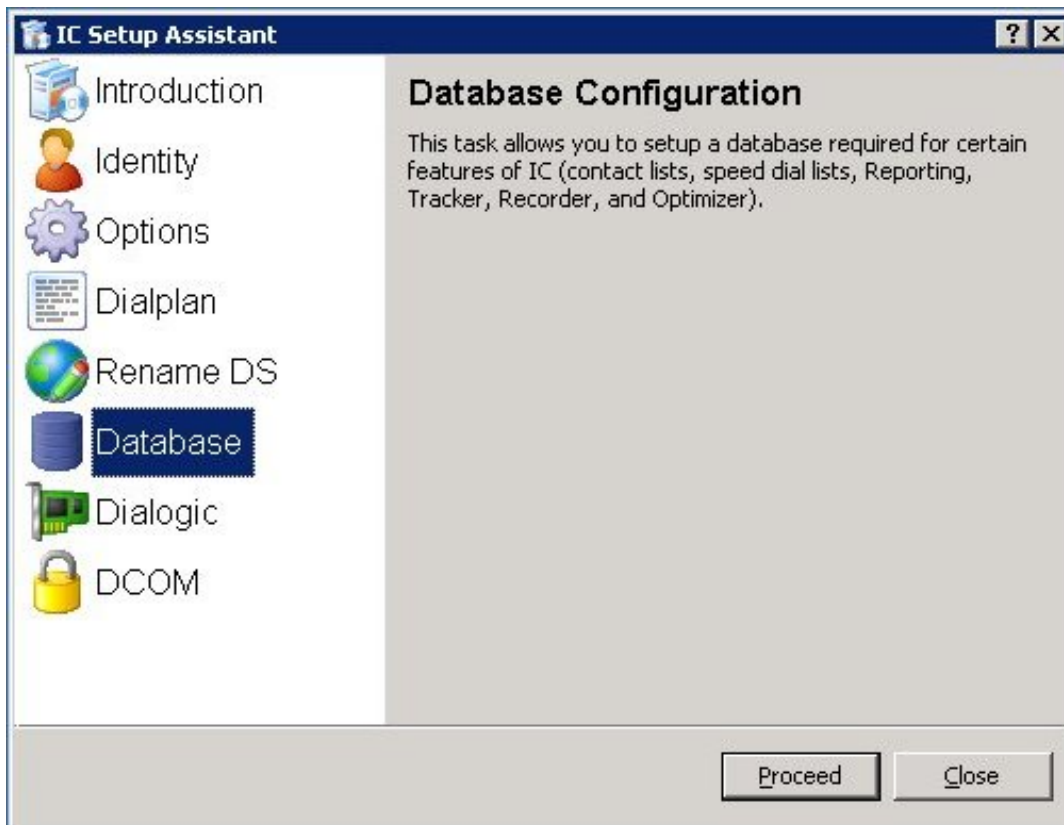


3. On the **Select a Reporting Option** page, select **Store all reporting data in a database**.
4. On the **Database Configuration** page, select the database you want to configure: **Microsoft SQL Server** or **Oracle**. This example is for Microsoft SQL Server.
5. On the **Select the Microsoft SQL Server** page, select the SQL