

**PureConnect**®

## 2018 R5

Generated:

01-February-2019

Content last updated:

1-February-2019

See Change Log for summary of changes.

# **GENESYS**

## **CIC Migration**

## **Installation and Configuration**

#### Abstract

This document provides the planning considerations and procedures for CIC 2.4/3.0 to 2015 R1 or later migrations, and if applicable, Interaction Dialer 2.4/3.0 to 2015 R1 or later migrations.

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

For copyright and trademark information, see https://help.genesys.com/cic/desktop/copyright\_and\_trademark\_information.htm.

## **Table of Contents**

	-
l able of Contents	2
Getting Started	8
Introduction	8
New CIC distribution model	8
	8
CIU patches	8
Why migration instead of ungrade?	0
Wity migration instead of upyrade?	0
CIC 2 4/3 0 server and workstations minimum migration requirements	0 Q
CIC 2015 R1 or later server minimum migration requirements	9
Migration nackage overview	9
	9
Migrations from pre-CIC 2.4 versions	10
Migration Planning	10
Notify PureConnect Customer Care about the migration	10
Upgrade vour CIC and Interaction Media Server product licenses	10
Review the CIC 4.0 License Upgrade Guide	10
Obtain the CIC 4.0 license	10
Request a product upgrade	10
Order and generate a 4.0 production license	11
Interaction Media Server upgrades	11
Upgrade Interaction Media Server from 3.0 to 4.0	11
Opgrade interaction media Server software only CIC configuration data migration	11
CIC database migration	12
CIC database migration scenarios	12
Interaction Optimizer	12
Telephony	12
Switchover	12
Handlers	13
Managed IP phones	13
Non-managed IP phones	13
Interaction Media Server	13
Interaction Media Server 2.4	13
Workstations	13
Language Packs	14
Custom applications	14
Custom reports	14
Interaction Dialer	14
Interaction Dialer license upgrades	14
Interaction Dialer 11/9/11/01 requirements	14
Interaction Dialer 2015 R1 or later servers and workstations	14
Interaction Dialer migration scenarios	15
Interaction Dialer configuration and database migration summary	15
Interaction Dialer migration considerations and caveats	15
Interaction Dialer migration documentation	15
Interaction Conference	15
Interaction Director	16
Guidelines for creating your migration environment	16
Export CIC 2.4/3.0 Configuration Data	17
Interaction Migrator Installation	17
About Interaction Migrator	17
Interaction Migrator-related documentation	17
Interaction Migrator version information	17
Interaction Migrator directory	17
Interaction Migrator Tracing	18
Registry backup	18
Structured parameters	18
Encryption Fulfil Miscrooft NET Fromowork requirements	18
rum microsoft .NET Framework requirements	18
กาเลาสุดเมือง ที่เป็นสายการการการการการการการการการการการการการก	18

Export CIC 2.4/3.0 Configuration Data	19
CIC configuration data migration export	19
Interaction Dialer configuration data migration	19
Multiple CIC/ODS servers (CIC 4.0)	19
Run the Interaction Recorder Migration Prep Utility	19
Who should run the Interaction Recorder Migration Prep Utility?	19
Run the Interaction Recorder Migration Prep Utility	19
Handler pre-migration procedures	20
Complete Interaction Dialer pre-migration procedures	21
Copy the UDL folder from the CIC server to the CIC/UDS 2.4/3.0 server	21
Copy the Dialer configuration file from the CIC server to the CIC/ODS 2.4/3.0 server	21
Export CIC 2.4/3.0 configuration data using interaction Migrator	21
Prepare the CiC Server Environment	32
CIC 2015 RT of later server hardware requirements for CIC	32
CIC 2015 D1 through 2019 D2 conver confluence requirements for CIC	32
CIC 2015 RT Infougn 2018 R3 server software requirements for CIC	32
22 bit versions of SOL Server and Oracle supported but not recommanded	33
S2-bit versions of SQL Server and Oracle supported but not recommended	33
CIC 2015 R1 or later server installation	33
Make recommended selections in CIC Setup Assistant for migrations	34
Change site ID on CIC 2.4/3.0 servers	35
Change site ID on the CIC 2015 R1 or later server	36
Install Interaction Migrator	36
Prepare the Interaction Dialer 2015 R1 or Later Server Environment	39
CIC 2015 R1 or later server hardware requirements for Dialer	39
CIC 2015 R1 or later server software requirements for Dialer	39
Database server requirements	39
Additional database server requirements for Interaction Dialer	39
Microsoft SQL Server 2008 R2 Command Line Utilities (x64)	39
Oracle Database Utilities	39
Install the CIC 2015 R1 or later server	40
Create a UDL file for the new 2015 R1 or later database	40
ODS 2015 R1 or later server software requirements	40
Install the ODS 2015 R1 or later server	40
Multiple CIC/ODS servers (CIC 2015 RT or later)	40
Multiple CIC/ODS servers (CIC 2015 RT of later)	41
Multiple CIC/ODS servers (CIC 2015 RT or later)	41
CIC Database Migration Assistant Installation	41
About CIC Database Migration Assistant	41
About the Cic Database Migration Assistant package	41
Tracing (CIC Database Migration Assistant)	41 41
CIC Database Migration Assistant client computer	41 41
Fulfil Microsoft NFT Framework requirements for client computer	42
Oracle client requirements	42
Install CIC Database Migration Assistant	42
Prepare for CIC Database Migration	45
Prepare the CIC Database Migration Assistant client computer	45
Install Microsoft SQL Server 2008 Management Studio	45
Install Oracle Administrator Client	45
Upgrade the 2.4 or 3.0 database schema	45
Changes to database schema in CIC 4.0 SU 3 and later	45
Upgrade the CIC 2.4 or 3.0 database schema to the most recent CIC 3.0 database schema (SQL Server)	45
Manually run the database schema upgrade scripts (SQL Server)	45
Upgrade the CIC 2.4/3.0 database schema to the most recent CIC 3.0 database schema (SQL Server)	46
Complete auplicate/null clean up procedules on the CIC 2.4/CIC 3.0 database (SQL Server) Ungrade the CIC 4.0 database schema to the most recent CIC 2015 R1 or later database schema (SQL Server)	47 48
Upgrade the CIC 2.4/3.0 and CIC 2015 R1 or later database schema (Oracle)	48
Run the database schema upgrade scripts (Oracle) manually	48
Upgrade the CIC 2.4/3.0 database schema to the most recent CIC 3.0 database schema (Oracle)	49
Complete duplicate/null clean up procedures on the CIC 2.4/CIC 3.0 database (Oracle)	50
Upgrade the CIC 2015 KT or later database schema to the most recent CIC 2015 RT or later database schema (Oracle)	51
Frepare the CIC 3 0 and CIC 2015 RT OF Ider (databases) (COL Server)	21
r repare the of 0.0 and of 2010 KT of later usiabases (QC of Vel)	52

SQL Server pre-migration procedures for CIC	52
Modify the recovery mode for SQL Server	52
Run the SQL Server migration check script	52
SQL Server 2000	52
SQL Server 2000) Run script to create the sp. tables info. rowset 64 stored procedure	53
Change the remote query timeout	53
Create a SQL Server migration user	53
Prepare the CIC 3.0 and CIC 2015 R1 or later databases (Oracle)	53
Oracle pre-migration procedures for CIC	53
Create data and index tablespaces	54
Set the authentication parameter for CIC	54
Run Oracle migration check script	54
Create an Oracle migration user	54
Example command	54
Change commit frequency	56
Commit Frequency Command	56
Interaction Optimizer considerations	56
Complete Interaction Tracker table group pre-migration procedures	56
Sync Tracker Configuration data on the source IC server	57
Migrate Tracker Configuration table group on the source CIC server	58
Prepare the CIC 3.0 and CIC 2015 R1 or later servers (SQL Server and Oracle)	58
Apply Interaction Recorder ESs	58
Stop purge processes on CIC 3.0 and CIC 2015 R1 or later servers	58
Stop Reporting data purging	59
Stop Interaction Recorder data purging	59
Stop Interaction Tracker data purging on the CIC 3.0 and CIC 2015 R1 or later servers	62
Rescue orphaned recordings in Interaction Recorder (SQL Server and Oracle)	62
CIC 3.0 Database Migration	63
How CIC Database Migration Assistant migrates the database	63
Migration scenarios	63
One-to-one migration	63
Many-to-one migration	63
	62
	64
Tracker Configuration table group considerations	64
	04
	04
	64
CIC 3.0 configuration and default value:	65
About the Migration scripts	65
Migrate the CIC 3.0 database	66
Troubleshooting the CIC Database Migration Assistant	78
Clean up scripts	79
Troubleshooting database table groups and table migration	79
Complete CIC 2015 R1 or later database post-migration procedures	79
Run post-migration check script for CIC	79
Restart purge processes on CIC 2015 R1 or later server	79
Restart Reporting data purging	80
Restart Interaction Recorder data purging	80
Restart Interaction Tracker data purging	82
Reapply Interaction Recorder Security Policies	82
Prepare for Interaction Dialer Database Migration	84
Prepare the CIC Database Migration Assistant client computer for the Dialer database migration	84
Convite LIDE folder and Dialer configuration file to the CIC Database Migration Assistant client computer	84
Configure Oracle TNS names/Net Service names on the CIC Database Migration Assistant client computer	85
Ungrade the Interaction Dialer 2015 B1 or later database schema	85
Prenare the Interaction Dialer 2 1/3 0 and Interaction Dialer 2015 D1 or later databases	05
SOL Server pre-migration procedures for Dialer	00 05
Modify the recovery mode for SOL Server	03 05
would the recovery mode for our oerver	85
Greate a SQL Server User	00 00
Oracle pre-migration procedures for interaction Dialer	86
Set the authentication parameter for Dialer	86
Create an Uracle user	86
Contigure Uracle TNS names/Net Service names on the CIC server	86
Cross-platform data migration	86
Apply Interaction Dialer ESS	86
CIC server	86

CIC/ODS 2015 R1 or later server	86
Migrate the Interaction Dialer 2.4/3.0 Database	87
Dialer database migration considerations	87
Migrate the Dialer 2.4/3.0 database	87
Troubleshooting the CIC Database Migration Assistant for Dialer	99
Complete Dialer database post-migration procedures	99
Run post-migration check script for Dialer	100
Move Dialer contact lists and undate Dialer campaigns to point to new location (recommended)	100
Migrate the Configuration	101
Impact CIC 2 4/20 Configuration Data	101
Before your up betweeting Million Data	101
Berole you fur interaction Migrator to Import Cic 2.4/3.0. Cominguration data	101
Run meraction migrator to import Cic 2.4/3.0 comiguration data	101
Re-activate ACD email routing	109
Review migrated server parameters	110
	110
	110
Change in derault SIP transport protocol	110
Complete Interaction Dialer post-imigration procedures	111
Review migrated interaction Dater settings and complete post-migration procedures in interaction Administrator	
Reconfigure Rules and Policy Sets	112
Configure Campaigns in a matchine ODS environment.	113
Configure DNC Sources and assign them to campaigns, where applicable	114
Configure maximum calls and maximum call rate	117
Configure maximum lines per campaign	118
Specify default settings for Interaction Dialer Manager containers	119
Configure new Interaction Dialer 4. 2015 R1 or later features in Interaction Dialer Manager	119
Review and modify Wrap-up Categories and Codes	119
Configure the From email field in Policy and Rule actions	121
Reassign access and security rights	122
Assign a configurable priority number to campaigns for multiple campaigns Medify queter pariets for changes in Dialer 2015 D1 or later	125
Modify custom scripts for Changes in Dialei 2015 K1 of later	125
Migrate CIC 2.4/2.0 Llandlara	120
Migrate CIC 2.4/3.0 Handlers	120
Complete nancier pre-migration procedures	120
General methodology	120
Plan for base handler modifications	12/
Plan for and back up nandler customizations	12/
Determine which handlers have changed	128
Back up most recently published handlers	128
Complete nanoier post-migration procedures	128
Open and publish custom-written nandiers	129
Modify and publish Cit 2015 R For later base handlers (including customization points)	130
Migrate CIC 3.0 Managed IP Phones	130
Support for migrating CIC 3.0 managed IP phone types to CIC 2015 R1 or later	130
Recommendations for non-managed IP phones	130
Recommendations for IP phone models supported in CIC 2015 R1 or later	131
Convert existing non-managed IP phones to managed IP phones	131
Create managed IP phones Recommendations for unsupported ID phone models or to continue using non-managed ID phones	131
Recommendations for unsupported in phone models of to continue using non-managed in phones	101
lueitary imported managed in phones	101
Supported Delycom phone models and firmware	122
Options for pointing phones to the CIC 2015 P1 or later conver	132
Dejet the phones to the CIC 2015 R1 of later server	102
	100
Create a DHCP custom option (recommended)	100
Greate a Divo Tusi (A) leculu Configure managed ID phones manually	104
	104
Greate a second DNS Host (Δ) record	134
Migrate Interaction Media Server 3.0	125
Review Interaction Media Server 3.0 to 2015 R1 or later migration ontions	125
New Interaction Media Server 2015 R1 or later appliance	125
Existing Interaction Media Server G6.3.0 appliance ungraded to 2015 R1 or later scenario	135
Existing Interaction Application Server (IAS) G7 or CIC Server G73.0 appliance used as Interaction Media Server upgraded to 2015 D1	0r
later	136
Interaction Media Server 2.4 considerations	136

Before you begin the migration	136
Install Interaction Migrator on Interaction Media Server 3.0	136
Export Interaction Media Server 3.0 configuration data	136
Complete Interaction Media Server pre-migration procedures	144
Copy stored recordings and update the recordings storage path	144
Export SIP Proxy configuration and save it to an external location	144
Install or upgrade to Interaction Media Server 2015 R1 or later	144
New Interaction Media Server 2015 R1 or later appliance installation	144
Existing Interaction Media Server G6 3.0 appliance upgraded to 2015 R1 or later	144
Existing Interaction Application (IAS) G7 or CIC Server G7 3.0 appliance used as Interaction Media Server upgraded to 2015 R1 or later	145
Apply the latest CIC 4.0 Service Update for Interaction Media Server	145
Install Interaction Migrator on Interaction Media Server 2015 R1 or later	145
Import Interaction Media Server 3.0 configuration data	145
Complete post-migration procedures	153
Generate new certificates for your CIC servers	153
Opdate the recordings storage path in interaction Recorder Policy Editor	154
Restore the SIP Proxy configuration file to the SIP Proxy Server install directory	154
Add CIC 2015 P1 or later converte lateraction Media Server	154
Add CiC 2013 RT OF later server to interaction media Server	154
	100
Workstation Migration Planning Options for up and ing CIC 2. O plicat workstation applications	155
About CIC 2.0 to CIC 3.0 client workstation applications	100
About oid 5.0 to die 2015 killon alter dient workstation upgraue installations Migration /ungrada connario is for same OS only	100
Migration/upgrade scenario is for same os only Draviaualy installed workstation applications are uninstalled	155
Previously installed localized workstation applications are uninstalled	155
CIC 2015 P1 or later client workstation bardware requirements	155
CIC 2015 P1 or later client workstation natural enquirements	156
Windows OS requirements	156
Other requirements	156
Changes to IC User Applications in CIC 2015 R1 or later	156
Custom client settings	156
Custom client settings stored on the CIC server	157
Custom client settings stored on the workstation	158
Localized client workstation application upgrades	159
CIC 2.4 to CIC 4.0 client workstation application upgrades	159
Interaction Dialer 2.4/3.0 to CIC 2015 R1 or later client workstation application upgrades	159
Migrate CIC 3.0 Workstations Using Interactive Update	159
About Interactive Update	160
Required CIC and Interactive Update versions	160
CIC 3.0 server	160
CIC 3.0 client workstation	160
CIC 2015 R1 or later server	160
Interactive Update Provider settings	160
Interactive Update Provider 1.0 on CIC 3.0 server	161
Interactive Update Provider 2015 R1 or later on CIC 2015 R1 or later server	161
CIC 3.0 to CIC 2015 R1 or later client workstation migration overview	161
Part 1: Client workstation migration tasks on Interactive Update Provider 1.0	161
Part 2: Client workstation upgrade tasks on Interactive Update Provider 2015 R1 or later	162
Part 1: Client workstation upgrade tasks on Interactive Update Provider 1.0	163
CIC 3.0 client workstation applications in example scenario	163
Add the Interactive Update Client 2015 R1 or later as a new update, allow workstations to receive updates from Provider 2015 R1 or	later
Create a migration computer group 16	6163
Mark Interactive Update Client 2015 R1 or later as GA and push out to the migration computer group	170
Gient-side notification of the interactive opdate Client 2015 KT of later Installation Dart 9: Client workstation upgrade tasks on Interactive Update Provider 2015 D1 or later	1/2
Part 2. Client workstation upgrade tasks on interactive opdate Provider 2015 RT of later	170
Add the latest Interactive Undate Client 2015 D1 or later patch as a new undate	170
Add the CIC 2015 P1 or later client workstation application installs and natches as new undated	174
Add the Client Language Plugins as new undates	176
Mark the installs and SUs as GA and push out to client workstations	177
Client-side notification of the Interactive Update 2015 R1 or later natch and CIC 2015 R1 or later client workstation installation	177
Migrate CIC 3.0 Workstations Using Setup exe	177
About Setup.exe	177
IC User Applications (32-bit and 64-bit)	177
IC User Applications (32-bit and 64-bit) requirements	178

Upgrade Interactive Update Client	178
Upgrade IC User Applications	184
Verify FQDN resolution (IC User Applications)	194
IC Business Manager Applications	194
IC Business Manager Applications requirements	194
Upgrade IC Business Manager Applications	195
Install Interactive Update Client (IC Business Manager Applications)	195
Verify FQDN resolution (IC Business Manager Applications)	195
IC Server Manager Applications	195
IC Server Manager Applications requirements	195
Upgrade i C Server Manager Applications	190
Verify FODN resolution (IC Server Manager Applications)	190
Appendixee	190
Appendix A: Cuidelines for Creating Veur Migration Environment	197
	197
Virtualized development environment recommended	197
Nir dalized development environment recommended Development database	197
Development CIC server	197
Other servers in the development environment	198
Migrating to the production environment	199
Appendix B: Interaction Recorder Post-Migration Results	199
CIC 3.0 to CIC 2015 R1 or later Interaction Recorder conversion results in Interaction Administrator	199
Interaction Recorder base configurations	199
Data purging	199
Selection rules	199
Category	199
Categorization rules	200
Questionnaires	200
Archives	200
Recording attributes	200
Recorder Master Key	200
Stored recordings and the recordings storage path	200
	200
Interaction Screen Recorder capabilities and settings	201
Interaction Recorder Remote Content Service settings	201
Interaction Decorder audit entrice	201
Interaction Recorder client searches	201
Interaction Recorder Extreme Query Server	201
Annendix C: Oracle Tablespaces	201
Appendix D: Interaction Conference Migration	202
Interaction Conference architecture	202
Interaction Conference migration requirements	203
Interaction Conference 3.0 server	203
Interaction Conference 2015 R1 or later server	203
Migrate Interaction Conference	203
Run Interaction Migrator to export Interaction Conference 3.0 configuration data	203
Install Interaction Conference 2015 R1 or later	203
Run CIC Database Migration Assistant to migrate the Interaction Conference database	204
Change the Interaction Conference site ID	204
Run Interaction Migrator to import the Interaction Conference configuration data	204
Appendix E: Interaction Director Migration	204
Interaction Director client/server architecture	205
Interaction Director migration	205
Interaction Director migration requirements	205
Interaction Director 2.4 Servers	205
Migrate Interaction Director monitored servers	205 2∩5
Migrate the Director server	203
Install Interaction Migrator 4.0 on the Interaction Director 2.4 server	203
Install the 4.0 Interaction Director server	206
Run Interaction Migrator to export Interaction Director 2.4 configuration data	206
Run CIC Database Migration Assistant to migrate the Interaction Director database	206
kun interaction Migrator to import the Interaction Director configuration data	206
Change Log	207

## **Getting Started**

## Introduction

This section discusses minimum requirements for migrations and the scope of the current release of 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.

#### **CIC releases**

- CIC 4.0 SU 6 was the last release using the older model. CIC 2015 R1 is first release of the new distribution model.
- CIC 2015 R1 or later releases consist of new features, enhancements, and bug fixes.
- CIC 2015 R1 or later release components are .msi files.
- Each CIC 2015 R1 or later release functions as a new CIC installation and as an update to existing CIC installations.
- CIC 2015 R1 or later can applied to any CIC 4.0 SU.

#### **CIC** patches

- Patches are a feature of the new distribution model.
- A patch is a package of Engineering Specials (bug fixes only) created for a CIC 20## R# release, cumulative of previous patches, distributed every two weeks.
- CIC 2015 R1 Patch1 and later patch components are .msp files.

For more information, see https://my.inin.com/products/cic/Pages/Releases-and-Patches.aspx.

**Note:** For the purposes of this guide, *CIC* generally refers to CIC 2015 R1 or later, acknowledging that it is based on the continuous development of CIC 4.0. This document provides specific release/version numbers as needed.

#### **PureConnect Documentation Library**

You can access the PureConnect Documentation Library at https://help.genesys.com/cic.

#### Why migration instead of upgrade?

CIC server, database and Interaction Media Server changes in CIC 2015 R1 or later require a migration instead of an *in-place* upgrade.

- CIC server: The CIC 2015 R1 or 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.
- **CIC database**: Changes to the database schema in CIC make it necessary to migrate some or all the data from the existing database to a new CIC database, instead of upgrading the existing database.
- Interaction Media Server: The Interaction Media Server operating system requirements make it preferable to migrate Interaction Media Server 3.0 configuration data to 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).

If the workstation OS supports the CIC 2015 R1 or later client workstation applications, you can upgrade CIC client workstations to CIC 2015 R1 or later *in-place*, on the same computers.

#### Minimum requirements for migrations

This section describes the minimum requirements for CIC 2.4/3.0 to CIC 2015 R1 or later migrations.

#### CIC 2.4/3.0 server and workstations minimum migration requirements

- CIC 2.4 SU 47 or later (recommended), CIC 2.4 SU 33 (hard minimum)
   OR -
  - CIC 3.0 SU 14 or later (recommended), CIC 3.0 SU 11 (hard minimum)
- Interactive Update 1.0 SU 11 or later (on CIC 3.0 server and workstations)

#### CIC 2015 R1 or later server minimum migration requirements

- CIC 2015 R1 or later
- Interactive Update 2015 R1 or later

#### Note:

- Sites using Interaction Recorder and Interaction Tracker may need ESs and other procedures to meet the minimum requirements for migration, depending on the CIC 2.4/3.0 and 2015 R1 or later versions. For details, see Export CIC 2.4/3.0 Configuration Data and Prepare for CIC Database Migration.
- For sites using Interaction Dialer, see Interaction Dialer.
- For sites using Interaction Conference, see <u>Appendix D: Interaction Conference Migration</u>.
- For sites using Interaction Director, see <u>Appendix E: Interaction Director Migration</u>.