Server that hosts the CIC database for the CIC server you imported the CIC configuration data file to. Type the appropriate database administrator account and password.
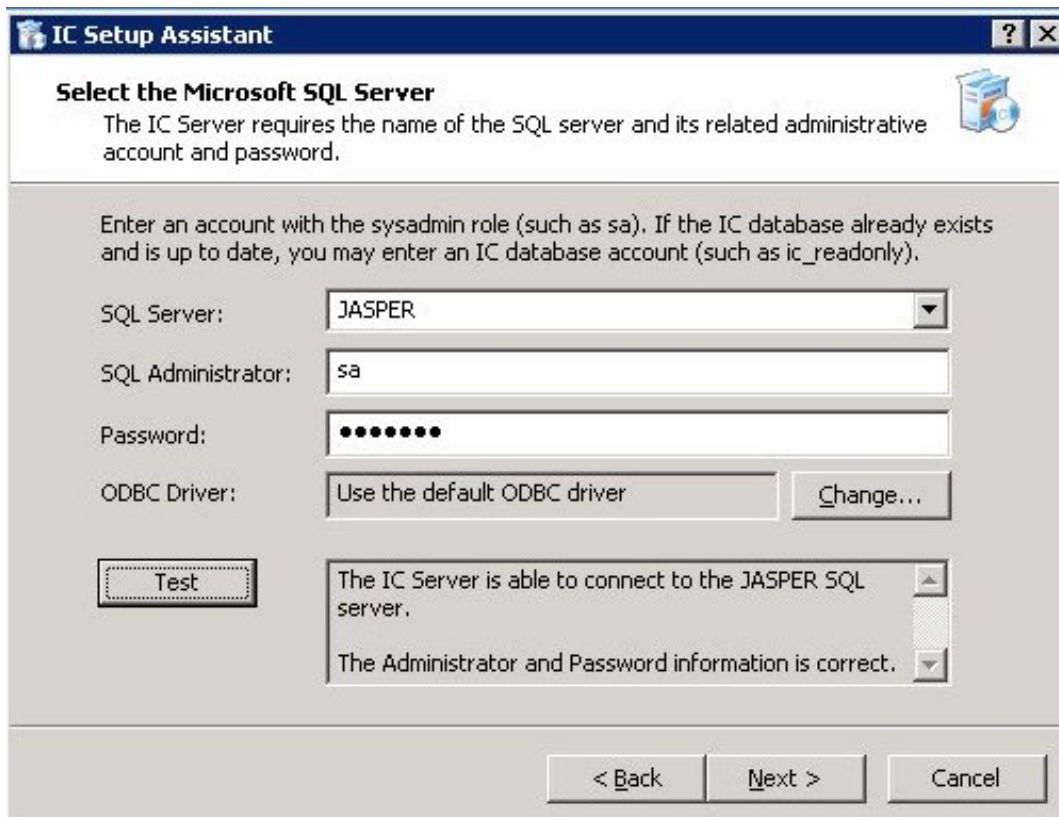


6. On the **Configure the CIC Database Name** page, select the option applicable to your migration scenario.
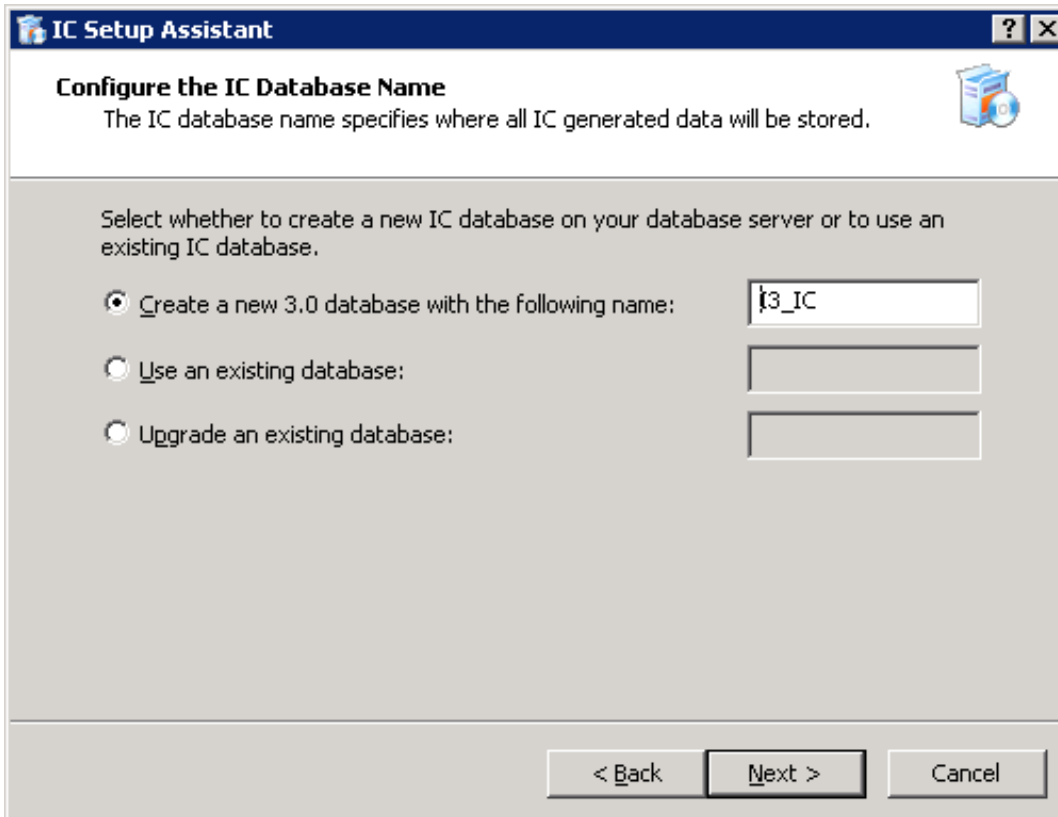
**Recovery:**