#### Migration package overview

The current CIC 2.4/3.0 to CIC 2015 R1 or later migration package contains tools and documentation that support:

- Moving all users, phones, and functions from one CIC server (pair) to a new CIC server (pair) in one phase
- Database (Reporting, Interaction Recorder, Interaction Tracker) migrated by site ID, date range, and table groups (CIC 4.0 SU 3 and later)
- Existing CIC system uses VoIP (Dialogic HMP)
- Handler migration
- Managed IP phones migration (Polycom)
- Interaction Media Server migration
- Workstation application migration using Interactive Update or  ${\tt Setup.exe}$
- Language Pack migration (server and workstation)
- Interaction Recorder migration
- Interaction Dialer migration
- Interaction Conference migration
- Interaction Director migration

#### **Migration package**

Starting with CIC 2015 R2, the latest supported migration package distributes as a Migration .iso, available on the **Downloads** page at <a href="https://my.inin.com/products/Pages/Downloads.aspx">https://my.inin.com/products/Pages/Downloads.aspx</a>. Previously, the migration package tools were available as separately released and posted downloads. The latest supported migration package supports the latest CIC release and patch. Always check the **Downloads** page for the latest supported migration package.

The migration package consists of the following tools:

- CIC Database Migration Assistant package
- Interaction Migrator
- IR Migration Prep Utility

Also:

- For the latest information about the migration package, see <a href="https://my.inin.com/products/cic/Pages/Migrations.aspx">https://my.inin.com/products/cic/Pages/Migrations.aspx</a>.
- For detailed instructions on running each of the migration tools, see the CIC Migration Guide (this document).

#### Migrations from pre-CIC 2.4 versions

Because versions of CIC before CIC 2.4 are End of Life (EOL), Genesys does not support or test migrations from pre-CIC 2.4 versions to CIC 2015 R1 or later. For information about product version End of Life, see <a href="https://my.inin.com/products/pages/product-version-end-of-life.aspx">https://my.inin.com/products/pages/product-version-end-of-life.aspx</a>.

However, you can submit any known issues and workarounds related to migrating from pre-CIC 2.4 versions to PureConnect Customer Care. For more information about issues and workarounds, see Knowledgebase (KB) article: <a href="https://my.inin.com/Support/Pages/KB-Details.aspx?EntryID=Q133829957800212">https://my.inin.com/Support/Pages/KB-Details.aspx?EntryID=Q133829957800212</a>. The information within the KB article is not inclusive of all issues that you could encounter, and in no way implies support of any specific migration scenario.

## **Migration Planning**

This section describes various migration planning considerations.

#### Notify PureConnect Customer Care about the migration

Contact PureConnect Customer Care to notify them about the migration and provide them with the following information: customer site name, customer site location, and customer site contact; hardware platform; a summary of your migration plans; and all available backup files.

If you need assistance with your migration plans or implementation, contact PureConnect Customer Care.

#### Upgrade your CIC and Interaction Media Server product licenses

This section describes the procedures for upgrading CIC and Interaction Media Server product licenses.

#### **Review the CIC 4.0 License Upgrade Guide**

Before you migrate to CIC 2015 R1 or later from an earlier release, convert your existing license to a 4.0 license.

Note: Genesys hasn't changed CIC licensing with the new distribution model. You still need a CIC 4.0 license.

The CIC 4.0 License Upgrade Guide outlines licensing changes for CIC 4.0 in comparison to older releases, with an emphasis on CIC 3.0. This guide also includes CIC 4.0 license requirements, new and discontinued licenses, upgrading licenses, and options available during the conversion of licenses to the new release. For more information, see the *CIC 4.0 License Upgrade Guide* at <a href="https://my.inin.com/products/cic/Pages/Marketing-Collateral.aspx">https://my.inin.com/products/cic/Pages/Marketing-Collateral.aspx</a>.

#### **Obtain the CIC 4.0 license**

Request a product upgrade and then generate the CIC 4.0 license.

#### Important!

You need a CIC 4.0 license file. The CIC system won't function correctly unless you load a CIC 4.0 license.

#### Request a product upgrade

Since version 4.0 has a different license in several areas of the product, request a product upgrade first so that Genesys can translate all old orders to the 4.0 license.

To request a product upgrade:

- Access the License Management Web site at http://license.inin.com/.
- Click ININ CIC other products and log on using your Genesys logon credentials. The Account Summary page appears, with a
  summary of all ordered items available to license for your account.
- Click Click here to upgrade your product and follow the posted instructions.
- Complete the upgrade request form on this page and submit it.

After you submit the **Product Upgrade Request** form, you receive a **4.0 License Translation form**. Review, sign, and submit this form to confirm that you and Genesys are in agreement on the contents of your license.

#### Order and generate a 4.0 production license

After the **4.0 License Translation** form processes, order and generate a 4.0 production license, and download it to the CIC server.

#### To order and generate a 4.0 production license:

- 1. Place the order for the CIC 4.0 product with Genesys.
- After Genesys creates the account and processes the order, you can generate the license from the License Management Web site at <a href="http://license.inin.com/">http://license.inin.com/</a> using your Genesys logon credentials. Click Manage Licenses and follow the instructions for generating a new license.
- 3. When asked, provide the following computer information:
  - Host ID (Host ID is based on the MAC address of the network card on the CIC Server)
  - Machine Name
  - System Type (telephony platform)
  - Mail Connector (mail system)
- 4. After specifying your license selections, generate and view the license. The license file is *hostid*.i3lic.
- 5. Download the license file to the CIC server or location accessible from the CIC server.

#### Interaction Media Server upgrades

Interaction Media Server upgrades currently vary depending on your requests. You may have to contact License Management for requests to upgrade Interaction Media Server from 3.0 to 4.0 or to upgrade Interaction Media Server software only.

In the future, you can process an Interaction Media Server upgrade request exclusively from the License Management web site.

#### Upgrade Interaction Media Server from 3.0 to 4.0

Currently, when you request to upgrade Interaction Media Server from 3.0 to 4.0 from the License Management website, certain required Interaction Media Server information doesn't appear. To complete the upgrade request, contact License Management at <u>licenseissues@inin.com</u> with the following information:

- The Interaction Media Server's Host ID
- The Interaction Media Server's serial number

License Management returns an email confirmation, processes your request, and, on approval, provides instructions on how to generate and download the Interaction Media Server 4.0 license.

#### **Upgrade Interaction Media Server software only**

The option to upgrade Interaction Media Server software only is not available on the License Management website at this time. To upgrade Interaction Media Server software only, email License Management at <u>licenseissues@inin.com</u> with the software option you want to upgrade to 4.0.

License Management returns an email confirmation, processes your request, and, on approval, provides instructions on how to generate and download the requested software license(s).

#### **CIC configuration data migration**

The current release of the CIC 2.4/3.0 to CIC 2015 R1 and later migration package supports migrating all users and CIC configuration data at the same time using Interaction Migrator. For more information, see Export CIC 2.4/3.0 Configuration Data and Import CIC 2.4/3.0 Configuration Data.

A future release of the migration package will contain an additional tool that supports migrating users and CIC configuration data at different times (phased migration).

#### **CIC database migration**

The current release of the migration package supports migrating the CIC database (Reporting, Interaction Tracker, Interaction Recorder) by site ID, date range, and table groups using CIC Database Migration Assistant. For more information, see <u>Install CIC</u> <u>Database Migration Assistant</u>, <u>Prepare for CIC Database Migration</u> and <u>Migrate the CIC 3.0 Database</u>.

Note: For information about Interaction Dialer database scenarios, see Interaction Dialer.

#### **CIC database migration scenarios**

There are two scenarios for migrating from a CIC 3.0 database to a CIC 2015 R1 or later database. The method you use depends on your situation.

- One-to-one migration: The current release of the CIC 2.4/3.0 to CIC 2015 R1 or later migration package supports only one-to-one migrations. This scenario is the recommended method for migrating from a CIC 3.0 to a CIC 2015 R1 or later database. A one-to-one migration scenario migrates a single CIC 3.0 database to a single CIC 2015 R1 or later database. You could have multiple CIC 3.0 and CIC 2015 R1 or later databases; however, you are migrating on a one-to-one basis. So, for each CIC 3.0 database, you have a corresponding CIC 2015 R1 or later database you are migrating to.
- Many-to-one migration: A many-to-one migration scenario migrates two or more CIC 3.0 databases to a single CIC 2015 R1 or later database. Run it again to migrate each subsequent CIC 3.0 database to the same CIC 2015 R1 or later database. If you are migrating multiple databases that contain data with identical site IDs, extra manual steps are necessary to prepare this data for migration. Contact PureConnect Customer Care for assistance with this scenario.

#### **Interaction Optimizer**

The current release of the migration package supports an *all in one* bulk migration of Interaction Optimizer data. Mixing the data between CIC 3.0 and CIC 2015 R1 or later is not supported. When you run the CIC Database Migration Assistant as described in *Migrate the CIC 3.0 database*, and select the *Optimizer Group*:

• ALL 3.0 Interaction Optimizer records (not restricted by date range or Site ID) import to the target database as long as there are no 2015 R1 or later Interaction Optimizer records in the target database.

**Note:** You can delete the 4.0 Optimizer records by running the Delete\_Optimizer\_Tables\_PreMigration.sql script located in the \Scripts folder in the CIC Database Migration Assistant installed folder **before** migrating the CIC database.

• Ensure that all Optimizer agents go live on the new 4.0/2015 R1 or later environment after you migrate Optimizer data contained in the database. This confirmation ensures that no mixing of data between CIC 3.0 and CIC 2015 R1 or later occurs.

#### Telephony

CIC is now a pure application server, a shift that eliminates the need for third-party voice hardware or HMP software. In place of voice hardware and HMP, Genesys upgraded Interaction Media Server to handle all CIC audio needs.

The current release of the migration package supports migrating existing CIC 2.4/3.0 systems with VoIP (Dialogic HMP) only.

A future release of the migration package will support migrating existing CIC 2.4/3.0 systems with TDM (Dialogic Board-based, Aculab, and AudioCodes). This migration will involve a plan for moving from TDM to SIP.

#### Switchover

The current release of the migration package assumes that customers are using new computers for their CIC 2015 R1 and later servers and setting up a new CIC 2015 R1 and later Switchover pair.

For more information about using Interaction Migrator in Switchover environments, see the Interaction Migrator Technical Reference.

A future release of the migration package will support breaking the Switchover pair and upgrading in place.

#### Handlers

CIC base handlers change substantially in each release. Before importing CIC 2.4/3.0 configuration data with Interaction Migrator, inventory each modified base handler. After importing the CIC configuration data, modify and publish the base handlers on the CIC 2015 R1 and later server. Interaction Migrator does not publish or manage custom handlers. Interaction Migrator places the handlers from the export into the designated extraction folder. Publish and manage custom handlers manually post-migration.

For more information, see Migrate CIC 2.4/3.0 Handlers.

#### Managed IP phones

The migration package supports migrating CIC 3.0 managed IP phones from a CIC 3.0 system to a CIC 2015 R1 or later system.

Of the three managed IP phone types:

- Genesys tested and documented the migration of CIC 3.0 managed Polycom phones to CIC 2015 R1 or later for the current release of the migration package. For more information, see <u>Migrate CIC 3.0 Managed IP Phones</u>.
- Genesys plans to test and document migration of CIC 3.0 Interaction SIP Station and SIP Soft Phones to CIC 2015 R1 or later in a future migration package release.

#### Non-managed IP phones

For CIC 2.4 sites or CIC 3.0 sites with non-managed IP phones, Genesys recommends converting to or creating new managed IP phones. For more information, see <u>Recommendations for non-managed IP phones</u>.

#### **Interaction Media Server**

The current 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 3.0 appliance 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 existing 3.0 Interaction Media Server appliances, the migration requires other utilities to upgrade the appliance to Interaction Media Server 4.0. For more information, see <u>Migrate Interaction Media Server</u>.

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.

#### **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 4.0. 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 currently is to wipe the server clean and follow the procedures outlined in the <u>Interaction Media</u> <u>Server Technical Reference</u> in the <u>PureConnect Documentation Library</u> to install a new *software only* media server, including manually reconfiguring the server.

#### Workstations

If the workstation OS supports the CIC 2015 R1 client workstation applications, the migration package supports migrating/upgrading client workstation applications on existing CIC 3.0 workstations to CIC 2015 R1 or later on the same computer. For workstation migration planning considerations, see <u>Workstation Migration Planning</u>.

#### Language Packs

For sites with one or more CIC Language Packs installed on the CIC 2.4/3.0 system, the migration package supports:

- Migrating localized custom Interaction Attendant wave files, handlers, and prompts as part of the CIC configuration data migration using Interaction Migrator. For more information, see <u>Export CIC 2.4/3.0 Configuration Data</u> and <u>Import CIC 2.4/3.0 Configuration Data</u>.
- Upgrading localized client workstation applications. For more information, see Migrate Client Workstations.

As part of your migration planning, see the languages supported in CIC and the scope of localization for each language at <a href="https://my.inin.com/products/cic/Pages/Localization.aspx">https://my.inin.com/products/cic/Pages/Localization.aspx</a>.

#### **Custom applications**

Genesys deprecated the Interaction Client Win32 COM API (ClientCOM API) in CIC 4.0 and doesn't support it in any future releases. In CIC 4.0, client application functionality and features implement through the CIC Extension Library (IceLib) API. You must recompile and test any extensions or customizations developed for the CIC 2.4/3.0 system against the 2015 R1 or later IceLib API. If these extensions leverage ClientCOM, Genesys strongly recommends refactoring the extensions using IceLib to maintain forward compatibility. For more information, see <u>System APIs Help</u> in <u>PureConnect Documentation Library</u>.

#### **Custom reports**

Database views drive predefined CIC reports. Many tables in the database schema have undergone significant changes. Despite these changes, the reporting views that exist in CIC 3.0 SU 14 carry forward to CIC 2015 R1 or later. The definitions of these views are modified to present the reporting data in a compatible format. If you developed custom reports using these standard views, test these reports after migrating the database. If custom reports reference tables in CIC 3.0 directly, or customizations that include stored procedures reference tables in CIC 3.0 directly, you must redevelop the reports.

We strongly recommend redeveloping your custom reports for the CIC 2015 R1 or later report structure when practical.

#### **Interaction Dialer**

Existing Interaction Dialer 2.4/3.0 systems must migrate to Interaction Dialer 4.0 as part of the CIC 2.4/3.0 to 2015 R1 or later migration process.

#### Interaction Dialer license upgrades

Review CIC 4.0 Licensing Upgrade Guide at <u>https://my.inin.com/products/cic/Pages/Marketing-Collateral.aspx</u> for information on Interaction Dialer 4.0 licenses needed for Interaction Dialer 3.0 to 2015 R1 or later migrations.

Obtain the Interaction Dialer 4.0 licenses needed for your site.

#### Interaction Dialer migration requirements

The minimum requirements for Interaction Dialer 2.4/3.0 to 4.0 migrations are:

- Interaction Dialer 2.4/3.0 servers and workstations
- Interaction Dialer 2015 R1 or later servers and workstations

#### Interaction Dialer 2.4/3.0 servers and workstations

Interaction Dialer 2.4 SU 19 or later

-OR-

Interaction Dialer 3.0 SU 10 or later

#### Interaction Dialer 2015 R1 or later servers and workstations

- CIC 2015 R1 or later
- Interaction Dialer 2015 R1 or later

#### Interaction Dialer migration scenarios

The current release of the CIC 2.4/3.0 to CIC 2015 R1 or later migration package supports only one-to-one CIC/ODS server migrations. Multiple CIC/ODS server environments must create a 2015 R1 or later ODS server for each existing 2.4/3.0 CIC/ODS server and migrate the configuration data on a one-to-one basis.

The current release of the CIC 2.4/3.0 to CIC 2015 R1 or later migration package does *not* support the following Interaction Dialer 2.4/3.0 to 2015 R1 or later migration scenarios:

- Multiple source CIC/ODS servers into a single target CIC/ODS server
- Single source CIC/ODS servers into a multiple target CIC/ODS server

#### Interaction Dialer configuration and database migration summary

- Interaction Migrator exports and imports Interaction Dialer configuration data along with the CIC configuration. Run Interaction Migrator to migrate the CIC and Dialer configuration on each CIC/ODS server in your implementation.
  - Interaction Migrator sets the Launch Dialer Migration Package Processor server parameter to 1 upon import. Dialer server sets the parameter to 0 upon a successful import or if it is unable to find a dialer\_migration.zip file.
  - The migration creates an event log entry to indicate when the package processor started and when the package processor completed. The completed entry indicates that the migration was successful, successful with errors, or failed. If migration includes error or fails, the log entry refers to the trace logs for more details.
- CIC Database Migration Assistant has two modes: one for migrating the CIC database and one for migrating the Interaction Dialer database. First, run CIC Database Migration Assistant to migrate the CIC database. Second, run CIC Database Migration Assistant for Dialer to migrate the Interaction Dialer database.

#### Interaction Dialer migration considerations and caveats

This section describes the Interaction Dialer 2.4/3.0 components that migrate to 2015 R1 or later, the unsupported components in and/or migrated to 2015 R1 or later, and other caveats.

- Interaction Dialer custom configurations, campaigns that reside in active Workflows, Policy Set and Rule Set objects, Email Rules, and Dialer's [Default Connection] migrate.
- Campaigns not contained within an active workflow don't migrate.
- Default configurations (except Dialer's [Default Connection]) don't migrate.
- Reason and Finish Codes translate during the migration into Wrap-up Codes and Wrap-up Categories.
- Paging support is obsolete and, therefore, Pager Rule actions and Policy behaviors don't migrate.
- Workflow rules and actions map to the corresponding campaign rule actions after migration.

#### Interaction Dialer migration documentation

The Interaction Dialer migration is highly integrated in the CIC migration process. As appropriate, this document contains:

- References to Interaction Dialer in sections that describe a specific CIC 2.4/3.0 to 2015 R1 or later migration procedure in which the migration includes Interaction Dialer components automatically.
- Interaction Dialer-related sections that describe a specific CIC 2.4/3.0 to 2015 R1 or later migration procedure, containing extra tasks to complete for the Interaction Dialer migration.
- Interaction Dialer-specific sections that describe an Interaction Dialer 2.4/3.0 to 2015 R1 or later only migration procedure.

#### **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.

For more information, See Appendix D: Interaction Conference Migration.

#### **Interaction Director**

Note: Interaction Director 2015 R1 or later is not available currently.

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

For more information, see <u>Appendix E: Interaction Director Migration</u>.

#### Guidelines for creating your migration environment

After you review the migration tasks summarized in the <u>Migration Checklists</u> and described in detail throughout the guide, see <u>Appendix A: Guidelines for Creating Your Migration Environment</u>. It contains guidelines for creating a migration environment for your own implementation. The guidelines are based on pre-release testing of the CIC 2.4/3.0 to 4.0 migration package at various customer beta sites.

## Export CIC 2.4/3.0 Configuration Data

This section describes exporting CIC 2.4/3.0 configuration data using Interaction Migrator.

## Interaction Migrator Installation

This section describes Interaction Migrator requirements and installation.

#### **About Interaction Migrator**

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

As part of the migration from CIC 2.4/3.0 to CIC 2015 R1 or later, you can use Interaction Migrator to:

- Export CIC 2.4/3.0 configuration data and custom handlers and import them to a CIC 2015 R1 or later server. The version of Interaction Migrator included in the current release of the CIC 2.4/3.0 to CIC 2015 R1 or later migration package supports migrating Interaction Dialer, Interaction Conference, and Interaction Director configuration data on the CIC server along with the CIC configuration data.
- Export Interaction Media Server 3.0 certificates, configuration data, and resources and import them to an Interaction Media 2015 R1 or later server. Genesys introduced support for Interaction Media Server with the initial release of the CIC 2.4/3.0 to CIC 4.0 migration package.

**Use with care**: Genesys tested this tool extensively both internally and at customer beta sites. However, the complexities of customized systems can create unforeseen variables that this tool may not handle. Ensure that you backed up any system on which you plan to run this tool. Have a well-designed *and exercised* back out plan and a thorough test plan to verify all functions processed using this tool.

#### Interaction Migrator-related documentation

- This CIC Migration Guide contains the complete instructions for migrating from CIC 2.4/3.0 to CIC 2015 R1 or later.
- The Interaction Migrator Technical Reference contains information about using Interaction Migrator for other migration scenarios, and for recovery and version control. It also contains instructions for using Interaction Migrator Console, an MS-DOS version of Interaction Migrator that uses command-line switches to export and import the configuration data. The Interaction Migrator Technical Reference is available in the PureConnect Documentation Library.

#### Interaction Migrator version information

The tools in the latest supported migration package support the latest CIC release and patch. The CIC Database Migration Assistant and Interaction Migrator installs indicate the CIC release version, for example, Migrator\_2015\_R2.msi. The CIC Database Migration Assistant and Interaction Migrator installs no longer contain the build version number in the install filename. However, once installed, the build version number is still available on the **Welcome** page in the lower right corner.

#### 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\CIC\Migrator		
Interaction Media Server 3.0	C:\Program Files\Interactive Intelligence\Migrator		
Interaction Media Server 2015 R1 or later	C:\Program Files (x86)\Interactive Intelligence\Migrator		

#### Interaction Migrator Tracing

Interaction Migrator uses the same tracing functionality as CIC 2015 R1. The Interaction Migrator install includes the trace configuration and log viewer utilities. The default output directory for the trace logs is the <code>inin\_tracing</code> folder under the user's temp directory (<code>%temp%\inin\_tracing</code>.) Tracing is always on by default and logs generate only when Interaction Migrator is running.

#### **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 runs 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, reset the values after the import. The reason is that these structured parameters are encrypted with a computer-specific key that the Admin Server generated.

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.

#### Encryption

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

#### Fulfil Microsoft .NET Framework 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 that the CIC version supports.

- PureConnect 2018 R4 or later and Interaction Media Server 2018 R4 or later require Microsoft .NET Framework 4.7 or later and Microsoft .NET Framework 3.5.1. For more information, see <u>https://help.genesys.com/cic/desktop/software\_requirements.htm</u>.
- CIC 2015 R1 through 2018 R3 and Interaction Media Server 2015 R1 through 2018 R3 require Microsoft .NET Framework 4.5.2 or later and Microsoft .NET Framework 3.5.1. For more information, see <a href="https://my.inin.com/products/cic/Pages/Software-Requirements.aspx">https://my.inin.com/products/cic/Pages/Software-Requirements.aspx</a>.
- CIC 3.0 and Interaction Media Server 3.0 require Microsoft .NET Framework 3.0. For more information, see <a href="https://my.inin.com/products/ic30/Pages/Software-Requirements.aspx">https://my.inin.com/products/ic30/Pages/Software-Requirements.aspx</a>.
- Pre-CIC 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. There are no pre-Interaction Media Server 3.0 versions so this bullet point doesn't apply to Interaction Media Server.

#### **Interaction Migrator Installation**

Install Interaction Migrator on the CIC 2.4/3.0 server so that you can export the configuration data, as described in <u>Install Interaction</u> <u>Migrator</u>. <u>Migrate Interaction Media Server 3.0</u> also refers to this procedure for installing Interaction Migrator on Interactive Media Server 3.0 and Interactive 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.

## Export CIC 2.4/3.0 Configuration Data

This section describes exporting CIC 2.4/3.0 configuration data using Interaction Migrator.

#### CIC configuration data migration export

The current release of the CIC 2.4/3.0 to CIC 2015 R1 or later 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. A future release of the migration package will contain an extra tool that supports migrating users and CIC configuration data at different times (phased migration).

#### Interaction Dialer configuration data migration

Interaction Migrator exports and imports Interaction Dialer 2.4/3.0 configuration data along with the CIC 2.4/3.0 configuration data.

#### Multiple CIC/ODS servers (CIC 4.0)

The current release of the CIC 2.4/3.0 to CIC 4.0 migration package supports only one-to-one ODS server migrations. Multiple CIC/ODS server environments must create a 2015 R1 or later CIC/ODS server for each existing 2.4/3.0 CIC/ODS server and run Interaction Migrator to migrate the CIC and Interaction Dialer configuration data on a one-to-one basis.

#### **Run the Interaction Recorder Migration Prep Utility**

If you use Interaction Recorder, you may need to run the Interaction Recorder Migration Prep Utility before exporting CIC data. The Interaction Recorder Migration Prep Utility moves the Interaction Recorder category configuration into Directory Services. This process is necessary so that Interaction Migrator can generate the required security and retention policies when you import the CIC data.

#### Who should run the Interaction Recorder Migration Prep Utility?

If you use Interaction Recorder, run the utility under the following conditions:

CIC 3.0 to CIC 2015 R1 or later migrations:

- If you are on a CIC 3.0 version earlier than CIC 3.0 SU 14, run the Interaction Recorder Migration Prep Utility 3.0.
- If you are on CIC 3.0 SU 14 or later, you don't need the Interaction Recorder Migration Prep Utility 3.0.

#### **Run the Interaction Recorder Migration Prep Utility**

- 1. Ensure that the CIC server 3.0 is running and connected to the database.
- 2. Locate the Interaction Recorder Migration Prep Utility zip file, for example, IRMigrationPrep\_30.zip, on the Migration .iso.
- 3. Richt-click the .zip file and save it.
- 4. Extract the contents of the Interaction Recorder Migration Prep Utility zip file to any location **except** where you have CIC server installed (for example, do not install to \I3\CIC\Server.)
- 5. Open the folder where you extracted the .zip file, type IRSvrCategoryU.exe, and then press Enter. After the utility runs, a message displays indicating the process is complete.



- 6. Click Start -> Run, type DSEDITU.exe, and the press Enter.
- 7. In the DSEdit window, in the Interaction Recorder object class, verify that the CategoryXML attribute exists.

ie Edic Tree Eŭtry Attribute Aie	w Telb			
x 🖻 🖻 🔗 🔋				
<root entry=""></root>				
<ul> <li>CustomerSite</li> </ul>	Entry path: \CustomerSite\Produ	ction/Inte	raction	Recorder
Production				
Account Codes	Object class: Interaction Recorder			
Client Buttons				
<ul> <li>Client Configuration</li> </ul>	Attribute Name	Type	#	Value
Client Memos	Archived Num Daus To Keep Data	String	1	194
Collective	Capture Bate	String	1	0
<ul> <li>Components</li> </ul>	CategoriXMI	String	1	Comparison (2010) Compariso
-Configuration	Color Depth	String	1	0
Default Liser	Compression Format	String	1	64
Interaction Ontiminer	Compression Queue Length	String	1	100
Interaction Optimizer	Data Purging Time of Day	String	1	946711800
+ Interaction Recorder	Database Poll Rate	String	1	60
Interaction Tracker	Date Created	String	1	1214600750
InternationalStrings	Date Last Modified	String	1	1214600750
IntlSequenceStrings	Default Compressed Recordings Di	String	1	\\qf-nexus\share\recordings
Menus	Disallow recording of external only	String	1	No
- Paging Carriers	Enable Data Purging	String	1	No
+-Password Policies	Enable Recording	String	1	Yes
E-OF-BOGGLE	IR Client Reply-To E-mail Address	String	1	1
E Deles	Lag time	String	1	120
Roles	Mouse Capture Multiplier	String	1	4
+- Schedules	Notes	String	1	Modified by IC Setup Assistant.
<ul> <li>SequenceStrings</li> </ul>	Num Days To Keep Data	String	1	184
	Process Recordings	String	1	Yes
Users	Process SiteIDs	String	3	1,2,9
<ul> <li>Workgroups</li> </ul>	UNaires	String	2	"Anne-Louise File\Test for Diech", "Enhancing Customer Exp
Wrap-up Codes	Second Consult Transfer Bu Consul	Shoo	1	947
		_	_	

#### Handler pre-migration procedures

Interaction Migrator does not publish or manage custom handlers. If you use custom handlers, follow the handler pre-migration procedures in <u>Migrate CIC 2.4/3.0 Handlers</u> before exporting the CIC 2.4/3.0 configuration data.

#### **Complete Interaction Dialer pre-migration procedures**

Before you run Interaction Migrator to export the CIC and Interaction Dialer 2.4/3.0 configuration data, complete the following Interaction Dialer migration requirements. When you run Interaction Migrator to export the CIC configuration data, it asks for the location of the UDL files and the Dialer configuration file to extract the information it needs to export the Dialer configuration data.

Note: Genesys recommends copying these files directly from the CIC server to the CIC/ODS server, rather than using a network share.

#### Copy the UDL folder from the CIC server to the CIC/ODS 2.4/3.0 server

- 1. Copy the UDL folder from <code>\i3\CIC\server\UDL</code> on the CIC server.
- 2. Create an \i3\CIC\server\UDL directory on the CIC/ODS server and place the UDL folder in that directory.
- 3. Interaction Migrator looks in the exact location that you specify so match your path names carefully.

#### Copy the Dialer configuration file from the CIC server to the CIC/ODS 2.4/3.0 server

- 1. Copy the Dialer configuration file (dialer\_config.xml) from the \i3\CIC\server directory on the CIC server.
- 2. Place the Dialer configuration file in the i3\CIC\server directory on the CIC\ODS server. Interaction Migrator looks in the exact location that you specify so match your path names carefully.

#### Export CIC 2.4/3.0 configuration data using Interaction Migrator

This procedure describes how to export CIC 2.4/3.0 configuration data using Interaction Migrator.

**Interaction Dialer**: If this is a CIC/ODS server, Interaction Migrator asks for the location of the Dialer configuration file so that you can specify the Dialer configuration data to export.

#### To export CIC 2.4/3.0 configuration data:

1. Stop CIC Service.

**Note:** Though not required on export, Genesys recommends that you stop CIC Service on the CIC 2.4/3.0 server before starting Interaction Migrator to avoid a switchover or any call interruptions. If running in a switchover pair, you can stop your backup server and do the export on that computer. If you cannot stop CIC Service, the alternative is to run Interaction Migrator Console. For more information, see the <u>Interaction Migrator Technical Reference</u>.

- 2. Start Interaction Migrator on the CIC 2.4/3.0 server, either from the Interaction Migrator link on the desktop, or from **Start-**>**Programs->Interactive Intelligence->Interaction Migrator**.
- 3. On the Welcome page, click Next.

Ð	Interaction Migrator
	Welcome to Interaction Migrator for CIC
o°o°	The Interaction Migrator is a wizard-based tool that exports and imports configuration data related to the CIC Server, Interaction Media Server, and other components of the Customer Interaction Center. Interaction Migrator is version independent. It can be used as part of a migration from one CIC release to another, or for recovery and version control. To continue, click Next.
<mark>e</mark> genesys <sup>-</sup>	<mark>Zip and Email Logs.</mark> Build 0.0.0.0
	< <u>B</u> ack <u>N</u> ext > <u>C</u> ancel

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

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

0	Interaction Migrator	×
Genesys Interactio	on Migrator	00
	Which task would you like to perform?	
	<ul> <li>Import configuration data</li> <li>Export configuration data</li> </ul>	
	< <u>B</u> ack <u>N</u> ext >	<u>C</u> ancel

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

#### Notes:

- Genesys recommends that you keep **Select All** selected (default) to export all data components.
- When you export users, you must also export workgroups to include workgroup memberships in the export.
- The data components listed differ depending on the CIC version installed on the CIC server.

ł	Interaction Migrator	X
Genes Int	<b>vs</b> eraction Migrator	00°
	Select the data you would like to export.	
	<ul> <li>Dialer Configuration</li> <li>Media Server Certificate Files</li> <li>Media Server Configuration File</li> <li>Resources</li> <li>Server Certificate Files</li> </ul>	
	Select All	
	< Back Next >	Cancel

6. On the **Configuration** page, specify the directories for the exported data and custom handlers and then click **Next**.

12	Interaction Migrator	X
Genesys Interacti	ion Migrator	00°
	Where would you like to save the exported configuration data?	
	Set password for export file:	
	< Back Next >	Cancel

#### 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.

#### Important!

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

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

Open the folder that contains the custom handlers. The CIC 4.0 install creates the **\l3\IC\Handlers\Custom** folder by default. You can use this folder or specify one you that created. Interaction Migrator includes all subdirectories 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, select 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.

	and the second
Genesys Interaction Migrator	00°
Export Confirmation Export File Path:C:\Users\echo_user\Desktop The following nodes will be exported: Dialer Configuration Media Server Certificate Files Media Server Configuration File Resources Server Certificate Files	Cancel

**Note:** To change any selections, click **Back**. After you complete your changes, start the export process again. Interaction Migrator creates a CIC configuration data file.

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

	Interaction Mi	grator	
Interacti	on Migrator		00°
Export	Status		
	2 of 88) Exporting C: Program Files (x86) Unter 3 of 88) Exporting C: Program Files (x86) Unter 4 of 88) Exporting C: Program Files (x86) Unter 5 of 88) Exporting C: Program Files (x86) Unter 6 of 88) Exporting C: Program Files (x86) Unter 7 of 88) Exporting C: Program Files (x86) Unter 8 of 88) Exporting C: Program Files (x86) Unter 9 of 88) Exporting C: Program Files (x86) Unter 9 of 88) Exporting C: Program Files (x86) Unter	active Intelligence/Resources/Bus active Intelligence/Resources/Bus active Intelligence/Resources/Bus active Intelligence/Resources/Bus active Intelligence/Resources/Bus active Intelligence/Resources/Bus active Intelligence/Resources/Bus active Intelligence/Resources/Bus	200 200 200 200 200 200 200 200 200 200
	10 of 88) exporting C: Program Files (x86) (inte 11 of 88) Exporting C: Program Files (x86) (inte III	eractive Intelligence/Resources/Bu eractive Intelligence/Resources/Bu	sy SM ~
() () () ()	III of 88) Exporting C. Program Files (x86) (inte III of 88) Exporting C. Program Files (x86) (inte III	eractive Intelligence/Resources/Bu eractive Intelligence/Resources/Bu	sy >> >
() () () () () () () () () () () () () (	III of 88) Exporting C. Program Files (x86) lints	eractive Intelligence/Resources/Bu eractive Intelligence/Resources/Bu Stop	

The export process can take several minutes, depending on the amount of data that Interaction Migrator is exporting.

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

8. (Interaction Dialer only) If this is a CIC/ODS server, the Dialer Configuration Migration page displays.

Dialer Configuration	Migration	
Source configuration file:		Browse Load
,		Create migration package

Browse to the location of the Dialer configuration file (dialer\_config.xml) that you placed on the CIC/ODS server and click Load.

The contents of the Dialer configuration file appear on the Dialer Configuration Migration page.

9. (Interaction Dialer only) Expand the contents of the Dialer configuration file.

- All data components are selected by default. Genesys recommends keeping the default selection.
- The data components listed differ depending on the ODS version installed on the CIC server.

📌 Dialer Configuration Migration	
Source configuration file: //\qf-mule\IC\Server\dialer_config.xml	BrowseLoad
🖃 🗹 Configuration	
En Campaigns	
E TestCamp1	
🖻 🔽 SQL 2005 Testing Campaign1	
🔽 Sql2005 Workflow	
🗹 SQL2005All	
⊡ 🖸 sql 2005 Test 2	
Er V Uracle Lest1 Campaign	
Er M Dialer Campaign	
🖃 🗹 Filters	
- 🔽 13: Washington DC Survey	
🔽 13: Los Angeles Survey Region	
I3: Revenue Low	
III I3: Revenue High	
I II. Nevenue Medium	
Phone Number Types	
🕀 🗹 Rule Sets	
🔁 🗹 Schedules	
Scripts	
Er Skill Sets	<b>_</b>
	Create migration package
	Create migration package

10. (Interaction Dialer only) Click Create migration package to add the selected Dialer data components to the CIC configuration file. Click **OK** when the following message appears:

×
Migration package successfully created.
ОК

The Interaction Migrator **Export Status** page displays again. 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.

11. Click **Next** to continue.

			Intera	action Mig	grator			
ienesy: Inter	s raction Migra	tor						00°
Ex	port Status							
	<ul> <li>(80 of 88</li> <li>(81 of 88</li> <li>(82 of 88</li> <li>(83 of 88</li> <li>(84 of 88</li> <li>(85 of 88</li> <li>(86 of 88</li> <li>(87 of 88</li> <li>Exporting</li> </ul>	I) Exporting ( I) Exporting ( Resources	C Program File C Program File C Program File C Program File C Program File C Program File	es (x86)Vinter es (x86)Vinter es (x86)Vinter es (x86)Vinter es (x86)Vinter es (x86)Vinter es (x86)Vinter	active Intellige active Intellige active Intellige active Intellige active Intellige active Intellige active Intellige	nce'Resource nce'Resource nce'Resource nce'Resource nce'Resource nce'Resource nce'Resource	ISV3ttsV ~ ISV3ttsV ISV3ttsV ISV3ttsV ISV3ttsV ISV3ttsV ISV3ttsV ISV3ttsV ISV3ttsV	
	the second states and	CONTROL VOIL	annowice a more.				~	
	<	ш					>	
	Configuration 0920201710 Process Corr	III n Data Export 15730.ininmigr npleted in 0h	ted to C:\Usen r 7m 27s	s\echo_user	\Desktop\ech	0_	>	

The CIC configuration data file name is unique. It consists of the server name combined with a date/time stamp: ServerName\_ DateTimeStamp.ininmigr. If the migration doesn't complete successfully, multiple export files are created
instead of the single .ininmigr file.

Interaction Dialer: The CIC configuration data file includes the Interaction Dialer configuration data.

12. Click **Finish** to close Interaction Migrator.

0	Interaction Migrator	X
ooo	Interaction Migrator for CIC	has finished!
Senesys <sup>-</sup>	To close this Wizard, click Finish.	Zip and Email logs,
	< Back	Finish Cancel

**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 PureConnect Customer Care.

- 13. If you stopped CIC Service, restart it.
- 14. To prepare for the import procedure, locate the resulting CIC configuration data file

(ServerName\_DateTimeStamp.ininmigr) on the CIC 2.4/3.0 server and copy the file to a USB key or other writeable storage location.

Genesys recommends this method of copying the CIC configuration data file to the installation media to make it easier to copy the file to the CIC 4.0 servers.

## **Prepare the CIC Server Environment**

This section describes the procedures for preparing the CIC server environment for the migration.

## CIC 2015 R1 or later server hardware requirements for CIC

For minimum and recommended hardware requirements for the CIC 2015 R1 or later server, see CIC Server in the <u>PureConnect</u> <u>Installation and Configuration Guide</u> in the <u>PureConnect Documentation Library</u>.

For information about deploying the CIC server on a virtual platform, see the <u>CIC Virtualization Technical Reference</u> in the <u>PureConnect Documentation Library</u>.

## PureConnect 2018 R4 or later server software requirements for CIC

Ensure that you fulfilled the CIC server software requirements, including pre- and post-Windows OS installation, described in "CIC Server" in the <u>PureConnect Installation and Configuration Guide</u> in the <u>PureConnect Documentation Library</u>. Following is a summary of the PureConnect 2018 R4 or later server software requirements.

#### **Microsoft Windows OS**

- Microsoft Windows Server 2016 (64-bit)
- Microsoft Windows Server 2012 R2 (64-bit)

#### **Microsoft .NET Framework**

- Microsoft .NET Framework 4.7 or later
- Microsoft .NET Framework 3.5.1

## CIC 2015 R1 through 2018 R3 server software requirements for CIC

Ensure that you fulfilled the CIC server software requirements, including pre- and post-Windows OS installation, described in "CIC Server" in *PureConnect Installation and Configuration Guide* in the <u>PureConnect Documentation Library</u>. Following is a summary of the CIC 2015 R1 through 2018 R3 server software requirements.

#### **Microsoft Windows OS**

- Microsoft Windows Server 2012 R2 (64-bit)
- Microsoft Windows Server 2008 R2 SP1 (64-bit)

#### **Microsoft .NET Framework**

- Microsoft .NET Framework 4.5.2 or later
- Microsoft .NET Framework 3.5.1

## Database server requirements CIC 2015 R1 or later

Before beginning the CIC 2015 R1 or later server installation, ensure that you fulfilled the requirements for the 2015 R1 or later database server. You create the CIC 2015 R1 or later database as part of the CIC 2015 R1 or later server installation. For more information about the requirements, see *Database Server* in the <u>PureConnect Installation and Configuration Guide</u>.

CIC 2015 R1 or later supports the following database platforms:

- Microsoft SQL Server 2016 (on Windows Server 2012 R2)
- Microsoft SQL Server 2014 (on Windows Server 2012 R2)
- Microsoft SQL Server 2012 (on Windows Server 2012 R2)
- Microsoft SQL Server 2008 R2 SP 1 and SP 2 (32- and 64-bit)
- Oracle 11g R2 (32- and 64-bit) 11.2.0.1.0 database with 11.2.0.1.0 client

**Note:** For known issues with Oracle client 11.2.0.1.0, see KB article: <u>https://my.inin.com/products/pages/kb-details.aspx?</u> <u>entryid=q139584425402029</u>.

- Oracle 11g R2 (64-bit) 11.2.04.0 database with 11.2.0.4.0 client
- Oracle 11g R2 (64-bit) 11.2.0.3.0 database with 11.2.0.3.0 client

#### Important!

There are known issues with the CIC Database Migration Assistant and the Oracle 11.2.0.3.0 client. Genesys recommends using one of the earlier Oracle versions on the CIC Database Migration Assistant client computer.

- Oracle 11g R2 (64-bit) 11.2.0.2.0 database with 11.2.0.2.0 client
- Oracle 11g R2 (32- and 64-bit) 11.2.0.1.0 database with 11.2.0.1.0 client

**Note:** For known issues with Oracle client 11.2.0.1.0, see KB article: <u>https://my.inin.com/products/pages/kb-details.aspx?</u> <u>entryid=q139584425402029</u>.

#### 32-bit versions of SQL Server and Oracle supported but not recommended

The migration supports 32-bit versions of Microsoft SQL Server and Oracle, but Genesys doesn't recommend them because of limited memory availability. Use the 32-bit version as a temporary step toward the 64-bit version.

#### SQL Server 2000 SP4 to SQL Server 2012 upgrades not supported

Due to a driver incompatibility with Microsoft SQL Server Native Client 11.0, upgrades from SQL Server 2000 SP4 to SQL Server 2012 are not successful. Customers who wish to upgrade from SQL Server 2000 to SQL Server 2012 must follow one of these workarounds:

- Upgrade from SQL Server 2000 to SQL Server 2005/2008, and then create a backup of the database and restore it to the SQL Server 2012 instance.
- Upgrade from SQL Server 2000 to SQL Server 2005/2008, and then detach the database and reattach it to the SQL Server 2012 instance.

### CIC 2015 R1 or later server installation

For the purposes of the migration, the CIC 2015 R1 or later server installation:

- Installs a new CIC 2015 R1 or later server with default settings and configurations. Later, you migrate the CIC 2.4/30 settings and configurations to the CIC 2015 R1 or later server using Interaction Migrator, as described in <u>Import CIC 2.4/3.0</u> <u>Configuration Data</u>.
- Creates a CIC 2015 R1 or later database. Later, you migrate the CIC 3.0 data to the CIC 2015 R1 or later database using CIC Database Migration Assistant, as described in Migrate the CIC 3.0 Database.

To install the CIC 2015 R1 or later server and create the CIC 2015 R1 or later database, follow the instructions in "CIC Server Installation" and "CIC Setup Assistant" in the *PureConnect Installation and Configuration Guide*.

#### Make recommended selections in CIC Setup Assistant for migrations

Select the following in CIC Setup Assistant for migrations:

- Choose the default settings as often as possible.
- Do not create dial plan, stations, users, workgroups, roles, or auto-attendant menu.
- On the **Database Configuration**-related pages, provide the appropriate information for your CIC 2015 R1 or later database server.
- On the Configure the CIC Database Name pages, click Create a new CIC database.

Note: Do not select the Upgrade an existing database option.

🌇 IC Setup Assistant	? ×
<b>Configure the IC Database Name</b> The IC database name specifies where all IC generated data	a will be stored.
Select whether to create a new IC database on your databa existing IC database.	ase server or to use an
ullet Create a new 4.0 database with the following name:	J3_IC
🔘 Use an existing database:	
O Upgrade an existing database:	
< Back	Next > Cancel

• On the CIC Setup Assistant Completed page, accept the default setting of Yes, I want to restart my computer now.

## Change site ID on CIC 2.4/3.0 servers

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 configuration data.

Following the completion of CIC Setup Assistant, complete the following procedure for each CIC 2.4/3.0 server that you plan to consolidate.

#### To change the site ID on a CIC 2.4/3.0 server:

- 1. Contact PureConnect Customer Care to obtain a script that allows you to change the site ID of historical records. Run this script before continuing with the rest of this procedure.
- 2. On the CIC 2.4/3.0 server, start CIC Service.
- 3. After CIC Service starts, open Interaction Administrator.
- 4. In the Collective container, click Home Site.
- 5. In the right-side pane, double-click **Configuration**.
- 6. In the **Home Site Configuration** dialog box, in the **Site Identifier** box, type a unique site ID and then click **OK**.

ŀ	Iome Site Configuration	1		? ×
	Home Site Configuration	Custom Attributes History		1
	Site Identifier:	0	Note ID Dial String Digits:	
	Password:			
	Confirm:			
		Activate this site to particip	ate in a multi-site configuration.	
			OK Cancel g	Apply

7. In the **People** container, click **Users**.

8. In the right-side pane, double-click the user name associated to the domain user account used to run the CIC server installation.

9. In the User Configuration dialog box, if the Extension, Password, and Mailbox User aren't already configured, type the information in the boxes and then click OK.

## Change site ID on the CIC 2015 R1 or later server

Before importing configuration data, 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. Interaction Migrator does not allow you to import users whose site ID matches the site ID of the CIC 2015 R1 or later server.

#### To change the site ID on the CIC 2015 R1 or later server:

- 1. On the CIC 4.0 server, start CIC Service.
- 2. After CIC Service starts, open Interaction Administrator.
- 3. In the Collective container, click Home Site.
- 4. In the right-side pane, double-click Configuration.
- 5. In the **Home Site Configuration** dialog box, in the **Site Identifier** box, type a site ID that differs from the CIC 3.0 server site ID and then click **OK**.