> Select **Use and existing database.**

**Migration:**

> We recommend that you test the 3.0 server with the imported 2.4 configuration data before moving over to production. Select one of the following options:
>
> - If you do *not* want to mix test data and production data, click **Use an existing database** and type the test 3.0 database name.
>
> **Note:**
> After testing is complete and before moving over to production, rerun Setup Assistant again and this time point to the (upgraded) 2.4 database.
>
> - If you have already upgraded the 2.4 database, click **Use an existing database** and type the 2.4 database name.
> - If you have not upgraded the 2.4 database, click **Upgrade an existing database**name.

7. On the **Configure the SQL Database CIC Accounts** page, type the passwords for the **IC_Admin**, **IC_User**, and **IC_ReadOnly** accounts.
8. Commit your choices.
9. When **IC Setup Assistant** completes the configuration, restart your computer.

# Interaction Migrator Console

When you install Interaction Migrator, it installs an MS-DOS Console version of Interaction Migrator, `ININ.Migrator.Console.exe`, in the same folder. (For more information about the location, see Interaction Migrator directory in this document.) Interaction Migrator Console uses command-line switches to perform the CIC server and Interaction Media Server configuration data export and import.

Partners and customers can use Interaction Migrator Console to automate and customize the export and import process to fit their business needs.

## Special notices for a CIC migration

Before you run Interaction Migrator Console:

- **(CIC 2.4 to CIC 3.0 migrations only) Make sure that the initial run of IC Setup Assistant has** completed successfully on the "import" CIC server as part of your migration or recovery scenario.
- **(CIC 2.4/3.0 to CIC 2015 R1 or later migrations only)** Ensure that the CIC Database Migration Assistant has completed successfully to migrate data in a CIC 3.0 database to a new CIC 2015 R1 or later database as part of your migration scenario.

- When running Interaction Migrator Console to **export** data as part of your migration or recovery scenario, **you don't have to stop the CIC Service**. However, keep in mind that the export process is processor-intensive and can cause issues on a running production system. Run Interaction Migrator Console when system usage is at the absolute lowest point.
- When running Interaction Migrator Console to **import** data as part of your migration or recovery scenario, **you must restart the CIC Service** after the import to implement the changes.

## Task Scheduler

**(CIC 2.4/3.0 to CIC 2015 R1 or later migrations only)** If you have User Access Control (UAC) enabled on your CIC 4.0 server and you use a scheduled task to run Interaction Migrator Console, configure the scheduled task to run with highest permissions. To configure the scheduled task, click **Start** -> **Administrative Tools** -> **Task Scheduler**. Edit or create a scheduled task and on the **General** tab, click **Run with highest privileges**.

# Command-line options

This table describes the command-line options for Interaction Migrator Console.

| Command-line option | Description |
|---|---|
| **-export** | **Run Interaction Migrator in export mode.** |
| -exportNodes | A comma-delimited list of nodes to export from the server. Example: `exportNodes="IP Phones,Lines"`. To export all the data, set this parameter to `'all'`. |
| -customHandlerPath | Full path to the location of the custom handlers for the system. |
| -exportFolder | Full path to where to create the export file. |
| -password | To assign a password to the CIC or Interaction Media Server configuration data file, provide a value for this parameter. If you don't require a password, disregard this option. |
| -noprompt | By default, the console prompts for a keystroke to continue. To begin the export process with no user interaction, use this option. If you use this option, Interaction Migrator skips the Dialer package creator. |
| **-import** | **Run Interaction Migrator in import mode.** |
| -importfile | Name and full path of file to import. This file has an `.ininmigr` extension. If there are spaces in the file path, enclose the value in double quotes. |
| -importNodes | A comma-delimited list of the nodes to import from the CIC or Interaction Media Server configuration data file. To import everything that is in the file, set this value to `'all'`. |
| -extractionfolder | Full path to where to extract the import files to. |
| -password | If the import file has a password, use this parameter. If not, disregard this option. |
| -importmode | If running in Migration mode, set this parameter to 0. If running in Recovery mode, set this value to 1. |
| -noprompt | By default the console prompts for a keystroke to continue. To begin the import process with no user interaction, use this option. If you use this option, Interaction Migrator skips the Dialer package creator. |
| -devMode | If migrating Interaction Recorder to a development environment, use this option to prevent the import of the Recordings Rescue ID attribute key. If not, disregard this option. |