Home Site Configuration			? ×
Home Site Configuration Custom	Attributes History		
Site Identifier:		Note ID Dial String D	igits:
Password:			
Confirm:			
- Act	ivate this site to participate	e in a multi-site config	guration.
	L	OK	Cancel <u>Apply</u>

#### **Install Interaction Migrator**

#### Important!

Ensure that you install the appropriate version of Interaction Migrator. For more information, see <a href="https://my.inin.com/products/cic/Pages/Migrations.aspx">https://my.inin.com/products/cic/Pages/Migrations.aspx</a>)

#### To install Interaction Migrator:

- 1. Ensure that you installed the appropriate Microsoft .NET Framework version on the CIC server or Interaction Media Server. Otherwise, the Interaction Migrator install asks 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.

#### Important!

Ensure that you install the appropriate version of Interaction Migrator.

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 <a href="https://my.inin.com/products/cic/Pages/Migrations.aspx">https://my.inin.com/products/cic/Pages/Migrations.aspx</a>.

- 5. Locate the Interaction Migrator install .msi file, for example, Migrator\_2015\_R2.msi, on the Migration .iso and doubleclick it.
- 6. On the **Welcome** page, click **Next**.

剴 Interactio	on Migrator for CIC	Setup 🗕 🗖 🗙
	Welcome to the Inter Setup Wizard for CIC	raction Migrator
ő	The Setup Wizard will install Interaction Migrator for CIC on your computer. Click Next to continue or Can to exit the Setup Wizard.	
<mark>ଟ୍</mark> ଚ GENESYS <sup>™</sup>		
	Back	Next Cancel

7. On the Custom Setup page, click Next. Genesys recommends that you keep the default location.

<u>ی</u>	Interaction Migrator for CIC	Setup	_ 🗆 🗙
Custo	m Setup It the way you want features to be installed.		00
Click the	e icons in the tree below to change the way features w Thteraction Migrator	Exports a configural custom ha	nd imports IC tion data and andlers.
		This feat. on your h	ire requires 20MB ard drive.
Locatio	n: C:\Program Files (x86)\Interactive Intelli	gence\	
	Reset Disk Usage Back	Next	Cancel

8. On the Ready to Install Interaction Migrator page, click Install.
| 1 | Interaction Migrator for CIC Setup   | _ 🗆 X  |
|---|--|--------|
|   | Ready to install Interaction Migrator for CIC  | 00     |
|   | Click Install to begin the installation. Click Back to review or change any of ye<br>installation settings. Click Cancel to exit the wizard. | bur    |
|   |  |        |
|   | Back Install   | Cancel |

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

10 Interaction	on Migrator for CIC Setup 🗕 🗖 🗙
	Completed the Interaction Migrator Setup Wizard for CIC
o°	Click the Finish button to exit the Setup Wizard.
<mark>ଟ୍ଟ</mark> GENESYS <sup>™</sup>	
	Back Finish Cancel

The install places the Interaction Migrator run file in the \I3\CIC\Migrator folder. The install also places an Interaction Migrator link on the desktop and under **Start->Programs->PureConnect->Interaction Migrator**.

# Prepare the Interaction Dialer 2015 R1 or Later Server Environment

This section is for Interaction Dialer sites only. It describes the procedures for preparing the Interaction Dialer 2015 R1 or later CIC and ODS server environment for the migration.

# CIC 2015 R1 or later server hardware requirements for Dialer

For minimum and recommended hardware requirements for the CIC 2015 R1 or later server, see "CIC Hardware and Software Requirements" in the *Interaction Dialer Installation and Configuration Guide* in the <u>PureConnect Documentation Library</u>.

# CIC 2015 R1 or later server software requirements for Dialer

Ensure that you fulfilled the CIC server software requirements described in "CIC Hardware and Software Requirements" in the *Interaction Dialer Installation and Configuration Guide* in the <u>PureConnect Documentation Library</u>.

# **Database server requirements**

In most cases, the database server (Microsoft SQL Server or Oracle) can be installed on the CIC server. Interaction Dialer 2015 R1 or later supports the same databases and database versions as CIC 2015 R1 or later.

The only exception is for an Oracle 11g R2 (64-bit) database. In this case, the database server must be installed on a separate server from the CIC server, and an Oracle (32-bit) client must be installed on the CIC server.

# Additional database server requirements for Interaction Dialer

This section discusses additional database server requirements for Interaction Dialer 2015 R1 or later for Microsoft SQL Server and Oracle.

For complete instructions, see the CIC Hardware and Software Requirements in the <u>Interaction Dialer Installation and Configuration</u> <u>Guide</u> in the <u>PureConnect Documentation Library</u>.

# Microsoft SQL Server 2008 R2 Command Line Utilities (x64)

If your database server is a **Microsoft SQL Server**, you must also ensure the **Microsoft SQL Server 2008 R2 Command Line Utilities** (**x64**) is installed on the CIC server, even if the DBMS is installed on a separate computer from the CIC server.

The **Microsoft SQL Server 2008 R2 Command Line Utilities (x64)** includes a BCP utility that bulk copies data between an instance of Microsoft SQL Server 2008 R2 and a data file in user-specified format. This utility can import large numbers of new rows into SQL Server tables, or to export data from tables into data files.

#### Important!

If the Microsoft SQL Server 2008 R2 Command Line Utilities (x64), and therefore the BCP utility, is not present, Dialer cannot import or export data from a contact list. The administrator must ensure this utility is present to ensure contact lists are usable.

# **Oracle Database Utilities**

Oracle Database Utilities, included with the Oracle Client install, is required for Interaction Dialer 2015 R1 or later using an Oracle database:

- On the ODS server if you plan to run reports
- On the CIC server for the UDL file to obtain the Oracle connections

Download the Oracle client appropriate for the Oracle version you plan use from <a href="http://www.oracle.com/technetwork/database/enterprise-edition/downloads/index.html">http://www.oracle.com/technetwork/database/enterprise-edition/downloads/index.html</a>.

# Install the CIC 2015 R1 or later server

To install the CIC 2015 R1 or later server, see "Central Campaign Server Install" in the <u>Interaction Dialer Installation and</u> <u>Configuration Guide</u> in the <u>PureConnect Documentation Library</u>.

# Create a UDL file for the new 2015 R1 or later database

A database connection file (.UDL) is required to ensure Interaction Dialer works cooperatively with your company's database system if the CIC database contains a contact list. The UDL file resides on the Central Campaign Server (CCS).

Create a UDL file using Microsoft's Data Link Properties utility to define an OLE DB data source that connects a database server with applications. Create the UDL file before adding a Dialer database connection. If needed, create a user with the appropriate permissions as the CIC administrator account may not have the appropriate permissions.

For complete instructions, see "Create a UDL File" in <u>Interaction Dialer Installation and Configuration Guide</u> in the <u>PureConnect</u> <u>Documentation Library</u>.

# ODS 2015 R1 or later server software requirements

Before you begin the ODS 2015 R1 or later server installation, ensure that you installed the CIC 2015 R1 or later server as described in <u>Prepare the CIC 2015 R1 or later Server Environment</u>.

Here is a summary of the ODS 2015 R1 or later server software requirements:

- CIC 2015 R1 or later
- Interaction Dialer 2015 R1 or later

For complete instructions on completing ODS 2015 R1 or later server software requirements, see "ODS hardware and software requirements" in the <u>Interaction Dialer Installation and Configuration Guide</u> in the <u>PureConnect Documentation Library</u>.

# Install the ODS 2015 R1 or later server

To install the ODS 2015 R1 or later server, see "Outbound Dialer Server Install" in <u>Interaction Dialer Installation and Configuration</u> <u>Guide</u> in <u>PureConnect Documentation Library</u>.

# Multiple CIC/ODS servers (CIC 2015 R1 or later)

The current release of the CIC 2.4/3.0 to CIC 2015 R1 or later migration package supports only one-to-one ODS server migrations. Multiple CIC/ODS server environments must create a 2015 R1 or later CIC/ODS server for each existing 2.4/3.0 CIC/ODS server. Follow the migration procedure instructions in this guide for each CIC/ODS server.

# Multiple CIC/ODS servers (CIC 2015 R1 or later)

The current release of the CIC 2.4/3.0 to CIC 2015 R1 or later migration package supports only one-to-one ODS server migrations. Multiple CIC/ODS server environments must create a 2015 R1 or later CIC/ODS server for each existing 2.4/3.0 CIC/ODS server. Follow the migration procedure instructions in this guide for each CIC/ODS server.

# Multiple CIC/ODS servers (CIC 2015 R1 or later)

The current release of the CIC 2.4/3.0 to CIC 2015 R1 or later migration package supports only one-to-one ODS server migrations. Multiple CIC/ODS server environments must create a 2015 R1 or later CIC/ODS server for each existing 2.4/3.0 CIC/ODS server. Follow the migration procedure instructions in this guide for each CIC/ODS server.

# **CIC Database Migration Assistant Installation**

Genesys recommends installing the CIC Database Migration Assistant package on the CIC Database Migration Assistant client computer at this stage in the migration scenario because it places various pre-migration tools and scripts on the CIC Database Migration Assistant client computer.

# **About CIC Database Migration Assistant**

# About the CIC Database Migration Assistant package

The CIC Database Migration Assistant package consists of the following components:

• The CIC Database Migration Assistant utility moves data from a CIC 3.0 database to a CIC 2015 R1 or later database. It supports migrations from CIC 3.0 to CIC 2015 R1 or later only.

Note: If you are migrating from CIC 2.4, upgrade to a CIC 3.0 database first as described in Prepare for CIC Database Migration.

- The CIC Database Migration Assistant for Dialer utility moves data from an Interaction Dialer 2.4 or 3.0 database to an Interaction Dialer 2015 R1 or later database.
- Oracle and SQL Server scripts for upgrading database schema manually before migrating the data.

**Use with care**: Genesys tested the CIC Database Migration Assistant extensively both internally and at customer beta sites. However, the complexities of customized systems can create unforeseen variables that this utility may not handle. Ensure that you backed up any system on which you plan to run this utility. Have a well-designed *and exercised* back out plan and a thorough test plan to verify all functions processed using this tool.

# **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 and Interaction Migrator installs indicate the CIC release version, for example, DBMigrationAssistant\_2015\_R2.msi. The CIC Database Migration Assistant and Interaction Migrator installs no longer contain the build version number in the install filename. However, once installed, the build version number is still available on the **Welcome** page in the lower right corner.

There may be instances when Genesys updates the 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 <a href="https://my.inin.com/products/Pages/Downloads.aspx">https://my.inin.com/products/Pages/Downloads.aspx</a> and updates the **Release Posted on** date.

# **Tracing (CIC Database Migration Assistant)**

CIC Database Migration Assistant uses the same tracing functionality as CIC 2015 R1 or later. The CIC Database Migration Assistant 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%tinin\_tracing). Tracing is always on by default and logs generate only when CIC Database Migration Assistant is running.

Note: If drive space is a concern on the server, turn tracing down to status level for Interaction Migration topics.

# **CIC Database Migration Assistant client computer**

You can install CIC Database Migration Assistant on most any computer; however, do **NOT** install CIC Database Migration Assistant on the CIC server.

# Fulfil Microsoft .NET Framework requirements for client computer

CIC Database Migration Assistant is built on the Microsoft .NET Framework. Ensure that you have the correct versions installed on the CIC Database Migration Assistant client computer before installing CIC Database Migration Assistant.

- PureConnect 2018 R4 or later requires Microsoft .NET Framework 4.7 or later and Microsoft .NET Framework 3.5.1.
- CIC 2015 R1 through 2018 R3 requires Microsoft .NET Framework 4.5.2 or later and Microsoft .NET Framework 3.5.1.

For more information about requirements, see https://help.genesys.com/cic/desktop/software\_requirements.htm.

## **Oracle client requirements**

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. The database migration requires the Oracle 11.2.0.2.0 client on the CIC Database Migration Assistant client computer. If CIC Database Migration Assistant does not run on the database server computer, you can use Oracle 11.2.0.3.0 and 11.2.0.4.0 clients on the database server computer. For this reason, Genesys recommends installing CIC Database Migration Assistant on a separate computer from the computer used for the 4.0 CIC database.

# **Install CIC Database Migration Assistant**

- 1. Ensure that you installed the appropriate Microsoft .NET Framework versions on the CIC Database Migration Assistant client computer.
- 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.
- 4. Locate the CIC Database Migration Assistant .msi file, for example, DBMigrationAssistant\_2015\_R2.msi, on the Migration .iso and double-click it.
- 5. On the Welcome page, click Next.

😥 IC Database Migratic	on Assistant for CIC 2018 R1 Setup
°00	Welcome to the IC Database Migration Assistant Setup Wizard for CIC 2018 R1 Please wait while the Setup Wizard prepares to guide you through the installation. Determining if the Windows Modules Installer service is running.
<mark>ଟ</mark> ୍ଚ GENESYS <sup>™</sup>	
	Back Next Cancel

6. On the Ready to Install CIC Database Migration Assistant page, click Install.

😥 IC Database Migration Assistant for CIC 2018 R1 Setup	_ <b>_</b> ×
Ready to install IC Database Migration Assistant for CIC 2018 R1	00°
Click Install to begin the installation. Click Back to review or change any of installation settings. Click Cancel to exit the wizard.	your
Back Install	Cancel

The Installing CIC Database Migration Assistant page displays the status of the install process.

10 Database Migration Assistant for CIC	2018 R1 Setup 🗕 🗖 🗙
Installing IC Database Migration Assistant R1	t for CIC 2018
Please wait while the Setup Wizard installs IC Dat 2018 R 1.	abase Migration Assistant for CIC
Status:	
Bac	k Next Cancel

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

😥 IC Database Migratio	on Assistant for CIC 2018 R1 Setup				
	Completed the IC Database Migration Assistant Setup Wizard for CIC 2018 R1				
ooo	Click the Finish button to exit the Setup Wizard.				
<mark>ଟ୍</mark> ଚ GENESYS <sup>-</sup>					
	Back Finish Cancel				

The CIC Database Migration Assistant install creates a C:\Program Files (x86)\Interactive Intelligence\CIC Database Migration Assistant folder containing the CIC Database Migration Assistant. The folder also contains CIC Database Migration Assistant for Dialer executables and the other pre-migration tools and scripts included in the CIC Database Migration Assistant package.

The CIC Database Migration Assistant install places the following shortcuts on the desktop:



CIC Database Migration Assistant



CIC Database Migration Assistant for Dialer

# Prepare for CIC Database Migration

This section describes the procedures to complete before migrating a CIC 3.0 database to a CIC 2015 R1 or later database using CIC Database Migration Assistant. At this point in the migration process, you should have already set up the CIC 2015 R1 or later server, created a CIC 2015 R1 or later database as part of the CIC 2015 R1 or later server installation, created a client computer for the migration, and installed CIC Database Migration Assistant on the CIC Database Migration Assistant client computer.

#### Notes:

- The current version of CIC Database Migration Assistant contains updated Oracle tools and scripts for CIC 2015 R1 and later.
- If your implementation includes Interaction Dialer, prepare for and migrate the CIC database first as described in <u>Prepare for CIC</u> <u>Database Migration</u> and <u>CIC 3.0 Database Migration</u> before preparing for and migrating the Interaction Dialer database.

# Prepare the CIC Database Migration Assistant client computer

This section describes how to prepare the CIC Database Migration Assistant client computer by installing the appropriate database server client.

## Install Microsoft SQL Server 2008 Management Studio

If you are migrating a SQL Server database, the migration requires SQL Server client to run CIC Database Migration Assistant on the CIC Database Migration Assistant client computer.

Microsoft SQL Server 2008 Management Studio includes the SQL Server client. To install Microsoft SQL Server 2008 Management Studio, do one of the following:

- Use the SQL Server 2008 R2 install media (disc/ISO/unpacked files on hard drive) to install the standard SQL Server 2008 Management Studio (SSMS).
- Download and install the SQL Server 2008 R2 Management Studio Express (SSMSE) from: <u>http://www.microsoft.com/en-us/download/details.aspx?id=22985</u>.

#### Install Oracle Administrator Client

If you are migrating an Oracle database, the migration requires Oracle Administrator Client with SQL Plus to run CIC Database Migration Assistant on the CIC Database Migration Assistant client computer.

**Note:** If the Oracle server is the CIC Database Migration Assistant client computer, it is not necessary to install the Oracle Administrative Client software.

Download the Oracle client appropriate for the Oracle version you plan to use from <u>http://www.oracle.com/technetwork/database/enterprise-edition/downloads/index.html</u>.

Note: In the Select Installation Type dialog box, ensure that you select Administrator as the installation type.

SQL Plus relies on the ORACLE\_HOME environment variable. If the ORACLE\_HOME environment variable isn't set, set it to point to the directory where you installed the Oracle software.

# Upgrade the 2.4 or 3.0 database schema

#### Changes to database schema in CIC 4.0 SU 3 and later

Genesys enhanced the CIC 2015 R1 or later database schema in Service Update 3 (and later) to add key constraints in all tables. These new constraints ensure the highest level of data integrity possible. To migrate CIC 3.0 data into a CIC 4.0 SU 3 or later database, resolve any inconsistencies in the source data first.

Genesys updated the tools and scripts that comprise the CIC Database Migration Assistant to include duplicate/null cleanup scripts and processes. When run, they address any issues that might exist in the CIC 3.0 source data, helping to ensure a successful migration to the database schema in CIC 4.0 SU 3 and later.

## Upgrade the CIC 2.4 or 3.0 database schema to the most recent CIC 3.0 database schema (SQL Server)

#### Manually run the database schema upgrade scripts (SQL Server)

For SQL Server customers, run the scripts from within SQL Server 2008 Management Studio.

#### Upgrade the CIC 2.4/3.0 database schema to the most recent CIC 3.0 database schema (SQL Server)

The 3.0 SQL Server scripts are in the CIC Database Migration Assistant\Scripts\sqlserver\source directory, but you must run them from within SQL Server 2008 Management Studio.

Run the scripts in the following order, one after another. Don't run them at the same time.

- 1. ICUpgrade.sql
- 2. TrackerUpgrade.sql
- 3. TrackerBuild.sql
- 4. IRBuild.sql
- 5. OptimizerBuild.sql
- 6. CSSurveyBuild.sql
- 7. WorkflowBuild.sql

Note: The WorkflowBuild.sql script only runs on SQL Server 2005 or later.

8. IWPBuild.sql

#### Complete duplicate/null clean up procedures on the CIC 2.4/CIC 3.0 database (SQL Server)

To address any issues that might exist in the CIC 3.0 source data before migrating to the new CIC 4.0 SU3 and above schema, Genesys created a new set of duplicate/null cleanup scripts. Running these scripts creates stored procedures capable of finding and fixing records that can cause the migration to fail.

The 3.0 SQL Server cleanup scripts are in the CIC Database Migration Assistant\Scripts\sqlserver\source\dupcheck directory, but you must run them from within SQL Server 2008 Management Studio.

Run the scripts in the following order, one after another. Don't run them at the same time.

- 1. Delete\_Dups\_AgentActivityLog.sql
- 2. Delete\_Dups\_AgentQueueActivationHist.sql
- 3. Delete\_Dups\_IAChangeLog.sql
- 4. Delete\_Dups\_ICDirChangeLog.sql
- 5. Delete\_Dups\_ILineGroupStats.sql
- 6. Delete\_Dups\_ILineStats.sql
- 7. Delete\_Dups\_IPA\_Flow\_Notes.sql

#### Note: The Delete\_Dups\_IPA\_Flow\_Notes.sql script only runs on SQL Server 2005 or later.

- 8. Delete Nulls IVRInterval.sql
- 9. Delete\_Dups\_LineConfig.sql
- 10. Delete\_Dups\_LineGroupConfig.sql
- 11. Delete\_Dups\_CallDetail.sql
- 12. Delete\_Dups\_LineGroupLines.sql
- 13. Delete\_Dups\_SurveyConfigLog.sql
- 14. Delete\_Dups\_SurveyDetail.sql
- 15. Delete\_Nulls\_SurveyObjectToSurveyPrompt.sql
- 16. Delete\_Dups\_SurveyObjectToSurveyPrompt.sql
- 17. Delete\_Nulls\_SurveyUserObjectSecurity.sql
- 18. Delete\_Nulls\_SurveyWork.sql
- 19. Delete\_Dups\_UserWorkGroups.sql

Each script runs some quick checks and if needed, creates a corresponding stored procedure to complete the rest of the examination and cleanup. The stored procedure has the same name as the script that created it.

The next step is to run each stored procedure against the database in the default *audit only* mode. This mode creates a result table and places records into it, but only copies the records there and doesn't change the data in the source table.

Run each of the stores procedures in the same order as the scripts that created them by running the following SQL for each stored procedure. This example is for the first script in the list, against a database named IC30DB.

```
Use [IC30DB];
EXEC [dbo].Delete_Dups_AgentActivityLog;
```

The script returns a result indicating whether it found any duplicate rows.

```
Executing sproc Delete_Dups_AgentActivityLog
Rows inserted into dbo.AgentActivityLog_d1305100353 = 7
```

For the previous example, the stored procedure found seven duplicate records and copied them to an audit table. The name of the table is in the format of the source table name, an underscore, a letter d or n indicating whether it was the duplicate or null version of the stored procedure, and then a number comprised of the two digit year, two digit month, two digit day, two digit hour, and two digit minute. This way, the audit can run as many times as you like and always produce a new table. You can optionally examine this data. If you have concerns regarding its removal, contact PureConnect Customer Care Services to work with them regarding those records.

#### Important!

Make a list of each stored procedure that finds records. Once all the stored procedures are run, use that list to complete the steps outlined in KB article:

https://my.inin.com/Products/Pages/KB-Details.aspx?EntryID=Q136562774400885

If you do not complete these steps, the migration of the data to the CIC 2015 R1 or later database fails.

#### Upgrade the CIC 4.0 database schema to the most recent CIC 2015 R1 or later database schema (SQL Server)

The 2015 R1 or later SQL Server scripts are in the CIC Database Migration Assistant\Scripts\sqlserver\target directory, but you must run them from within SQL Server 2008 Management Studio.

Run the scripts in the following order, one after another. Don't run them at the same time.

- 1. ICBuild.sql
- 2. TrackerBuild.sql
- 3. IRBuild.sql
- 4. OptimizerBuild.sql
- 5. CSSurveyBuild.sql
- 6. WorkflowBuild.sql

Note: The WorkflowBuild.sql script only runs on SQL Server 2005 or later.

- 7. DialerBuild.sql
- 8. IWPBuild.sql
- 9. SetUpMigratorUser.sql

## Upgrade the CIC 2.4/3.0 and CIC 2015 R1 or later database schema (Oracle)

CIC Database Migration Assistant relies on a specific database schema to be in place on both the source and destination databases. Before you run CIC Database Migration Assistant, you must:

- Upgrade the source CIC 2.4/3.0 database schema to the most recent (tested) CIC 3.0 database schema.
- Upgrade the destination CIC 4.0 database schema to the most recent (tested) CIC 2015 R1 or later 0 database schema.