# Sample configurations

Here are some sample Interaction Migrator Console configurations.

Export all nodes with no user interaction (with password)

```
ININ.Migrator.Console -export -exportfolder="d:\temp" -exportNodes="all" -customHandlerPath="d:\customHandlers" -
password=foo  noprompt
```

## Export users and workgroups

```
ININ.Migrator.Console -export -exportfolder="d:\temp" -exportNodes="users,workgroups" -
customHandlerPath="d:\customHandlers"  noprompt
```

## Import all nodes from export file (with password)

```
ININ.Migrator.Console -import -importfile="d:\temp\foo_030320071919.ininmigr" -importNodes="all" -
extractionFolder="d:\Temp\MyImportFolder" -password="1234"  noprompt
```

# Appendix A: Interaction Migrator sample scenarios (CIC2.4 to CIC 3.0 only)

Interaction Migrator is a powerful and flexible tool. It is important to know when it is and is not advisable to use it. This appendix presents several sample upgrade and recovery scenarios for which we recommend using Interaction Migrator.

> **Note:** The samples outlined in this appendix apply only to **CIC 2.4 to CIC 3.0** upgrade and recovery scenarios, not to **CIC 2.4/3.0 to CIC 2015 R1 or later migrations** or **Interaction Media Server 3.0 to Interaction Media Server 2015 R1 or later migrations**. For more information about migrating from CIC 2.4/3.0 systems to CIC 2015 R1 or later systems, see the *CIC Migration Guide* on the **CIC 2.4/3.0 to 2015 R1 or Later Migrations** page at https://my.inin.com/products/cic/Pages/Migrations.aspx.

The scenarios presented in this appendix are general overviews; they don't supply all the information required for an implementation.

- Simple upgrade
- Upgrade with TDM to Dialogic HMP architecture change
- Third server disaster recovery site
- Upgrade with OS change

## Simple upgrade

This *simple upgrade* scenario describes upgrading a CIC 2.4 server with Dialogic HMP to CIC 3.0. The operating system is already Windows 2003.

The best way to perform this upgrade is to run a CIC 3.0 Server upgrade installation on the existing system. The CIC server upgrade installation is still the best tool to use here and Interaction Migrator by no means replaces it. (You can run Interaction Migrator in Recovery mode to back up your configuration.) The steps are:

1. Make a full system backup (and make sure you can restore it) using your usual server backup procedures.
2. Run the Interaction Migrator to export (back up) the existing CIC 2.4 configuration.
3. Follow the standard CIC 3.0 upgrade installation procedures as documented in *CIC Upgrade Guide*.

   Once the CIC 3.0 upgrade install finishes, your work is complete.

   If, for example, all the stations in Interaction Administrator somehow deleted because of a problem in the upgrade installation, you could run Interaction Migrator, import in Migration mode (since you'll pull 2.4 exported data into your 3.0 server), and select to import only the stations back onto the server.

## Upgrade with TDM to Dialogic HMP architecture change

In this scenario, a CIC 2.3.1 TDM system is upgrading to CIC 3.0 and is changing to Dialogic HMP, and moving to a Windows 2003 OS. The steps are:

1. Run Interaction Migrator on the old CIC 2.3.1 Server to export the existing configuration.
2. Bring your new CIC server online with Windows 2003, and perform a new CIC 3.0 Server installation as documented in *CIC Installation and Configuration Guide*.

   > **Note:** In CIC 3.0, the Dialogic HMP software install as part of the CIC server installation.