To upgrade the schemas, run a set of scripts placed on the CIC Database Migration client computer when you installed CIC Database Migration Assistant. Running these scripts ensures that each database matches the schema required for the latest version of CIC Database Migration Assistant.

There are two options for running the database schema upgrade scripts:

- Follow prompts in CIC Database Migration Assistant to upgrade the database.
- Manually run the database schema upgrade scripts before running CIC Database Migration Assistant.

## Run the database schema upgrade scripts (Oracle) manually

Oracle customers use the following syntax from the command line:

```
sqlplus <dba user>/<dba pw>@<service name> @ScriptName.sql
<CIC DATA Tablespace> <CIC Index Tablespace>
```

#### Upgrade the CIC 2.4/3.0 database schema to the most recent CIC 3.0 database schema (Oracle)

The 3.0 Oracle Server scripts are in the CIC Database Migration Assistant\Scripts\oracle\source directory.

Run the scripts in the following order, one after another. **Don't** run them at the same time. Use the syntax and special directions provided for each script.

1. Create\_DB\_Objects.sp

Run this script from the SQL command-line using the following syntax:

sqlplus <User>/<Password>@<Hostname>:<Port>/<Service> @Create\_DB\_Objects.sp

2. Ora\_UpgradeDBSchema.sql

Note: You must have system permissions for the Ora\_UpgradeDBSchema.sql script.

Before you run this script, open the command prompt, change the directory to the location of the UpgradeDBSchema script, and run this script from the SQL command-line using the following syntax:

sqlplus <User>/<Password>@<Hostname>:<Port>/<Service> @Ora\_UpgradeDBSchema.sql <Data\_Tablespace>
<Index\_Tablespace> <Schema\_Owner> <Schema\_OwnerPass> <Hostname:Port/Service>

3. Ora\_TrackerUpgrade.sql

Note: You must have system permissions for the Ora\_TrackerUpgrade.sql script.

#### Run this script from the SQL command-line using the following syntax:

sqlplus <User>/<Password>@<Hostname>:<Port>/<Service> @Ora\_TrackerUpgrade.sql <Data\_Tablespace>
<Index\_Tablespace> <Schema\_Owner> <Schema\_OwnerPass> <Hostname:Port/Service>

4. Ora\_TrackerBuild.sql

#### Run this script from the SQL command-line using the following syntax:

sqlplus <User>/<Password>@<Hostname>:<Port>/<Service> @Ora\_TrackerBuild.sql <Data\_Tablespace>
<Index\_Tablespace>

5. Ora\_IRBuild.sql

### Run this script from the SQL command-line using the following syntax:

sqlplus <User>/<Password>@<Hostname>:<Port>/<Service> @Ora\_IRBuild.sql <Data\_Tablespace>
<Index\_Tablespace>

6. Ora\_OptimizerBuild.sql

#### Run this script from the SQL command-line using the following syntax:

sqlplus <User>/<Password>@<Hostname>:<Port>/<Service> @Ora\_OptimizerBuild.sql <Data\_Tablespace>
<Index\_Tablespace>

7. Ora\_CSSurveyBuild.sql

#### Run this script from the SQL command-line using the following syntax:

sqlplus <User>/<Password>@<Hostname>:<Port>/<Service> @Ora\_CSSurveyBuild.sql <Data\_Tablespace>
<Index\_Tablespace>

8. Ora\_WorkflowBuild.sql

#### Run this script from the SQL command-line using the following syntax:

sqlplus <User>/<Password>@<Hostname>:<Port>/<Service> @Ora\_WorkflowBuild.sql <Data\_Tablespace>
<Index\_Tablespace>

9. Ora\_IWPBuild.sql

#### Run this script from the SQL command-line using the following syntax:

sqlplus <User>/<Password>@<Hostname>:<Port>/<Service> @Ora\_IWPBuild.sql <Data\_Tablespace>
<Index\_Tablespace>

10. Ora\_ICFinalize.sql

Note: You must have system permissions for the Ora\_ICFinalize.sql script.

#### Run this script from the SQL command-line using the following syntax:

sqlplus <User>/<Password>@<Hostname>:<Port>/<Service> @Ora ICFinalize.sql <Schema Owner>

## Complete duplicate/null clean up procedures on the CIC 2.4/CIC 3.0 database (Oracle)

The 3.0 Oracle cleanup scripts are in the CIC Database Migration Assistant\Scripts\oracle\source\dupcheck directory.

Run these scripts from the SQL command-line in the following order, one after another. **Don't** run them at the same time. Use the syntax and special directions provided for each script.

- 1. Create\_Sprocs.sql
  - Run this script from the SQL command-line using the following syntax:
  - sqlplus <User>/<Password>@<Hostname>:<Port>/<Service> @Create\_Sprocs.sql
- 2. Execute\_Sprocs.sql

Run this script from the SQL command-line using the following syntax:

sqlplus <User>/<Password>@<Hostname>:<Port>/<Service> @Execute\_Sprocs.sql <data tablespace> <index
tablespace> <action code>

**Note:** Action code is 0 or 1. 0 does not remove data from the 3.0 tables; it creates tables that store the duplicates that would have been deleted if 1 was selected. 1 removes the duplicates and stores them in tables created during the sproc execution.

 $The {\tt Create\_Sprocs.sql} \ and {\tt Execute\_Sprocs.sql} \ scripts \ create \ and \ run \ the \ following \ stored \ procedures \ in \ the \ order \ presented \ to \ remove \ duplicates \ and \ nulls \ for \ 3.0 \ data:$ 

- Nulls\_IAChangeLog.sql
- Nulls\_IVRInteraval.sql
- Nulls\_SurveyObjectToSurveyPrompt.sql
- Nulls\_SurveyUserObjectSecurityPrompt.sql
- Nulls\_UserWorkGroups.sql
- Delete\_Dups\_AgentActivityLog.sql
- Delete\_Dups\_AgentQueueActivationHist.sal
- Delete\_Dups\_IAChangeLsql
- Delete\_Dups\_ICDirChangeLog.sql
- Delete\_Dups\_ILineGroupStats.sql
- Delete\_Dups\_ILineStats.sql
- Delete\_Dups\_IPA\_Flow\_Notes.sql
- Delete\_Dups\_IWrapUpStats.sql
- Delete\_Dups\_LineConfig.sql
- Delete\_Dups\_LineGroupLines.sql
- Delete\_Dups\_SurveyConfigLog.sql
- Delete\_Dups\_SurveyDetail.sql
- Delete\_Dups\_SurveyQuestionEnum.sql
- Delete\_Dups\_SurveyRule.sql
- Delete\_Dups\_SurveyObjectToSurveyPrompt.sql
- Delete\_Dups\_UserWorkGroups.sql

#### Upgrade the CIC 2015 R1 or later database schema to the most recent CIC 2015 R1 or later database schema (Oracle)

The 2015 R1 or later Oracle Server scripts are in the CIC Database Migration Assistant\Scripts\oracle\target directory.

Run the scripts in the following order, one after another. **Don't** run them at the same time. Use the syntax and special directions provided for each script.

1.	Create_User_Role.sql
	Run this script from the SQL command-line using the following syntax:
	<pre>sqlplus <user>/<password>@<hostname>:<port>/<service> @create_user_role.sql <schema_owner> <cic_user> <cic_readonly> <schema_owner_password> <cic_user password=""> <cic_readonly password=""></cic_readonly></cic_user></schema_owner_password></cic_readonly></cic_user></schema_owner></service></port></hostname></password></user></pre>
	Note: You must have system permissions for the Create_User_Role.sql script.
2.	Create_DB_Objects.sp
	Run this script from the SQL command-line using the following syntax:
	sqlplus < <i>User&gt;/<password>@<hostname>:<port>/<service></service></port></hostname></password></i> @Create_DB_Objects.sp
3.	Ora_ICBuild.sql
	Run this script from the SQL command-line using the following syntax:
	sqlplus <user>/<password>@<hostname>:<port>/<service> @Ora_ICBuild.sql <data_tablespace> <index_tablespace></index_tablespace></data_tablespace></service></port></hostname></password></user>
4.	Ora_TrackerBuild.sql
	Run this script from the SQL command-line using the following syntax:
	sqlplus <user>/<password>@<hostname>:<port>/<service> @Ora_TrackerBuild.sql <data_tablespace> <index_tablespace></index_tablespace></data_tablespace></service></port></hostname></password></user>
5.	Ora_IRBuild.sql
	Run this script from the SQL command-line using the following syntax:
	sqlplus <user>/<password>@<hostname>:<port>/<service> @Ora_IRBuild.sql <data_tablespace> <index_tablespace></index_tablespace></data_tablespace></service></port></hostname></password></user>
6.	Ora_OptimizerBuild.sql
	Run this script from the SQL command-line using the following syntax:
	sqlplus <user>/<password>@<hostname>:<port>/<service> @Ora_OptimizerBuild.sql <data_tablespace> <index_tablespace></index_tablespace></data_tablespace></service></port></hostname></password></user>
7.	Ora_CSSurveyBuild.sql
	Run this script from the SQL command-line using the following syntax:
	sqlplus <user>/<password>@<hostname>:<port>/<service> @Ora_CSSurveyBuild.sql <data_tablespace> <index_tablespace></index_tablespace></data_tablespace></service></port></hostname></password></user>
8.	Ora_WorkflowBuild.sql
	Run this script from the SQL command-line using the following syntax:
	sqlplus <user>/<password>@<hostname>:<port>/<service> @Ora_WorkflowBuild.sql <data_tablespace> <index_tablespace></index_tablespace></data_tablespace></service></port></hostname></password></user>
9.	Ora_DialerBuild.sql
	Run this script from the SQL command-line using the following syntax:
	sqlplus <user>/<password>@<hostname>:<port>/<service> @Ora_DialerBuild.sql <data_tablespace> <index_tablespace></index_tablespace></data_tablespace></service></port></hostname></password></user>
10.	Ora_IWPBuild.sql
	Run this script from the SQL command-line using the following syntax:
	sqlplus <user>/<password>@<hostname>:<port>/<service> @Ora_IWPBuild.sql <data_tablespace> <index_tablespace></index_tablespace></data_tablespace></service></port></hostname></password></user>
11.	Ora_ICFinalize.sql
	Run this script from the SQL command-line using the following syntax:
10	sqlplus <user>/<password>@<hostname>:<port>/<service> @Ora_ICFinalize.sql <schema_owner></schema_owner></service></port></hostname></password></user>
12.	SetUpMigratorUser.sql
	Note: You must have system permissions for the SetUpMigratorUser.sql script. This script includes the SYS.DBMS_CRYPTO package. Before you run SetUpMigratorUser.sql, ensure that <dba_user> is in the sysdba role. By default, only Oracle database users with the sysdba role have permissions to grant authority to the SYS.DBMS_CRYPTO package.</dba_user>
	Run this script from the SQL command-line using the following syntax:

sqlplus <User>/<Password>@<Hostname>:<Port>/<Service> as sysdba @SetUpMigratorUser.sql
<Target\_Schema> <MigrationUserName> <MigrationUserPassword>

# Prepare the CIC 3.0 and CIC 2015 R1 or later databases

# Prepare the CIC 3.0 and CIC 2015 R1 or later databases (SQL Server)

This section describes how to prepare the CIC 3.0 and CIC 2015 R1 or later databases for the migration.

## SQL Server pre-migration procedures for CIC

#### Modify the recovery mode for SQL Server

If you are migrating a SQL Server database, modify the recovery mode to increase the performance of the migration and reduce disk space requirements. SQL Server has three recovery modes: Full, Simple, and Bulk Logged. By default, the database uses Full recovery mode. Switching to Bulk Logged recovery mode significantly impacts the amount of time required, and the size needed for transaction logs.

#### To modify the recovery mode for SQL Server:

1. On a first migration run and when the CIC 4.0 database is empty (except for a few rows added to the Tracker tables at install time), delete the Tracker tables.

Note: You can delete the Tracker tables by selecting the appropriate check box on the Select Table Groups to Migrate page in CIC Database Migration Assistant or by running the Delete\_Tables\_PreMigration.sql script located in the \Scripts folder in the CIC Database Migration Assistant installation folder.

The CIC Database Assistant does not delete the INTX\_PARTICIPANT and INTXSEGMENT tables. It is important to note that if any data exists in these two tables, the system doesn't delete the data from any of the Tracker tables. This precaution exists to preserve live 4.0 production data.

If your 4.0 system is in production, but not live, and you choose to delete all Tracker data, you must complete these steps in the following order:

- a. Delete all data from INTX\_PARTICIPANT
- b. Delete all data from INTXSEGMENT
- c. Select the Delete Existing Tracker Data check box or run the Delete\_Tables\_PreMigration.sql script.
- 2. In Microsoft SQL Server 2008 Management Studio, switch to Bulk Logged recovery mode to take advantage of limited logging.

Note: Failure to switch to Bulk Logged recovery mode may result in exhausting transaction log disk space.

- 3. Complete a full backup of the CIC 2015 R1 or later database to have the features associated with the Bulk Logged recovery mode take effect.
- 4. Proceed with the migration as described in <u>Migrate the CIC 3.0 Database</u>.
- 5. After migrating the database, switch back to Full recovery mode, or the recovery mode of your choice, and complete a full backup of the CIC 2015 R1 or later database.

**Note:** Since changing the recovery mode of the database is something you may not want to do once the database is in production, it is highly recommended that you migrate all the historical data you intend to move before putting the database into production.

#### Run the SQL Server migration check script

Genesys recommends that you run a migration check script against the CIC 3.0 and CIC 2015 R1 or later databases to identify disabled foreign keys, indexes, and constraints. If the objects are already disabled, it means that the migration will not cause that state for those objects. Run the script again after the migration to see whether any objects remain disabled, and if so, enable them. SQL Server 2000

If the CIC 3.0 database is SQL Server 2000, run the <code>MigrationCheckSQL2000.sql</code> script against the CIC 3.0 database and run the <code>MigrationCheck.sql</code> script against the CIC 2015 R1 or later database. The scripts are in the <code>\Scripts\SqlServer</code> folder in the CIC Database Migration Assistant installation folder.

SQL Server 2005 or later

If the CIC 3.0 database is SQL Server 2005 or later, run the <code>MigrationCheck.sql</code> script against the CIC 3.0 and CIC 2015 R1 or later databases. The script is in the <code>\Scripts\SqlServer</code> folder in the CIC Database Migration Assistant installation folder.

#### (SQL Server 2000) Run script to create the sp\_tables\_info\_rowset\_64 stored procedure

If the CIC 3.0 database is a SQL 2000 Server 32-bit version and the CIC 2015 R1 or later database is a SQL Server 2008 64-bit version, add another stored procedure to the SQL 2000 Server.

- If you ran the CIC Database Script Execution Tool to prepare your CIC 3.0 database, it checks for the stored procedure and, if it has sufficient rights, creates it automatically. It notifies you if you need to create it manually.
- If you ran the CIC scripts manually, or the CIC Database Script Execution Tool was unable to create the stored procedure for you, you can run the SprocToAllowLinkToAccess2000Server.sql script manually on the CIC 3.0 database. The script creates the sp\_tables\_info\_rowset\_64 stored procedure. If you try to link the SQL Server 2008 64-bit version to the SQL 2000 Server 32-bit version without running the script, an error occurs. The error occurs because the SQL 2000 Server 32-bit version does not contain the sp tables info rowset 64 stored procedure, which the SQL Server 2008 64-bit version uses when running the distributed query.

For reference, here are the contents of the stored procedure:

```
CREATE PROCEDURE sp_tables_info_rowset_64
@table_name SYSNAME,
@table_schema SYSNAME = NULL,
@table_type SYSNAME = NULL
AS
DECLARE @Result INT SET @Result = 0
EXEC @Result = sp_tables_info_rowset @table_name, @table_schema, @table_type
GO
```

#### Change the remote query timeout

The target database queries the source database for records during the migration using a link created when running the CIC Database Migration Assistant. Queries on this link may take more time to complete than normal queries. To keep from experiencing timeout errors, Genesys recommends that you set the timeout to a very large value or disable it. The following commands modify the remote query timeout value when run from the target server.

```
sp_configure 'remote query timeout', 0;
GO
RECONFIGURE;
GO
```

After the data migration, you can change the value back to the default value of 600 (10 minutes).

#### Create a SQL Server migration user

When running CIC Database Migration Assistant, the database user you specify on the **Database Server Credentials** page must have a particular set of rights. Otherwise, the migration doesn't function properly. Genesys included a script to create a temporary user with the minimum required permissions. Genesys highly recommends that you create a user with permissions to run a migration so that you don't have to keep going back to the DBA when migrating multiple databases.

Genesys provides a script that:

- Creates a migration user
- Assigns the DB\_OWNER role to the user
- · Assigns permissions that allow the user to create and use linked servers
- Assigns the user to a specific CIC 4.0 database

Run the SetupMigratorUser.sql script from the command-line before starting the migration process. If you are also migrating Interaction Dialer, run this script after the migration creates the Dialer 4.0 database, but before running the CIC Database Migration Assistant for Dialer. Since the same migration user may migrate multiple databases, run the script before each migration and specify the CIC 4.0 databases. Following is an example for calling the script:

```
sqlcmd -S MyTargetServer -U sa -P SaPassword -i "C:\Program Files (x86)\Interactive Intelligence\CIC Database Migration Assistant\Scripts\sqlserver\SetupMigratorUser.sql" -o "c:\temp\test.log" -v MigratorUser=MigUser Password=MyPassWord Database=MyTargetDatabase
```

**Note:** Option  $-\circ$  (output file) is optional.

#### Prepare the CIC 3.0 and CIC 2015 R1 or later databases (Oracle)

This section describes how to prepare the CIC 3.0 and CIC 2015 R1 or later databases for the migration.

#### Oracle pre-migration procedures for CIC

#### Create data and index tablespaces

The physical data for ININ\_MIGRATION objects are in the Oracle ININ data and index tablespaces. Genesys recommends that you use different tablespaces than the ones used to store CIC 2015 R1 or later data to isolate and better retain database migration history data. Create the necessary tablespaces before running CIC Database Migration Assistant. For more information about tablespaces, see <u>Appendix</u> <u>C: Oracle Tablespaces</u>.

#### Set the authentication parameter for CIC

The SQLNET.AUTHENTICATION\_SERVICES parameter determines whether to allow access to the Oracle database server using a valid user name and password or NTS for Windows NT native authentication. Genesys recommends that you set the parameter to (NONE) to allow access to the Oracle database server using a valid user name and password. If the parameter is set to (NTS), the CIC Database Migration Assistant scripts may not run successfully. To set the parameter, access the SQLNET.ora file in your Oracle root directory and change the parameter so it reads as follows: SQLNET.AUTHENTICATION\_SERVICES= (NONE).

#### Run Oracle migration check script

Genesys recommends that you run a migration check script against the CIC 3.0 and CIC 2015 R1 or later databases to identify disabled foreign keys, indexes, and constraints. If the objects are disabled, it means that the migration doesn't cause that state for those objects. Run the script again after the migration to see whether any objects remain disabled, and if so, enable them.

If you are migrating an Oracle database, run the MigrationCheck.sql script against the CIC 3.0 and CIC 2015 R1 or later databases. The script is in the \Scripts\Oracle folder in the CIC Database Migration Assistant installation folder.

#### Create an Oracle migration user

When running CIC Database Migration Assistant, the database user you specify on the **Database Server Credentials** page must have a particular set of rights. Otherwise, the migration doesn't function properly.

#### Note: Oracle system/sa permissions do not work for migrations.

You can run the migration as a user that is not the CIC 2015 R1 or later database schema owner. The required permissions are sweeping and provide broad access across all schemas, and limit the validity or existence of a user that can do almost anything to any schema. Genesys requires that you run the migration as a user other than the CIC 2015 R1 or later database schema owner. The migration allows only one database user to migrate data into one particular CIC 4.0 database schema. The migration creates database objects, notably key translation tables, specific to the CIC 2015 R1 or later database schema that the user who runs the migration owns. If you are planning to make other database migrations into the same CIC 2015 R1 or later database schema, those database objects are valuable to retain.

Run the SetupMigratorUser.sql script after creating the CIC 2015 R1 or later database but before running CIC Database Migration Assistant. If you are also migrating Interaction Dialer, run this script after creating the Dialer 2015 R1 or later database, but before running the CIC Database Migration Assistant for Dialer. The script is in the \Scripts\Oracle folder in the CIC Database Migration Assistant installation folder. Run the script as a DBA user, logged on as SYSDBA.

The script requires the following parameters:

- 1. The name of the CIC 2015 R1 or later database schema. This schema is the same as the one the CIC 2015 R1 or later administrative database user created when you ra CIC Setup Assistant as part of the CIC 4.0 server installation.
- 2. The name of the database user running the migration. This name is the user name specified in the User Name box on the Database Server Credentials page.
- 3. The password for the user specified in the second parameter.

#### Example command

The following is an example of the command, assuming it is run in the same directory as the SetupMigratorUser.sql script:

sqlplus <dba user>/<dba pw>@<server>:<port>/<instance> as sysdba @SetupMigratorUser.sql <4.0
target> <migrator user> <migrator pw>

#### where:

- <dba user> is the database user name of the DBA user
- <dba pw>is the <dba user>password
- <server> is the name or IP address of the CIC 4.0 database server
- <port> is the TCP port that the CIC 4.0 database server listens on
- <instance> is the instance of the CIC 4.0 database
- <4.0 target> is the CIC 4.0 schema name
- <migrator user> is the database user running the migration
- <migrator pw>is the <migrator user> password

The script assigns the following system permissions to the database user specified as the *migrator* users:

ALTER ANY INDEX	ALTER ANY PROCEDURE	ALTER ANY SEQUENCE
ALTER ANY TABLE	CREATE ANY INDEX	CREATE ANY PROCEDURE
CREATE ANY SEQUENCE	CREATE ANY TABLE	CREATE ANY TYPE
CREATE ANY VIEW	CREATE DATABASE LINK	CREATE SEQUENCE
CREATE SYNONYM	CREATE TABLE	CREATE USER
CREATE VIEW	DELETE ANY TABLE	DROP ANY INDEX
DROP ANY PROCEDURE	DROP ANY SEQUENCE	DROP ANY TABLE
DROP ANY VIEW	EXECUTE ANY PROCEDURE	EXECUTE ANY TYPE
GRANT ANY PRIVILEGE	INSERT ANY TABLE	SELECT ANY DICTIONARY
SELECT ANY SEQUENCE	SELECT ANY TABLE	UPDATE ANY TABLE

The script assigns the following package execution permissions to the *migrator* user:

#### EXECUTE ON SYS.DBMS\_CRYPTO

The script assigns the following roles to the <migrator user>:

SELECT\_CATALOG\_ROLE

The script grants the specific object permissions to the *<migrator* user>:

#### SELECT ON <4.0 target>.ININ\_APP\_VERSION

The script assigns a number of permissive system permissions to *sigrator* users. An Oracle DBA can lock the *sigrator* users account after running a migration. The script checks to see whether the *sigrator* users account is locked and unlocks it automatically.

**Note:** For the Interaction Recorder and Survey migrations to function properly, if the ININ\_MIGRATION user doesn't exist under Oracle, the migration utility creates it. It also locks the ININ\_MIGRATION user account (makes it unavailable to log on under), and assigns it the following permissions:

- ALTER ANY INDEX
- ALTER ANY TABLE
- CREATE ANY INDEX
- CREATE ANY PROCEDURE
- CREATE SEQUENCE
- CREATE TABLE
- GRANT SELECT ANY TABLE
- ALTER USER ININ\_MIGRATION QUOTA UNLIMITED ON &xTbLTsp ' where &xTbLTsp is the value supplied in the UI
- ALTER USER ININ\_MIGRATION QUOTA UNLIMITED ON &xIdxTsp' where &xIdxTsp is the value supplied in the UI

# **Change commit frequency**

To change how often the inserts commit to the database during migration, in the restart tables, change the value in the **CommitFrequency** column. You can change these values while the migration is running. Be sure that the changes commit immediately after the update; otherwise, the migration process can hang while waiting for the system to release the lock.

The default value in the **CommitFrequency** column is 1,000, meaning that for every 1,000 records written to the table, the script issues a commit. You can raise or lower the value. If the CIC 4.0 database is an active production database with users accessing it, you can change to a lower value to increase user concurrency. The lower value prevents or reduces database timeouts due to locked table records. Setting the number to a lower value can result in a slower migration process. If users are not accessing the CIC 4.0 database actively, you can change to a higher value, which can result in a faster migration process.

**CommitFrequency** only applies to Interaction Recorder tables, Survey tables, and the following tables: CallDetail, IAgentQueueStats, IStatusGroup, and IWrkgrpQueueStats. The latter four tables have a corresponding restart table:

- ININ\_MIGRATION.CallDetail\_Restart
- ININ\_MIGRATION.IAgentQueueStats\_Restart
- ININ\_MIGRATION.IStatsGroup\_Restart
- ININ MIGRATION.IWkgrpQueueStats Restart

#### **Commit Frequency Command**

To update the commit frequency for these tables, issue the following SQL Server or Oracle command:

update inin\_migration.CallDetail\_restart set CommitFrequency = <new value>;

update inin\_migration.IAgentQueueStats\_restart set CommitFrequency = <new value>;

update inin migration.IStatsGroup restart set CommitFrequency = <new value>;

update inin migration.IWrkgrpQueueStats restart set CommitFrequency = <new value>;

COMMIT; (Oracle only)

#### Notes:

- After running the command for Oracle, issue a COMMIT statement.
- There is no need to specify a WHERE clause because these four tables contain only one row each.

## Interaction Optimizer considerations

The current release of the migration package supports an *all in one* bulk migration of Interaction Optimizer data. Genesys doesn't support mixing the data between CIC 3.0 and CIC 2015 R1 or later. When you run the CIC Database Migration Assistant as described in <u>CIC 3.0</u> <u>Database Migration</u>, and select **Optimizer Group**:

 ALL records (not restricted by date range or Site ID) import to the target database as long as there are no 2015 R1 or later Interaction Optimizer records in the target database.

Note: You can delete the 4.02015 R1 or later Optimizer records by running the Delete\_Optimizer\_Tables\_PreMigration.sql script in the \Scripts folder in the CIC Database Migration Assistant installation folder before migrating the CIC database.

• You must ensure that all Optimizer agents go live on the new 4.0/2015 R1 or later environment after you migrate Optimizer data contained in the database. This confirmation ensures that no mixing of data between CIC 3.0 and CIC 2015 R1 or later occurs.

Before running CIC Database Migration Assistant, ensure that you updated the CIC 3.0 database schema for Interaction Optimizer to the CIC 3.0 SU 14 database schema before migrating Interaction Optimizer data as described in <u>Upgrade the CIC 2.4/3.0 and CIC 2015 R1 or later</u> database schema (SQL Server) or <u>Upgrade the CIC 2.4/3.0 and CIC 2015 R1 or later</u> database schema (Oracle).

## Complete Interaction Tracker table group pre-migration procedures

If applicable, complete the following Interaction Tracker table group pre-migration procedures:

- Sync Tracker Configuration data on the source CIC server
- Migrate Tracker Configuration table group on the source CIC server

## Sync Tracker Configuration data on the source IC server

Before migrating Tracker Configuration data, sync the current state of DS on the CIC 2.4/3.0 server to the CIC 3.0 database. It's important that you sync the DS state so that the Tracker Configuration data that migrates to the CIC 4.02015 R1 or later database is as current as possible.

### To sync Tracker Configuration data:

- 1. In Interaction Administrator, click the Interaction Tracker container.
- 2. In the right panel, double-click Configuration.
- 3. In the Interaction Tracker Configuration dialog box, click the Import and Reassignment tab.
- 4. On the **Import and Reassignment** tab, in the **IC User Import** section, select the **Update existing entries** check box. Leave the **Home Site IDs** box blank and then click **Import Users Now**.

Interaction Tracker Configuration ? 🔀
Naming Server Database Multi-Language Support Data Purging
Import and Reassignment Image and URL Items Tracked External Utilities Timesheet Reporting
IC User Location Reassignment In the "The Home Site IDs" field below, list the IDs of the Home Sites that you would like to reassign to the location specified in "Location." Specify the Home Site IDs with a comma-separated list. Leave the field blank to specify all sites. Location: Interactive Intelligence, Inc Reassign Now Home Site IDs:
IC User Import In the "The Home Site IDs" field below, list the IDs of the Home Sites that you would like IC users imported from. Specify the Home Site IDs with a comma-separated list. Leave the field blank to specify all sites.
Update existing entries Import Users Now
Home Site IDs:
OK Cancel <u>Apply</u>

5. Click **OK**. The system places an entry in the event log when this process completes.

## Migrate Tracker Configuration table group on the source CIC server

Ensure that you migrate the Tracker Configuration table group before importing data using Interaction Migrator. If you import data before migrating these table groups, the result is duplicate entries with different ID keys, and historical reports that don't run correctly.

Migrate the Tracker Configuration table group for **any** CIC database that you ever intend to merge into this new CIC 2015 R1 or later database, including multi-site configurations with databases local to each site. For instructions on how to import, see <u>Import CIC 2.4/3.0 Configuration</u> <u>Data</u>.

**Note:** If you started the CIC 2015 R1 or later server before migrating the Tracker Configuration table group, delete the records in the Tracker Configuration table group in the CIC 2015 R1 or later database. Only do this step *the first time CIC Database Migration Assistant* attempts to migrate the Tracker Configuration table group. This process ensures that prior contact and organization details can migrate cleanly.

Ensure that the following tables are empty before migrating for the first time:

- dbo.Individual;
- dbo.Location;
- dbo.Organization;
- dbo.AddrType;
- dbo.AttributeType;
- dbo.ConnectionType;
- dbo.ConnSubType;
- dbo.IndivType;
- dbo.IntxType;
- dbo.OrgType;
- dbo.Title;

# Prepare the CIC 3.0 and CIC 2015 R1 or later servers (SQL Server and Oracle)

This section describes how to prepare the CIC 3.0 and CIC 2015 R1 or later servers for the migration.

## **Apply Interaction Recorder ESs**

- CIC 3.0: If you are on CIC 3.0 SU 14, apply ES SU14-ES\_CIC-102681. If you are on CIC 3.0 SU 15, apply ES SU-15-ES\_102681. These ESs contains several updates and are especially important for customers running against a SQL 2000 database and for all Interaction Recorder customers.
- CIC 2015 R1 or later: CIC 4.0 SU 3 and later systems required no ESs when Genesys updated this guide last.

# Stop purge processes on CIC 3.0 and CIC 2015 R1 or later servers

CIC servers often have an automated process set up to delete records older than a set number of days. If the purge process is in effect on either the CIC 3.0 or CIC 4.02015 R1 or later server, it can complicate verification of the migration process. For example, if Tracker Intx\_Participant rows are migrated from the CIC 3.0 server, and the CIC 3.0 server deletes data older than 400 days, but the CIC 2015 R1 or later server deletes data older than 30 days, it would appear that data did not get migrated to the CIC 4.0 server correctly. Similarly, if SQL COUNT (\*) statements are used to verify that the number of records moved, the count can vary from one day to the next because data is getting purged.

**Tip:** Genesys recommends that you stop the purge process on both the CIC 3.0 and CIC 2015 R1 or later servers during the migration process. If stopping the purge process is not feasible, the verification process is more complicated. At a minimum, ensure that the CIC 3.0 and CIC 2015 R1 or later servers have the same purge criteria in place for the duration of the migration process.

# Stop Reporting data purging

Complete these steps on both the CIC 3.0 and CIC 2015 R1 or later servers for each report log (base or custom).

#### To stop Reporting data purging:

- 1. In Interaction Administrator, click the System Configuration container and then click the Report Logs subcontainer.
- 2. In the right-side pane, double-click a report.
- 3. In the Report Log Configuration dialog box, click the Retention tab.
- 4. On the Retention tab, clear the Enable automatic purging for this report log check box and click Apply.

Report Log Configuration - 7	? ×
Basic Retention Mappings Custom Attributes History	
The retention time defines an expiration age for report log data. Records older than this age will b purged from the report log if automatic or manual purging is requested.	e
Purge records older than days	
Automatic	
Records can be set to be purged automatically according to the schedule set under Server Configuration.	
Enable automatic purging for this report log	
Manual	_
Records can be purged manually. Purge Now	
Confirm auto-save	oply

5. Repeat for all report logs.

### Stop Interaction Recorder data purging

If you use Interaction Recorder, stop data purging on the CIC 3.0 and CIC 2015 R1 or later servers.

#### To stop Recorder data purging on the CIC 3.0 server:

- 1. In Interaction Administrator, click the Interaction Recorder container.
- 2. In the right-side pane, double-click **Configuration**.
- 3. In the Interaction Recorder Configuration dialog box, click the Data Purging tab.
- 4. On the Data Purging tab, clear the Enable Purging check box and then click OK.

Recording Processing E-mail Data Purging Utilities	Recording Generation Key Generation	Custom Attributes for Querie Automated Archiving
Enable Purging		
Purging Options		
Purge:	Media and Data	<b>V</b>
Purge data at this time of day:	2:30:00 AM	2 17
Enable purging of non-archived d Purge non-archived data older th	ata an 184 days,	
Enable purging of archived data		
Purge archived data older than	184 days.	
Enable purging of screen recordin	gs	
Purge screen recordings older	than 184 days,	

To stop Interaction Recorder data purging on the CIC 2015 R1 or later server:

- 1. In Interaction Administrator, click the Interaction Recorder container and then click the Policy Editor subcontainer.
- 2. In the right-side pane, double-click Configuration.
- 3. In the Interaction Recorder Policy Editor dialog box, click the Retention tab.
- 4. On the **Retention** tab, clear the check box next to your purge policy and then, in the menu bar, click **Re-apply**.

Interaction Record	ler Policy Editor							
ile View Help					_			
Initiation Retention	Security							
New Policy	Change Policy -	Copy	🛃 Delete	4	л	🚳 Re-apply		Ontions
Balicy (applied in	the order chown)	-1 cop/	X			Stree apply	Actions	
Default Storage	Location						Actions	
Purge							~~	· · · · · · · · · · · · · · · · · · ·
I								
Policy description (clic	k on underlined valu	ue to edit):						
This policy applies	to all recordings	5						
retention period	set to Forever							
purge the record	ing and media							
								┙
							Γ	• 1
								Apply
								Modified
								,
Akaste   [No Station	ו]							

5. In the **Re-apply retention policies** dialog box, click **Re-apply to all recordings** and then click **OK**.



## Stop Interaction Tracker data purging on the CIC 3.0 and CIC 2015 R1 or later servers

Complete these steps on both the CIC 3.0 and CIC 2015 R1 or later servers.

#### To stop Tracker data purging:

- 1. In Interaction Administrator, click the Interaction Tracker container.
- 2. In the right-side pane, double-click Configuration.
- 3. In the Interaction Tracker Configuration dialog box, click the Data Purging tab.
- 4. On the Data Purging tab, clear the Enable Purging check box and then click OK.

nport and Reas	signment   Image and URL   Items Tr	acked   External Utilities	Timesheet Reporting
Naming	Server   Database	Multi-Language Support	Data Purging
	rging Options		
	Purge data at this time of day:	2:30:00 AM	
	Purge data older than	34 days,	
		OK Cance	Apply

# Rescue orphaned recordings in Interaction Recorder (SQL Server and Oracle)

If you use Interaction Recorder and you have orphaned recordings, note they don't migrate when you run CIC Database Migration Assistant. Orphaned recordings occur when something happens while processing a recording that renders the recording invalid. Orphaned recordings don't show up in CIC 2.4 or CIC 3.0 recording searches.

Genesys recommends that you rescue the orphaned recordings before running CIC Database Migration Assistant so that they migrate. For more information about rescuing recordings, see the *How to reprocess/rescue recordings guide* at: <a href="https://my.inin.com/support/selfhelp/Recorder/Pages/Best-Practices.aspx#how\_to\_guides">https://my.inin.com/support/selfhelp/Recorder/Pages/Best-Practices.aspx#how\_to\_guides</a>.

# CIC 3.0 Database Migration

This section provides instructions for migrating a CIC 3.0 database to a CIC 2015 R1 or later database using CIC Database Migration Assistant.

Note: The current version of CIC Database Migration Assistant contains updated tools and scripts for CIC 4.0 SU 3 and later for both SQL Server and Oracle.

# How CIC Database Migration Assistant migrates the database

CIC Database Migration Assistant does the following when updating the database on the database server:

- Checks to see whether the database schema matches this version of CIC Database Migration Assistant and displays a message when the schema is out of date.
- Generates custom script files from the tables, date ranges, and site IDs that you specify.
- Runs the custom script files if you choose that option. (Alternatively, though not recommended, you can run the scripts manually.)
- Tracks the specified configuration along with the migrated data to assist with migrating multiple sets of data.

## **Migration scenarios**

There are two scenarios for migrating from a CIC 3.0 database to a CIC 2015 R1 or later database: one-to-one or many-to-one. The process you use to migrate depends on your situation.

## **One-to-one migration**

The current release of the CIC 2.4/3.0 to CIC 2015 R1 or later migration package supports only one-to-one migrations. Genesys recommends this method for migrating from a CIC 3.0 to a CIC 2015 R1 or later database.

A one-to-one migration scenario migrates a single CIC 3.0 database to a single CIC 2015 R1 or later database. You could have multiple CIC 3.0 and CIC 4.02015 R1 or later databases; however, you are migrating on a one-to-one basis. So, for each CIC 3.0 database, you have a corresponding CIC 2015 R1 or later database you are migrating to.

## Many-to-one migration

A many-to-one migration scenario migrates two or more CIC 3.0 databases to a single CIC 2015 R1 or later database. Run CIC Database Migration Assistant and migrate the first CIC 3.0 database to the single CIC 2015 R1 or later database. Run it again to migrate each subsequent CIC 3.0 database to the same CIC 4.0 database.

#### Notes:

- It is important that the CIC 3.0 servers that used the separate databases have different site IDs. If the CIC 3.0 servers have the same site ID, data imported can conflict with data from another database. If you have this issue, contact PureConnect Customer Care for special instructions on how to proceed.
- If you have Interaction Feedback surveys in use on the CIC 3.0 database, run a one-to-one migration since surveys have no distinguishing column for site ID.
- If you use Interaction Optimizer, Genesys supports one-to-one migrations only.

# **Incremental migrations**

When you run CIC Database Migration Assistant, you can select a previous migration to use those settings and configurations. You can then modify those settings and configurations, if needed, before continuing with the migration. For example, to migrate in three-month increments, select and migrate the first three-month date range. Restart CIC Database Migration Assistant, select that same migration run, change the date range, and migrate the next three-month date range.

#### Notes:

- Genesys highly recommends that you migrate all the historical data you intend to move before putting the database into production.
- Running Interaction Optimizer on two different CIC servers using two different databases. Therefore, Genesys doesn't support running a many-to-one migration. For more information on bulk migration of Interaction Optimizer data, see <u>Optimizer table group</u> <u>considerations</u>.

# Optimizer table group considerations

The current release of the migration package supports an *all in one* bulk migration of Interaction Optimizer data. Genesys doesn't support mixing the data between CIC 3.0 and CIC 2015 R1 or later. When you run the CIC Database Migration Assistant as described in this section and select the **Optimizer Group**:

• ALL records (not restricted by date range or Site ID) import to the target database as long as there are no 2015 R1 or later Interaction Optimizer records in the target database.

**Note:** You can delete the 2015 R1 or later Optimizer records by running the Delete\_Optimizer\_Tables\_PreMigration.sql script in the \Scripts folder in the CIC Database Migration Assistant installation folder *before* migrating the CIC database.

- Ensure that all Optimizer agents go live on the new 4.0/2015 R1 or later environment after you migrate Optimizer data contained in the database. This confirmation ensures that no mixing of data between CIC 3.0 and CIC 2015 R1 or later occurs.
- If data exists in the Interaction Optimizer tables in the target database prior to migration, CIC Database Migration Assistant deletes the data before migration continues. The data from CIC 3.0 cannot merge into existing data. Once you select the Interaction Optimizer table group, CIC Database Migration Assistant displays a warning message to confirm the deletion of the data.

## **Tracker Configuration table group considerations**

If you run migrations over time, you could have updates to existing contact records on the CIC 3.0 server after migrating the contact records to CIC 4.0, but before migration of the corresponding users. Examples of possible updates are employee turnover, name changes, and address changes.

For each record in the Tracker Configuration table group, the system checks to see whether there were changes to the data in CIC 3.0 after your initial migration of the Tracker Configuration table group. If there were changes, CIC Database Migration Assistant displays a list of changed records and allows you to select the records to update in the CIC 2015 R1 or later database.

The TrackerUpdateScript script, created during script generation, updates the CIC 2015 R1 or later tables with the information from the CIC 3.0 tables for the records that you selected. The system runs the script when all the other generated scripts are run, unless you choose to run the scripts manually. In that case, you run the script manually in the order specified in the migration scripts batch file.

#### Important!

Once you migrate the Tracker Configuration data and begin changing data in CIC 4.0, *do not* go back and change data in CIC 3.0. If you change data in CIC 2015 R1 or later and then go back and change data in CIC 3.0, the CIC 3.0 record will have a higher *version* number. If you begin another migration, the system detects the difference in version numbers and includes the CIC 3.0 record in the list. You could inadvertently select a record for update and overwrite the CIC 2015 R1 or later record with data from the CIC 3.0 record that possibly isn't as current as the CIC 2015 R1 or later record.

# **Customized service levels**

In CIC 2015 R1 or later, Genesys added columns to tables in the CIC database to support changes in Interaction Reporter 2015 R1 or later queue reports. Currently, the CIC Database Migration Assistant populates the values in these columns with the default values for Service Levels found in CIC 2.4/3.0.

If you changed the default values and plan to use service level queue reports in 2015 R1 or later against your historical data, update the default data to match your current configuration. This setting **doesn't** migrate automatically; you must set it manually. Check the values on your system in Interaction Administrator and, if needed, contact PureConnect Customer Care for more information.

The following images show where to set these values in CIC 3.0 and CIC 2.4.

#### CIC 2.4 configuration and default value:

0	Interac	tion Administrator - [macer]	_ <b>—</b> X
Ele Edit View Context Window	v <u>H</u> elp	n	_ 8 ×
	•		
	-	Parameter Name /	Value 🔺
	_	MirrorExceptions	
Telephony Recours	ac .	NewVMPollingInterval	240
Telephony Resource		Play Queue Announcements	External
1 ines		QueuePeriodStatisticsGenerateDnisData	No
Lines		QueuePeriodStatisticsInterval	1800
Interfaces		QueuePeriodStatisticsServiceThresholds	10,20,30,40,50,60
		Reco Call Type	Both
T Line Groups		Recording Path	D:\I3\IC\Recordings
		ReportComponentsInstalled	REPORTS; PMQLOGGING
SMDI Ports	_	ReportFilePath	\\\${SERVERNAME}\IC_R
SMDI		Resource Path	D:\I3\IC\Resources
E Stations Space		Rx Document Path	D:\I3\IC\I3RxDocs
		Server Path	D:\I3\IC
- St Audio Sources		ServerReportLogDataDestination	PMQ:IC Report Logging
		SNMPTrapEnterprise	ININ
Server Parameters		Speech Profiles	Default Profile
Carbon Server Parameters	- 1	SwitchComPort	
7313	تے را	Switchover LIDD Initial Dino Delav	<u>د</u>
<u> </u>		•	<u> </u>

#### CIC 3.0 configuration and default value:

Server Configuration				? ×	
IP Configuration Handlers Monitor Ha	ndlers Accumula	ators 🖡 CPU Load	Detection Audio C	ompression	
Telephony Parameters Report Log P	urging Report	Configuration	Custom Attributes	History	
🗹 Generate media type reporting data (requires StatServer subsystem restart)					
Display report version in reports					
		Souries	Louels (cos)		
Queue/IVR reporting interval (min):	15		: Leveis (sec):		
	, _	20			
Line reporting interval (min):	15 -	30 40	<u>R</u> emove	1	
		150	• —	-	
		ОК	Cancel	Apply 1	

Also, CIC 2015 R1 or later changed from using a system-wide Service Level configuration to allowing you to specify different Service Levels for each Workgroup (Queue). If you customized your CIC 2.4 or CIC 3.0 system, change each workgroup manually that you want to continue to have custom Service Levels.

# About the Migration scripts

CIC Database Migration Assistant generates several scripts for migrating the databases. The scripts are in the <code>%APPDATA%\Interactive Intelligence\MigrationUtility\<date\_time>folder.</code>

You can allow CIC Database Migration Assistant to run the scripts automatically or close out of CIC Database Migration Assistant and run the scripts manually. Genesys recommends that you allow CIC Database Migration Assistant to run the scripts automatically because it is critical that the scripts run in a specific order.

# Migrate the CIC 3.0 database

This section describes how to migrate the CIC database using CIC Database Migration Assistant. Ensure that you are logged on using your CIC Administrator account.

#### To migrate the CIC 3.0 database:

- 1. Though not required, Genesys recommends that you stop CIC Service on the CIC server (if it is running) to:
  - Ensure that the migration doesn't add new data to the CIC 3.0 database schema while a migration is occurring.
  - Prevent access to a CIC 2015 R1 or later server during migration so that the migration uses the database server exclusively.
  - Note: Depending on how much historical reporting data that you have, it can take a long time to migrate your historical data.
- 2. Start CIC Database Migration Assistant on the CIC Database Migration Assistant client computer from the CIC Database Migration Assistant shortcut on the desktop.
- 3. On the Welcome page, click Next.

<b>0</b> 0°	<ul> <li>This wizard guides you through the process of migrating data in a CIC 3.0 database to a new CIC 2018 R1 database. The wizard:</li> <li>Generates custom script files from the tables, date ranges, and site ID's that you specify.</li> <li>Executes the custom script file if specified.</li> <li>Tracks the specified configuration along with the migrated data to assist with migrating multiple sets of data.</li> <li>To continue, dick Next.</li> </ul>
genesys.	