3. Run Interaction Migrator on the new CIC 3.0 server to import in Migration mode any portions of the configuration that you want to retain. Don't import lines, interfaces, or stations.

As a further example, here are the steps for the same type of upgrade but with one old server and two new servers in a Switchover pair:

1. Perform a new CIC 3.0 installation for a Switchover pair (for example, ServerA and ServerB), as documented in *CIC Automated Switchover System* in the **Technical Reference Documents** section of the CIC 3.0 Documentation Library. Test to ensure that you have a Switchover pair that is functioning normally.
2. Turn off ServerB in the Switchover pair and don't turn it on again until you complete step 4.
3. Run Interaction Migrator to import the appropriate CIC configuration data components in Migration mode from the old system onto ServerA.
4. Test ServerA with the imported data extensively.
5. Start ServerB and let it replicate the data from ServerA.
6. Test ServerB.

# Third server disaster recovery site

Scenarios where a Switchover pair exists at a primary site, with a third backup server at a disaster recovery (DR) site are becoming more common. You can use Interaction Migrator in a *third server disaster recovery site* scenario in an automated fashion to back up the configuration of one of the servers in the Switchover pair to the remote disaster recovery (DR) site.

> **Note:** If the disaster recovery server has a different server name than either of the CIC servers in the Switchover pair, use Interaction Migrator's Migration mode instead of Recovery mode.

Here are the steps for this scenario:

## Implementation/Testing Phase

1. Set up server completely, short of importing configuration.
2. Image Server. Call this Image1.
3. Import newest Migrator Data and test.

If anything doesn't test correctly and requires a configuration change that should have been in Image1:
1. Restore CoreImage.
2. Change configuration.
3. Make new CoreImage.
4. Import Migrator Data again and retest.
5. Complete cycle until CoreImage works fine.

> **Note:** CoreImage contains no configuration. It is **ready** for you to apply configuration.

## Maintenance Phase

1. Record all changes to production servers that need changed on the DR server.
2. On a scheduled interval:
   a. Take list of items proven in production not to cause issues as a task list.
   b. Back up CoreImage to CoreImage_*<date>*.
      If something goes wrong, you have a great audit trail of past task lists you applied (keep those lists for long-term tracking) and you can go back to an older CoreImage:
   c. Restore CoreImage.
   d. Apply task list.
   e. Make new image to replace CoreImage (remember, you backed it up before this step).
   f. Import newest Migrator Data.

If something does not test correctly and requires a configuration change that should have been in Image1:
1. Restore new CoreImage made in step (e).
2. Change the configuration.
3. Make a new CoreImage to replace the one made in step (e).
4. Import Migrator Data again and retest.
5. Complete cycle until CoreImage works fine.

## Disaster Recovery (DR) plan

1. Examine the list of production changes since updating the last image to create a task list. You can implement all or any of these changes. Examine each as a "potential issues" list.
2. Restore CoreImage.
3. Apply anything from the task list that you need.
4. Import newest Migrator Data and test.

# Upgrade with OS change (CIC 2.3.x to CIC 3.0 only)

In this *upgrade with OS change* scenario, a CIC 2.3.1 server with Dialogic HMP system is upgrading to CIC 3.0, and you are also moving from a Windows 2000 to Windows 2003 OS. In this case, you can rebuild the machine rather than use the standard CIC server upgrade installation, or replace the existing hardware with a newer, faster server. In a hardware change scenario, the steps are:

1. Run Interaction Migrator on the old CIC 2.3.1 server to export the existing configuration.
2. Bring your new server online with Windows 2003, and perform a new CIC 3.0 server installation as documented in *CIC Installation and Configuration Guide*.
3. Run Interaction Migrator on the new CIC 3.0 server to import in Migration mode any portions of the old CIC 2.3.1 configuration you want to retain.

# Change log

The following table lists the changes to this document since its initial availability in the CIC 3.0 Documentation Library.

| Date | Changes |
|---|---|
| 16-April-2008 | Copyright and branding updates. |
| 17-April-2008 | In "About Interaction Migrator", added section called "How Interaction Migrator handles CIC configuration data in an import". |
| 17-April-2008 | In "Migrations", made minor updates to "CIC data migration guidelines", "Telephony configuration", and "Interaction Attendant". |
| 17-April-2008 | Added Appendix A: "When to use Interaction Migrator – Sample scenarios". |
| 08-October-2008 | In the "Interaction Migrator Console" section, made correction in first paragraph to the CIC server directory location of Interaction Migrator Console. |
| 31-August-2009 | <ul><li>In the "In Migration mode only" section, expanded the Server Parameters item to explain the steps that the admin must take following the server parameters import.</li><li>Updated copyright information.</li></ul> |
| 20-January-2010 | <ul><li>In the "Interaction Migrator updates" section in "Introduction", updated info for CIC 3.0 that starting with CIC 3.0 SU7, the Interaction Migrator install is updated with each CIC 3.0 SU, and that when you apply the latest CIC 3.0 SU, that you must uninstall the current version and install the latest version.</li><li>In the "Install Interaction Migrator" section, updated the screen capture of the Interaction Migrator download page on the PureConnect Customer Care site.</li><li>Replaced the "Third server disaster recovery site" site section in "Appendix A: When to use Interaction Migrator – Sample scenarios with an updated scenario". Also noted that if the disaster recovery server has a different server name than either of the CIC servers in the Switchover pair, to use Migration mode instead of recovery mode.</li><li>Updated copyright information and PureConnect Customer Care site URLs.</li></ul> |
| 05-March-2010 | In the "Import CIC data" section in "Run Interaction Migrator to export/import CIC data", added a note that in order to import AdminConfig components, you must also import either Users or Workstations components. |
| 08-April-2010 | Added a "Special notices" section to explain a couple of requirements for running an Interaction Migrator import in:<ul><li>The "Import CIC data" section in "Run Interaction Migrator to export/import CIC data".</li><li>The "Interaction Migrator Console" section.</li></ul> |
| 23-August-2011 | In the "Interaction Migrator Console" section, under "Command line options", updated exportNodes option description. |
| 23-August-2011 | In the "Migrations" section, added a section "Queue/IVR interval values". |
| 23-August-2011 | In the "About Interaction Migrator" section, added a section "Structured Parameters". |
| 15-November-2012 | Revised the document for CIC 4.0 and Interaction Migrator 4.0 to accommodate the CIC 2.4/IC 3.0 to CIC 4.0 Migration Package release. |
| 10-April-2014 | Updated the "CIC Service" section in "About Interaction Migrator" and "Run Interaction Migrator to export/import CIC data" to address switchover pairs. |
| 03-October-2014 | Updated documentation to reflect changes required in the transition from version 4.0 SU# to CIC 2015 R1, such as updates to product version numbers, system requirements, installation procedures, references to PureConnect Product Information site URLs, and copyright and trademark information. |
| 19-February-2015 | Updated "Requirements" section for CIC 3.0 to include Microsoft .Net Framework 4.0. |
| 31-March-2015 | Updated Copyright and Trademark information |
| 02-October-2015 | Updated title page for rebranding. Updated copyright and trademark information. |

| | |
|---|---|
| 16-October-2015 | Updated requirements for 2015 R1 or later to Microsoft .NET Framework 4.5.2 |
| 11-January-2016 | <ul><li>Updated "Export CIC data" procedure to indicate that when you export users, you must also export workgroups so that the workgroup memberships are exported.</li><li>Updated Copyright and Trademark information.</li></ul> |
| 17-February-2016 | Updated "Command-line options" section to include devMode option. |
| 27-April-2016 | Updated `-noprompt` options in the Command-line section. |
| 04-October-2016 | Updated "Install Interaction Migrator" and "Run Interaction Migrator to Export/Import CIC Configuration Data" sections to explain the appropriate version of Interaction Migrator to download and install instead of always installing the "latest" version. |
| 11-July-2017 | Updated Microsoft .NET Framework 4.5.2 requirement to Microsoft .NET Framework 4.5.2 or later. Updated copyright and trademark information. |
| 21-September-2017 | Rebranded to Genesys. |
| 09-January-2018 | In the CIC Migration mode only section, added information indicating that when importing IP tables, Interaction Migrator appends `_migrated` to the original IP table names before updating them. |
| 20-March-2018 | Update document format. |
| 04-June-2018 | Added Microsoft .NET Framework 4.7 or later software requirement for PureConnect 2018 R4 or later. |