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

4. If this time isn't your first time running CIC Database Migration Assistant, the **Past Migration Utility Executions** page appears. To use settings from a previous migration, or restart a migration to run the scripts, click the migration to run and then click **Next**.

	Date Executed 09/21/17	Migration Status Incomplete	Start Date	End Date 09/21/17	Site ID	Source Database	Target Database	Link Name
00								

The Past Migration Utility Execution page contains settings, configuration, and status details of past migrations:

Column	Description
Date Executed	Date that a user opened the CIC Database Migration Assistant.
Migration Status	<ul> <li>Status of the script execution.</li> <li>Completed: CIC Database Migration Assistant generated and ran the scripts.</li> <li>Failed version check: You attempted to migrate from a CIC 3.0 database or to a CIC 4.0 database version that the version of CIC Database Migration Assistant running currently doesn't support.</li> <li>Incomplete: You canceled the migration process before the scripts generated.</li> <li>Ready for restart: CIC Database Migration Assistant generated the scripts but did not run them. When you are ready, you can restart the migration and have CIC Database Migration Assistant run the scripts.</li> <li>User completed: CIC Database Migration Assistant generated the scripts but did not run them. When you are ready, run the scripts manually.</li> </ul>
Start Date	Date the migration run started.
End Date	Date the migration run stopped.
Site ID	Site ID of the CIC 3.0 server.
Source Database	CIC 3.0 database to migrate from.
Target Database	CIC 4.0 database to migrate to.
Link Name	Name of the link between the CIC 3.0 and CIC 4.0 databases.

 On the Database Server Credentials page, in the Server Type list box, click the type of database server you are using (for example SQL Server or Oracle.)

9	CIC 2018 R1 Database Migration Assistant	_ <b>D</b> X
Database Server Crect Select the appropriate Ser 'Test Connection' to verif Database names.	dentials rver type and enter the credentials. Use fy credentials and supply the links and	
00°	Server Type: Select a database type 🔻	
S GENESYS		
		Cancel < Back Next >

The information that displays differs, depending on the type of server you selected.

6. Provide the requested information for the CIC 2015 R1 or later database server, depending on the server type you specified:

• For SQL Server:

abase names.	Server Type: Soil Server	
	Target Database	
	Server:	CELL DORT
	User Name:	
്	Password:	
8	Test Connection	
	Status Messages	

**Server:** Name of the CIC 4.0 database server. For SQL Server, include the instance and port number of the CIC 4.0 database. To see an example entry, click the information icon under the **Server** box.

User Name: User name for logging on to the CIC 4.0 database server.

Password: Password associated to the user name.

#### • For Oracle:

	oracle			
	Target Database		ININ data tablespace:	
	Serven		ININ index tablespace:	
	Fort #: Senice Name	1521	Target data tablespace:	
	User Name:		Target index tablespace:	
	Password:			
og l	Te	st Connection		
0	Status Messages			
	09:31:37: Selected Ora	cle for database type		

**Server:** Name of the CIC 4.0 database server. For SQL Server, include the instance and port number of the CIC 4.0 database. To see an example entry, click the information icon under the **Server** box.

Port #: (Oracle only) Port number of the CIC 4.0 database server.

Service Name: (Oracle only) Name of the service this instance of the CIC 4.0 database connects to.

User Name: User name for logging on to the CIC 4.0 database server.

Password: Password associated to the user name.

ININ data tablespace: (Oracle only) Tablespace where the data resides for the ININ MIGRATION schema.

ININ index tablespace: (Oracle only) Tablespace where indexes reside for the ININ MIGRATION schema.

Target data tablespace: (Oracle only) Tablespace where CIC 4.0 tables and stored procedures reside.

Target index tablespace: (Oracle only) Tablespace where CIC 4.0 indexes are stored.

7. Click Test Connection. The system tests the following:

- Connection to the CIC 2015 R1 or later database server. If the connection isn't successful, verify the information that you provided is correct.
- (SQL Server) **CREATE LINK** permission. If you don't have this permission, the system displays a message to that effect and **Create** Link is unavailable.
- (Oracle) Permission for running a migration. If you don't have this permission, the system displays a message to that effect. Check
  your permissions or provide credentials for a user who has the permission.
- (Oracle) Permission to migrate to the selected CIC 2015 R1 or later database. If you don't have this permission, the system displays a message to that effect. Select a different CIC 2015 R1 or later database or check your permissions.
- 8. A link connects one CIC 3.0 database to one CIC 4.0 database. If a link doesn't exist between the CIC 3.0 and CIC 2015 R1 or later databases, do the following:
  - a. On the Database Server Credentials page, in the Links list box, click Create Link....
  - b. In the **Create Link** dialog box, provide the information for the new link and, in the **Link Name** box, type the name to assign to the link. The link name cannot start with a non-alphabetic character.

🧐 Create Link	
Source Database	
Server:	
User Name:	
Password:	
Link Name:	ININ_MIGRATION_LINK
	Create Link)

Note: The information that displays in the Create Link dialog box differs depending on the type of server you selected (SQL Server or Oracle).

- c. Click Create Link .....
- 9. On the Database Server Credentials page, complete the information and then click Next.

Links:	ININ_LOCAL_LINK	•	
Source DB name:	Viking	•	
Target DB name:	UI	•	
			Cancel < Back Ne

Links: Name of the link between the CIC 3.0 and CIC 2015 R1 or later databases.

Source DB name: Name of the CIC 3.0 database to migrate.

Target DB name: Name of the CIC 2015 R1 or later database.

**Note:** If you attempted to migrate from a CIC 3.0 database version, or to a CIC 2015 R1 or later database version that the currently running version of CIC Database Migration Assistant doesn't support, an error message appears. Ensure that the database version is compatible with this version of CIC Database Migration Assistant, as described in <u>Upgrade the CIC 2.4/3.0 and CIC 2015 R1 or later database schema (SQL Server)</u> or <u>Upgrade the CIC 2.4/3.0 and CIC 2015 R1 or later database schema (Oracle)</u> in <u>Prepare for CIC Database Migration</u>.

10. The CIC Database Migration Assistant checks the source database for compatibility. If the source database is compatible, the system displays a message to that effect. Continue to the next step for selecting table groups to migrate.

If the source database is not compatible, the CIC Database Migration Assistant requires you to upgrade the source database, repair source data issues, and upgrade the target database. Messages appear under **Status Messages** on the **Database Server Credentials** page to indicate your progress through the following steps:

a. In the Verify Source Database dialog box, type the credentials for the source database and then click Upgrade Source Database.

🚪 Verify Source Database	×
The SOURCE database is missing one or more version of the IC Database Migration Assistate necessary to upgrade the database using the	e schema objects that are required by this it. In order to proceed with this migration, it is scripts installed with this version.
Server:	dpe-sql2012
IC Admin User Id:	sa
IC Admin Password:	••
Upgrade Sou	rce Database

b. In the Check Source Database dialog box, type the credentials for the source database and then click Repair Source Data Issues.

🔕 Check Source Database	×					
The IC Database Migration Assistant needs to procedures in the source database. These pro source data issues that will prevent the migration	install and run some diagnostic stored ocedures will back up and clean out known ion from suceeding.					
Server:	dpe-sql2012					
IC Admin User Id:	sa					
IC Admin Password:	••					
Repair Source Data Issues						

c. In the Verify Target Database dialog box, type the credentials for the target database and then click Upgrade Target Database.

🚪 Verify Target Database	×				
The TARGET database is missing one or more schema objects that are required by this version of the IC Database Migration Assistatnt. In order to proceed with this migration, it is necessary to upgrade the database using the scripts installed with this version.					
IC Admin User Id:	sa				
IC Admin Password:	••				
Upgrade Target Database					

11. On the Select Table Groups to Migrate page, select the table groups to migrate and then click Next.



On a first migration run, the **Delete Existing Tracker Data** check box appears. To delete the Tracker tables, select **Delete Existing Tracker Data**. The migration assistant deletes the following Tracker tables in the order shown:

- INDIVCONNECTION
- INDIVIDUAL
- LOCATION
- ORGANIZATION
- ADDRTYPE
- ATTRIBUTETYPE
- CONNECTIONTYPE
- CONNSUBTYPE
- INDIVTYPE
- INTXTYPE
- ORGTYPE
- TITLE

#### Notes:

- At a minimum, you must *migrate the Tracker Configuration table group before running Interaction Migrator*. If you import data before migrating this table group, the result is duplicate entries with different ID keys, and historical reports that don't run correctly.
- The CIC Database Assistant does not delete the INTX\_PARTICIPANT and INTXSEGMENT tables. It is important to note that if any data exists in these two tables, the system doesn't delete the data from any of the Tracker tables. This precaution exists to preserve live 2015 R1 or later production data.
  - If your 4.0 system is in production, but not live, and you choose to delete all Tracker data, complete the following steps in order:
  - 1. Delete all data from INTX\_PARTICIPANT
  - 2. Delete all data from INTXSEGMENT
  - 3. Select the Delete Existing Tracker Data check box
- If you click a table group to select it, information about that table group appears to the right.
- When you select a table group with interdependencies, the system selects the interdependent table groups and makes them unavailable so that you cannot clear them.
- For SQL Server, if a CIC 2015 R1 or later table is empty, the migration process for that table goes much faster for several reasons. First, CIC Database Migration Assistant does not have to ensure that the rows in the 3.0 table are not in the 2015 R1 or later table. Second, the non-clustered indexes are disabled, which allows for a much faster insert. Third, if using bulk logging or simple recovery mode, there are fewer writes to the log.
- 12. If you updated the Tracker Configuration data in CIC 3.0 after your initial migration of the Tracker Configuration group, the Tracker Difference Report page appears. In the Table Name box, click a table, select the records to migrate the CIC 3.0 changes to CIC 2015 R1 or later, and then click Next.

d	CIC 2018 R1 Database Migration Assistant					
racker Difference Rep Below are all of the differen 4.0. Please review the infor would like to update with	nces in Tracker mation and sele the 3.0 changes	Data bet ect whic	tween 3.0 and h records you			
	Table Nam	ne: Loc/	Attribute 👻			
	Selected	Name	Changed Columns			
		rereg	LocID, FldVal, Version			
		999	LocID, FldVal, Version			
00			LocID, Version			
		rereg	LocID, FldVal, Version			
		999	LocID, FldVal, Version			
			LocID, Version			
		rereg	LocID, FldVal, Version			
ਫੈ GENESYS		999	LocID, FldVal, Version			
	<b>1</b>		LocID, Version			
		rereg	LocID, hss-&nm693\xh44103, FldVal, Version			
		999	LocID, hss-&nm693\xh44103, FldVal, Version	Ŧ		
					Cancel < Back Next >	

#### Notes:

- New Tracker Configuration data is migrated on subsequent migrations even if the items are not selected on the **Tracker Difference Report** page. (Items only appear if existing information was changed.) Existing Tracker Configuration data that was changed is migrated on subsequent migrations only if the item is selected on the **Tracker Difference Report** page.
- In the Name column, the system attempts to display the following, depending on what data is available: LastName, FirstName
   FirstName or LastName
   ICUserID
   IndivID
- 13. On the **Data Filter Settings** page, to limit the migration by date range, site ID, or both, provide the migration parameters and then click **Next**.

<b>d</b>		CIC 2018 R1 Datab	base Migration Assistant	×
Data Filter Settings If you would like to limit ID, please enter that in	t the migration by a d formation here.	ate range or Site		
	Start Date: End Date: Site ID:	1/1/1900 8/5/2015	15	
	Source Data Time	Zone: (UTC-05:00) Eastern Tim	e (US & Canada) 💌	
ő				
genesys.				
				<u>Cancel</u> <u>&lt; Back</u> <u>Next</u> >

Start Date: Start date to limit the database records to migrate.

End Date: End data to limit the database records to migrate.

Note: All records inserted after 00:00 UTC on the start date and before 24:00 UTC on the end date migrate. You cannot include the current date in the date range.

Site ID: Site ID of the CIC 3.0 server to migrate. If you have multiple CIC 3.0 databases you are migrating to a single CIC 4.0 database, you can use this parameter to migrate one CIC 3.0 database at a time.

Note: If left blank, all records migrate.

Source Data Time Zone: Time zone for the source data. The migration process uses this time zone to populate UTC fields that exist in several table groups in CIC 4.0, but not in CIC 2.4/3.0.

**Note:** Because the CIC server uses Windows time zone information to create look-up tables, users in the following time zones need to run the appropriate Windows update found on the Windows support site at <a href="http://support.microsoft.com/kb/2657025">http://support.microsoft.com/kb/2657025</a>:

- Samoa Standard Time
- Russian Standard Time
- Ekaterinburg Standard Time
- N. Central Asia Standard Time
- North Asia Standard Time
- North Asia East Standard Time
- Yakutsk Standard Time
- Vladivostok Standard Time
- Magadan Standard Time
- Kaliningrad Standard Time

#### Notes:

- If you specify parameters when migrating the Tracker Configuration table group, the system ignores the parameters and migrates all Tracker Configuration tables in the group for all site IDs.
- The script generation process can take several minutes depending on the number of scripts it creates.
- CIC Database Migration Assistant deletes data in the following tables from the 2015 R1 or later database each time you run CIC Database Migration Assistant, unless you are limiting the migration by site ID:
  - LineConfig
  - LineGroupConfig
  - LineGroupLines
  - UserWorkGroups
  - AccountCodeMirror

These tables only include current activity as reflected in Interaction Administrator; they don't include historical data. So, CIC Database Migration Assistant deletes any CIC 3.0 data migrated to CIC 2015 R1 or later previously before migrating CIC 3.0 data again. If you limit the migration by site ID and the CIC 3.0 and CIC 2015 R1 or later systems use different site IDs, CIC Database Migration Assistant doesn't delete the CIC 2015 R1 or later data. If you don't specify a site ID, CIC Database Migration Assistant deletes all CIC 3.0 records from the CIC 2015 R1 or later database. The process identifies the distinct site IDs in the CIC 3.0 database for each table and uses those values to delete the CIC 3.0 records from the CIC 4.0 database tables.

- CIC Database Migration Assistant runs a script after the migration to clean up duplicate user values. Duplicate user values typically indicate that the 4.0 database had data existing in the tables before the migration took place.
- 9. On the Preview Scripts page, choose one of the following methods for previewing the scripts before you run them:
| ript generation comp<br>w a generated scrip<br>w the root folder fo | olete. You may select scripts below t<br>t. Or press "Open Script Location" to<br>r the generated scripts.  | 0   |  |
|---|---|---|--|
|   | Ge  | nerated Scripts   |  |
| 00°   | □ Tracker Config<br><u>MiddaType</u><br>AthibuteType<br>ConnectionType<br>ConsubType<br>IndvType<br>IndvType<br>Title<br>OrgType<br>OrgType<br>OrgType<br>OrgType<br>OrgType<br>OrgType<br>OrgAthibute<br>LocAthrbute<br>OrgAthrbute<br>OrgAthrbute<br>OrgAthrbute<br>OrgAthrbute<br>OrgAthrbute<br>OrgAthrbute<br>OrgAthrbute<br>OrgAthrbute<br>OrgAthrbute<br>OrgAthrbute<br>OrgAthrbute<br>OrgAthrbute<br>OrgAthrbute<br>OrgAthrbute<br>OrgAthrbute<br>OrgAthrbute<br>OrgAthrbute<br>OrgAthrbute<br>OrgAthrbute<br>OrgAthrbute<br>OrgAthrbute<br>OrgAthrbute<br>OrgAthrbute<br>OrgAthrbute<br>OrgAthrbute<br>OrgAthrbute<br>OrgAthrbute<br>OrgAthrbute<br>OrgAthrbute<br>OrgAthrbute<br>OrgAthrbute<br>OrgAthrbute<br>OrgAthrbute<br>OrgAthrbute<br>OrgAthrbute<br>OrgAthrbute<br>OrgAthrbute<br>OrgAthrbute<br>OrgAthrbute<br>OrgAthrbute<br>OrgAthrbute<br>OrgAthrbute<br>OrgAthrbute<br>OrgAthrbute<br>OrgAthrbute<br>OrgAthrbute<br>OrgAthrbute<br>OrgAthrbute<br>OrgAthrbute<br>OrgAthrbute<br>OrgAthrbute<br>OrgAthrbute<br>OrgAthrbute<br>OrgAthrbute<br>OrgAthrbute<br>OrgAthrbute<br>OrgAthrbute<br>OrgAthrbute<br>OrgAthrbute<br>OrgAthrbute<br>OrgAthrbute<br>OrgAthrbute<br>OrgAthrbute<br>OrgAthrbute<br>OrgAthrbute<br>OrgAthrbute<br>OrgAthrbute<br>OrgAthrbute<br>OrgAthrbute<br>OrgAthrbute<br>OrgAthrbute<br>OrgAthrbute<br>OrgAthrbute<br>OrgAthrbute<br>OrgAthrbute<br>OrgAthrbute<br>OrgAthrbute<br>OrgAthrbute<br>OrgAthrbute<br>OrgAthrbute<br>OrgAthrbute<br>OrgAthrbute<br>OrgAthrbute<br>OrgAthrbute<br>OrgAthrbute<br>OrgAthrbute<br>OrgAthrbute<br>OrgAthrbute<br>OrgAthrbute<br>OrgAthrbute<br>OrgAthrbute<br>OrgAthrbute<br>OrgAthrbute<br>OrgAthrbute<br>OrgAthrbute<br>OrgAthrbute<br>OrgAthrbute<br>OrgAthrbute<br>OrgAthrbute<br>OrgAthrbute<br>OrgAthrbute<br>OrgAthrbute<br>OrgAthrbute<br>OrgAthrbute<br>OrgAthrbute<br>OrgAthr | Scripts:     DisableIndexes     DisableFiKs     DisableConstraints     EnableIndexes     EnableFiKs     EnableFiKs     InsertScript |  |
| genesys.  | Open Script Location<br>Please choose how you would like<br>© Execute now<br>© Execute later<br>© Execute manually  | to continue:  |  |

a. In the left column, click a table group to expand it and then click a table to display its scripts in the right column.b. In the right column, double-click a script to view its contents. The script displays in your chosen text editor.

🧏 Microsoft SQL Ser	ver Management Studio			
<u>F</u> ile <u>E</u> dit <u>V</u> iew	<u>Query D</u> ebug <u>T</u> ools	<u>W</u> indow <u>C</u>	ommunity <u>H</u> elp	
🕴 ૣ <u>N</u> ew Query 🛛 🗋	)   🕞   💕 🛃 🎒   🌉	÷		
! 💵 🔢	- 📍 E	👱 xecute 🕨 🔳	- 🞲 🖃 📃	P 🖷 🖉 🖉 🙄
AddrType.sql - no	t connected	• ×	Properties	<b>-</b> ₽×
/* UTC fil DECLARE 0S	e generation time TART DATETIME2 = S	is 2012	Current query wir	ndow options 🔹
UPDATE SET WHERE	ININ_MIGRATION.Hi Exec_Disable_CK_S ,Exec_Disable_CF JOB_NBR	story_S = start_UT C_End_UT	Status	<b>tion parameters</b> Disconnected.
AND	Schema_Name	-	<b>Status</b> Status	
Ready	Ln 1	Col 1	Ch 1	INS <sub>d</sub>

c. Click  ${\bf X}$  in the upper right corner of the window to close it. -OR-

a. On the Preview Scripts page, click Open Script Location.

b. Drill down to the script you want to view and click a single script to select it. The script appears in the right pane.

Share with  New folder Name Name AddrType.sql AddrType.sql ConnectionType.sql ConnSubType.sql ININ_M IndivType.sql Init/Type.sql Corparization sol	C file g RE @STARI UPDATE 1 SET E WHERE 1 MIGRATION AND 1	eneration time is T DATETIME2 = SYS ININ_MIGRATION.Hi Exec_Disable_CK_S ,Exec_Disabl JOB_NBR N.History_Jobs Schema_Name	2012-02-23 UTCDATETIME( story_Stats tart_UTC = @ e_CK_End_UTC	15:26:04.6 ); START = SYSUT = (SELECT	346720. */ CDATETIME() MAX(JOB_NBR)	## <b>•</b>		0
Name /* UTC DECLAS AddrType.sql AttributeType.sql ConnectionType.sql ConnSubType.sql IntivType.sql IntivType.sql Control of the test of test of the test of tes	C file gr RE @STAR SET E WHERE : MIGRATION AND :	eneration time is T DATETIME2 = SYS ININ_MIGRATION.Hi Exec_Disable_CK_S _Exec_Disabl JOB_NBR N.History_Jobs Schema_Name	2012-02-23 UTCDATETIME( story_Stats tart_UTC = @ e_CK_End_UTC	15:26:04.6 ); START = SYSUT = (SELECT	346720. */ CDATETIME() MAX(JOB_NBR)			
Title.sql	;	TABLE_NAME		dboʻ = ʻAddrTyp	e°		)	FROM

c. To open the script, double-click the script in the left column. The script displays in your chosen text editor.

🗏 Microsoft SQL Ser	ver Management Studio			- • •
<u>F</u> ile <u>E</u> dit <u>V</u> iew	<u>Q</u> uery <u>D</u> ebug <u>T</u> ools	<u>W</u> indow <u>C</u>	ommunity <u>H</u> elp	
🗄 <u>ိ</u> New Query 🛛 👔	🗈   💕 🖬 🕘   🌉 ]	Ŧ		
: 5월 한값	- 🕴 E <u>x</u>	ecute 🕨 💻	- 🖸 🖬 🗌	17 🖷 🖉 🖉 📜
Addr Type.sql - no	t connected	<b>-</b> ×	Properties	<b>→</b> ╄ ×
/* UTC file	e generation time :	is 2012	Current guery w	indow options 🔹 🔻
DECLARE @S'	TART DATETIME2 = ST	YSUTCDA 🔶	<u>₽</u> ↓   □	
UPDATE	ININ_MIGRATION. His	story_S ≡	Current conne	ection parameters
SET	Exec_Disable_CK_St	tart_UT	Status	Disconnected.
	,Exec_Disable_CK	_End_UT		
WHERE	JOB_NBR			
AND	Schema_Name	-	Status	
<ul> <li>Ⅲ</li> </ul>		•	Status	
🔩 Disconnected.				
Ready	Ln 1	Col 1	Ch 1	INS

d. Click **X** in the upper right corner of the dialog box to close it.

10. On the **Preview Scripts** page, select an option for running the scripts.

	Generated scipits.	nerated Scripts	
00°	□ Tracker Config Addin Sync Attribute Type Connection Type ConnSubType IndxType IntxType Tible OrgaType Organization Location LocAddress LocAddress LocAddress LocAddress LocAddress OrgAddress Or	Scripts:     DisableIndexes     DisableFiKs     DisableConstraints     EnableIndexes     EnableFiKs     EnableConstraints     InsertScript	
S GENESYS	Open Script Location Please choose how you would like © Execute now © Execute later © Execute manually	to continue:	

Note: To change parameters before running the scripts, click Back. Your changes reflect when the scripts regenerate.

**Execute now:** If selected, the system runs the scripts after the **CIC Database Migration Assistant Completed** page appears. **Execute later:** If selected, the system postpones running the scripts. You can open CIC Database Migration Assistant and select this

migration when you are ready for the system to run the scripts. You can open CiC Database Migration Assistant and select this

**Execute manually:** If selected, you want to run the scripts manually. If you choose this option, it is critical that you run the scripts in a specific order. Genesys does not provide support for running the scripts manually.

- 11. Click Next.
- 12. On the **CIC Database Migration Assistant Completed** page, one of three things occurs, depending on whether you chose to run the scripts now, later, or manually.

Notes:

- The amount of time it takes to run the scripts depends on the amount of data migrating. Migration can take anywhere from minutes to hours.
- You can view the scripts while they running.

Execute now: If you chose Execute now, the following page appears:



The system begins running the scripts. When completed, click **Finish.** If you are migrating in stages, restart CIC Database Migration Assistant to change settings and generate the next set of scripts.

Execute later: If you chose Execute later, the following page appears:

1	CIC 2018 R1 Database Migration Assistant
C Database Migration	Assistant Completed
	The scripts have been generated and can be reviewed. Please restart this assistant to execute them.
•	
Ŏ	
Ō	
GENESVS	
0 OLIVEOTO	
	Cancel Finit

The system saves the scripts so that you can run them at a later time. Click **Finish.** If you are migrating in stages, restart CIC Database Migration Assistant to change settings and generate the next set of scripts.

When you are ready to run the scripts, do the following:

- a. Open CIC Database Migration Assistant.
- b. On the **Past Migration Utility Executions** page, find the entry with the date and time that matches when you generated the scripts, and with a **Migration Status** of "Ready for restart." Select this entry and then click **Next**. The **Script Generation** page appears.
- c. Click **Execute now** and then click **Next**. A message displays indicating that the scripts are running. After the scripts run, click **Finish**.

Note: After you click **Finish**, CIC Database Migration Assistant zips and encrypts the script files and the configuration files for migration before closing.

Execute manually: If you chose Execute manually, the following page appears:

ଗ	CIC 2018 R1 Database Migration Assistant	_ <b>_</b> ×
IC Database Migratio	on Assistant Completed	
	IC Database Migration Assistant Completed Migration scripts batch file has been exported.	
00		
ର୍ଷ GENESYS'		
		Cancel Finish

The system saves the scripts and creates a batch file so you can run the scripts manually. The batch file is called ExecuteMigrationScripts.bat and is located in the root directory where the scripts are (for example, %APPDATA%\Interactive Intelligence\MigrationUtility\[date time]).

#### Warning!

If you double-click the batch file or right-click the batch file and then click **Open**, the system runs the scripts.

You can use the batch file in two ways:

• For manual script execution. You can use it to view the order in which to run the scripts and then run the scripts manually using that exact order. It's critical that you run the scripts in the order specified.

To view the batch file, right-click  ${\tt ExecuteMigrationScripts.bat}$  and then click <code>Edit</code>.

• For automated script execution. To have the system run the scripts, double-click ExecuteMigrationScripts.bat.

```
Note: If a catastrophic failure occurs (for example, power loss) while the migration scripts are running, run the MigrationCleanup.bat batch file in the root directory where the scripts are (for example, <code>%APPDATA%\Interactive Intelligence\MigrationUtility\[date time]</code>).
```

13. If you stopped CIC Service, restart it.

# Troubleshooting the CIC Database Migration Assistant

# Clean up scripts

If an error occurred during the migration, the CIC Database Migration Assistant attempts to run **cleanup scripts** to resolve the issue. The following message displays:



- Do the following:
  - a. Click **OK** to run the cleanup scripts.
  - b. When the cleanup scripts complete without error, restart CIC Database Migration Assistant.

**Note:** If the **cleanup scripts fail to run**, or if the system asks you to run the cleanup scripts again after the restart, an issue exists within the database that you must correct manually. Contact PureConnect Customer Care and provide the CIC Database Migration Assistant logs from all available executions.

## Troubleshooting database table groups and table migration

When running the CIC Database Migration Assistant, it's possible that the CIC 2015 R1 or later database schema cannot accommodate some source data, causing the migration to fail.

If you encounter a migration failure, you find the offending source data and modify or purge it. For help with troubleshooting, see KB article: <a href="https://my.inin.com/Support/Pages/KB-Details.aspx?EntryID=Q134616021600411">https://my.inin.com/Support/Pages/KB-Details.aspx?EntryID=Q134616021600411</a>. The article lists the table groups and tables by which the CIC Database Migration Assistant migrates data, and displays these tables and table groups in the same patterns that CIC Database Migration Assistant follows during a migration. Locate the table group and the failed table, and then expand the relevant section to find problems, causes, and solutions to the failure.

For further assistance, Contact PureConnect Customer Care.

# Complete CIC 2015 R1 or later database post-migration procedures

After migrating the CIC 3.0 database to CIC 2015 R1 or later, complete the follow post-migration procedures:

- Run post-migration check script
- Restart purge processes on the CIC 2015 R1 or later server
- Reapply Interaction Recorder Security Policies

# Run post-migration check script for CIC

Genesys recommends that you run the MigrationCheck.sql script against the CIC 2015 R1 or later database after migration to check for foreign keys, indexes, and constraints that remain disabled after the migration. If the migration disabled any objects, re-enable them before proceeding and before using the database with a production CIC system. If you cannot re-enable an object, such as a foreign key, because of bad data, do one of the following to fix the data problem:

- For SQL Server, run the script located in the SqlServer folder in the CIC Database Migration Assistant installation folder.
- For Oracle, run the script located in the Oracle folder in the CIC Database Migration Assistant installation folder.

## Restart purge processes on CIC 2015 R1 or later server

If you stopped the purge process on the CIC 2015 R1 or later server before migrating the database, you can restart it after you finish migrating the database.

# **Restart Reporting data purging**

Complete these steps on the CIC 2015 R1 or later server for each report log (base or custom).

#### To restart Reporting data purging:

- 1. In Interaction Administrator, click the System Configuration container and then click the Report Logs subcontainer.
- 2. In the right-side pane, double-click a report.
- 3. In the Report Log Configuration dialog box, click the Retention tab.
- 4. On the Retention tab, select the Enable automatic purging for this report log check box and then click Apply.

Report Log Configuration - 7 🛛 🔹 👔
Basic Retention Mappings Custom Attributes History
The retention time defines an expiration age for report log data. Records older than this age will be purged from the report log if automatic or manual purging is requested.
Purge records older than 400 days
Automatic
Records can be set to be purged automatically according to the schedule set under Server Configuration.
Enable automatic purging for this report log
Manual
Records can be purged manually. Purge Now
Confirm auto-save

5. Repeat for all report logs.

#### **Restart Interaction Recorder data purging**

If you use Interaction Recorder, restart data purging on the CIC 2015 R1 or later server.

#### To restart Interaction Recorder data purging:

- 1. In Interaction Administrator, click the Interaction Recorder container and then click the Policy Editor subcontainer.
- 2. In the right-side pane, double-click Configuration.
- 3. In the Interaction Recorder Policy Editor dialog box, click the Retention tab.
- 4. On the Retention tab, select the check box next to your purge policy and then, in the menu bar, click Apply.

View Help	order Policy Edito	r					
Initiation Retenti	ion Security						
New Policy	. Change Policy	Copy	🛃 Delete	<b>^</b> .	F 🚳	Re-apply	Options
Policy (applie	d in the order shown	)				Actions	
🗹 Default Stora	ge Location	,				<b>\$</b>	
🖌 Purge							<b>(2)</b>
Policy description (	(dick on underlined y	alue to edit):					
This policy appl perform the fol retention perio	ies to all recording lowing action(s): od set to <u>Forever</u> ording and media	<u>js</u>					
purge the rec							
purge the rec							
purge the rec							
purge the <u>rec</u>							
purge the rec							
purge the rec							Þ
purge the rec							Þ
purge the rec							≜pply
purge the rec							Apply
purge the rec							Apply Modified
purge the rec							Apply Modified

5. In the Re-apply retention policies dialog box, click Re-apply to all recordings and then click OK.

Reapply retention policies	- 🗆 🗙
For which recordings do you want to apply the retention policies?	
<ul> <li>Re-apply to recordings created on or after: 6/ 1/201</li> <li>Re-apply to all recordings</li> </ul>	2 🔻
OK Ca	incel

# Restart Interaction Tracker data purging

Complete these steps on the CIC 2015 R1 or later server.

#### To restart Interaction Tracker data purging:

- 1. In Interaction Administrator, click the Interaction Tracker container.
- 2. In the right-side pane, double-click Configuration.
- 3. In the Interaction Tracker Configuration dialog box, click the Data Purging tab.
- 4. On the Data Purging tab, select the Enable Purging check box and then click OK.

Interaction Tracker Configuration	? ×
Import and Reassignment   Image and URL   Items Tracked   External Utilities   Time Naming   Server   Database   Multi-Language Support	sheet Reporting Data Purging
Enable Purging	
Purging Options	
Purge data at this time of day:     2:30:00 AM       Purge data older than     34	
OK Cancel	Apply

## **Reapply Interaction Recorder Security Policies**

If you use Interaction Recorder, reapply your company's security policy manually and restart Interaction Recorder to ensure that recordings appear in CIC.

To reapply Interaction Recorder Security Policies:

- 1. In Interaction Administrator, click the Interaction Recorder container and then click the Policy Editor subcontainer.
- 2. In the right-side pane, double-click Configuration.
- 3. In the Interaction Recorder Policy Editor dialog box, click the Security tab.
- 4. On the Security tab, clear the check box next to the applied security policy to de-activate the policy, and then click Apply.



5. Select the check box next to the applied security policy to activate the policy, and then click **Apply**.

- 6. Close Interaction Administrator Policy Editor and Interaction Administrator.
- 7. Start IC System Manager, right-click the **Recorder Server** subsystem, and then click **Restart Subsystem**.

File Monitor Control	irac	e view	Help					
Subsystem	S	s Status	Startup Type	PID	Elapsed Time	CPU Us	Memory Usage	
1 Client Services	19	Started	Automatic	3340	4 days, 12 hours, 9 minutes, 48 seconds	0	28912	
Treedback Server	20	Started	Automatic	3864	4 days, 12 hours, 9 minutes, 44 seconds	0	36792	
1 Optimizer Server	21	Started	Automatic	8112	4 days, 12 hours, 9 minutes, 40 seconds	0	44516	
1 Recorder Server	22	Started	Automatic	5340	4 days, 12 hours, 9 minutes, 35 seconds	0	38964	
🕆 Tracker Server	23	Started	Automatic	7060	4 days, 12 hours, 9 minutes, 32 seconds	0	45904	
1 AcdServer	24	Started	Automatic	7716	4 days, 12 hours, 9 minutes, 27 seconds	0	25908	
1 OutOfProcCustom	25	Started	Automatic	6648	4 days, 12 hours, 9 minutes, 25 seconds	0	17192	
🕆 QueueStatProvider	26	Started	Automatic	7212	4 days, 12 hours, 9 minutes, 22 seconds	0	21344	
🕆 Session Manager	27	Started	Automatic	8860	4 days, 12 hours, 9 minutes, 19 seconds	0	85212	
🕆 TsServer	28	Started	Automatic	3708	4 days, 12 hours, 9 minutes, 12 seconds	0	74516	
🕆 FaxServer	29	Started	Automatic	8528	4 days, 12 hours, 9 minutes, 6 seconds	0	30992	
🕆 IpServer	30	Started	Automatic	5668	4 days, 12 hours, 9 minutes, 3 seconds	0	24084	
1 SMSServer	31	Started	Automatic	6268	4 days, 12 hours, 9 minutes, 0 seconds	0	24888	
🕆 StatAlertServer	32	Started	Automatic	4012	4 days, 12 hours, 8 minutes, 56 seconds	0	41764	
🕆 StatServer	33	Started	Automatic	3664	4 days, 12 hours, 8 minutes, 48 seconds	0	32400	-
1 WebProcessor	34	Started	Automatic	4328	4 days, 12 hours, 8 minutes, 44 seconds	0	40196	
A	05	Charles of	A	0064	A data to become the data and agreeds		04140	ř

8. Click **Yes**. The subsystem restarts.

# **Prepare for Interaction Dialer Database Migration**

This section is for Interaction Dialer sites only. It describes the procedures to complete before migrating an Interaction Dialer 2.4/3.0 database to an Interaction Dialer 4.0 database using CIC Database Migration Assistant for Dialer. **At this point in the migration process, you should have migrated the CIC database**.

# Prepare the CIC Database Migration Assistant client computer for the Dialer database migration

This section describes how to prepare the CIC Database Migration Assistant client computer for the Dialer database migration.

# Copy the UDL folder and Dialer configuration file to the CIC Database Migration Assistant client computer

- 1. Copy the UDL folder and the Dialer configuration file (dialer config.xml) from the 2.4/3.0 CIC server.
- 2. Paste the UDL folder and Dialer configuration file in the same folder on the CIC Database Migration Assistant client computer.

When you run the CIC Database Migration Assistant for Dialer, it asks you to browse to the Dialer configuration file and assumes the UDL files exist in the same directory or a /UDL subdirectory.

**Note:** Genesys recommends copying these files directly from the 2.4/3.0 CIC server to the CIC Database Assistant client computer, rather than using a network share.

# Configure Oracle TNS names/Net Service names on the CIC Database Migration Assistant client computer

If you are migrating an Interaction Dialer Oracle database, note that the CIC Database Migration Assistant does not migrate the Connection Information for Oracle Services. If you select a migrated UDL file in Interaction Administrator and attempt to test the connection, it can result in an error post-migration.

To avoid this error, configure the TNS names on the CIC Database Migration Assistant client computer using one of the following methods:

- Copy TNS names entries from TNSNAMES.ORA on the 2.4/3.0 CIC server to TNSNAMES.ORA on the CIC Database Migration Assistant client computer manually.
   -OR-
- Use Oracle NetManager on the CIC Database Migration Assistant client computer to configure the same Net Service Names that the UDL files use on the 2.4/3.0 CIC server.

#### Important!

Complete the same procedure on the 4.0 CIC server.

# Upgrade the Interaction Dialer 2015 R1 or later database schema

You upgraded the Interaction Dialer 2015 R1 or later database schema when you upgraded the CIC 2015 R1 or later database schema, as described in <u>Prepare for CIC Database Migration</u>, using the CIC Database Script Execution Tools (SQL Server) or when you ran the individual database upgrade scripts (Oracle) manually.

# Prepare the Interaction Dialer 2.4/3.0 and Interaction Dialer 2015 R1 or later databases

This section describes how to prepare the Interaction Dialer 2.4/3.0 and Interaction Dialer 2015 R1 or later databases for the migration.

## SQL Server pre-migration procedures for Dialer

#### Modify the recovery mode for SQL Server

If you are migrating a SQL Server database, modify the recovery mode to increase the performance of the migration and reduce disk space requirements. SQL Server has three recovery modes: Full, Simple, and Bulk Logged. By default, the database uses Full recovery mode. Switching to Bulk Logged recovery mode significantly impacts the amount of time required, and the size needed for transaction logs.

#### To modify the recovery mode for SQL Server:

1. On a first migration run and when the CIC 4.0 database is empty (except for a few rows added to the Tracker tables at install time), delete the Tracker tables.

Note: You can delete the Tracker tables by selecting the appropriate check box on the Select Table Groups to Migrate page in CIC Database Migration Assistant or by running the Delete\_Tables\_PreMigration.sql script located in the \Scripts folder in the CIC Database Migration Assistant installation folder.

The CIC Database Assistant does not delete the INTX\_PARTICIPANT and INTXSEGMENT tables. It is important to note that if any data exists in these two tables, the system doesn't delete the data from any of the Tracker tables. This precaution exists to preserve live 4.0 production data.

If your 4.0 system is in production, but not live, and you choose to delete all Tracker data, you must complete these steps in the following order:

- a. Delete all data from INTX\_PARTICIPANT
- b. Delete all data from INTXSEGMENT
- c. Select the Delete Existing Tracker Data check box or run the Delete\_Tables\_PreMigration.sql script.
- 2. In Microsoft SQL Server 2008 Management Studio, switch to Bulk Logged recovery mode to take advantage of limited logging.

Note: Failure to switch to Bulk Logged recovery mode may result in exhausting transaction log disk space.

- 3. Complete a full backup of the CIC 2015 R1 or later database to have the features associated with the Bulk Logged recovery mode take effect.
- 4. Proceed with the migration as described in Migrate the CIC 3.0 Database.
- 5. After migrating the database, switch back to Full recovery mode, or the recovery mode of your choice, and complete a full backup of the CIC 2015 R1 or later database.

**Note:** Since changing the recovery mode of the database is something you may not want to do once the database is in production, it is highly recommended that you migrate all the historical data you intend to move before putting the database into production.

#### Create a SQL Server user

Genesys recommends using the same SQL Server user that you created when you prepared the CIC 2.4/3.0 and CIC 2015 R1 or later databases for the migration, as described in Prepare for CIC Database Migration.

#### **Oracle pre-migration procedures for Interaction Dialer**

#### Set the authentication parameter for Dialer

You set the authentication parameter for Oracle when you prepared the CIC 2.4/3.0 and CIC 2015 R1 or later databases for the migration, as described in <u>Prepare for CIC Database Migration</u>.

#### Create an Oracle user

Genesys recommends using the same Oracle user that you created when you prepared the CIC 2.4/3.0 and CIC 2015 R1 or later databases for the migration, as described in <u>Prepare for CIC Database Migration</u>.

#### Configure Oracle TNS names/Net Service names on the CIC server

If you are migrating an Interaction Dialer Oracle database, note that the CIC Database Migration Assistant does not migrate the Connection Information for Oracle Services. If you select a migrated UDL file in Interaction Administrator and attempt to test the connection, it can result in an error post-migration.

To avoid this error, configure the TNS names on the CIC Database Migration Assistant client computer using one of the following methods :

- Copy TNS names entries from TNSNAMES.ORA on the 2.4/3.0 CIC server to TNSNAMES.ORA on the 4.0 CIC server manually.
- Use Oracle NetManager on the 4.0 CIC server to configure the same Net Service Names used by UDL files on the 2.4/3.0 CIC server.

#### Important!

Complete the same procedure on the CIC Database Migration Assistant client computer.

## Cross-platform data migration

Prior versions of Interaction Dialer stored historical information about campaigns in the same database as the accompanying contact list. Interaction Dialer 2015 R1 or later stores historical campaign data in the CIC database. Since Interaction Dialer customers may have existing Dialer contact databases on multiple database platforms, the CIC Database Migration Assistant facilitates consolidating the historical information into the unified database.

For instructions on connecting an Oracle database to a SQL Server database, or connecting a SQL Server database to an Oracle database in preparation for running CIC Database Migration Assistant for Dialer, see KB article: <u>https://my.inin.com/Support/Pages/KB-Details.aspx?</u> EntryID=Q136580478100915.

# **Apply Interaction Dialer ESs**

If you are on Interaction Dialer 4.0 SU 1, obtain and apply the appropriate ESs required for the Dialer database migration.

## **CIC** server

- CIC\_SU1 (SU1-DIALER-7545)
- CIC\_SU1 (SU1-DIALER-7546)
- CIC\_SU1 (SU1-DIALER-7697)
- CIC\_SU1 (SU1-DIALER-7850)

## CIC/ODS 2015 R1 or later server

- ODS\_SU1 (SU1-DIALER-7545)
- ODS\_SU1 (SU1-DIALER-7546)

# Migrate the Interaction Dialer 2.4/3.0 Database

This section provides instructions for migrating a Dialer 2.4/3.0 database to Dialer 2015 R1 or later database using CIC Database Migration Assistant for Dialer. It is critical that you run CIC Database Migration Assistant for CIC first, and then run CIC Database Migration Assistant for Dialer before importing CIC and Dialer configuration data using Interaction Migrator.

# **Dialer database migration considerations**

CIC Database Migration Assistant for Dialer supports Interaction Dialer database migration fully. Best practice recommends that you consider the following:

• Decide how to handle deleted workflows. You can purge deleted workflows, or you can retain them for other reasons (for example, you may want to run reports on deleted workflows). To prevent or eliminate deleted workfrows from appearing in CIC Database Migration Assistant, remove them from the dialer\_config.xml configuration file. For more information on purging deleted workflows, see "Clean Up Deleted Configuration Objects: in the Interaction Dialer's Dialer Tools documentation.

**Note**: CIC Database Migration Assistant does not require you to purge deleted workflows before you migrate the database. If you do not purge these workflows, the deleted workflows contain **Yes** in the **Deleted** column on the **Dialer Workflows to Migrate** page.

- Subdivide migration by workflow. If you encounter any issues during migration, subdividing the migration by workflows helps PureConnect Customer Care narrow down which workflow contains the migration issue. To subdivide by workflows, use CIC Database Assistant for Dialer to migrate a single workflow, or a select number of workflows. Repeat this process for the remaining workflows, running CIC Database Assistant for Dialer multiple times until you migrate all workflows.
- Depending on the filters you select, Dialer data might not migrate. For example, if you select a set of workflows and a date range that don't match. If Dialer data does not migrate, confirm your filter settings and run CIC Database Migration Assistant for Dialer again. If your settings are correct and the data still does not migrate, contact PureConnect Customer Care.
- Delete workflows that do not contain historical workflow tables. To avoid an error migrating the dialer database if a workflow does not contain any of the historical workflow tables (for example, the Agent Stats or Call History tables), delete workflows that remain in the configuration file.

# Migrate the Dialer 2.4/3.0 database

This section describes how to migrate the Dialer 2.4/3.0 database using CIC Database Migration Assistant for Dialer. Ensure that you are logged on as the same user who ran the CIC Database Migration Assistant to migrate the CIC 3.0 database.

## To migrate the Dialer 2.4/3.0 database:

- 1. Though not required, Genesys recommends that you stop CIC Service on the CIC/ODS server to:
  - Ensure that no one adds new data to the Dialer 2.4/3.0 database schema while a migration is occurring.
  - Prevent access to a Dialer ODS 4.0 server during migration so that the migration uses the database server exclusively.

**Note:** Depending on how much historical reporting data that you have, it can take a long time to migrate your historical data.

 Start CIC Database Migration Assistant for Dialer on the CIC Database Migration Assistant client computer from the CIC Database Migration Assistant shortcut on the desktop.



3. On the Welcome page, click Next.

00°	<ul> <li>This wizard guides you through the process of migrating data in Dialer 2.4 and 3.0 databases to a CIC 2018 R1 database. The wizard:</li> <li>Generates custom script files from the workflows, date ranges, and site ID's that you specify.</li> <li>Executes the custom script file if specified.</li> <li>Migrates only the historical Dialer data</li> <li>To continue, click Next.</li> </ul>
S GENESYS	

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

4. If this isn't your first time running CIC Database Migration Assistant for Dialer, the Past Migration Utility Executions page appears. To use settings from a previous migration, or restart a migration to run the scripts, click the migration to run and then click Next.

		CIC 2018 R1 Da	tabase N	ligration	Assista	ant		,
t Migration Utility Ex elect one of the previous en ad configurations for that i	cecutions ecutions below to l run. Otherwise, sele	load in the settings ect 'Next'.						
	Date Executed	Migration Status	Start Date	End Date	Site ID	Source Database	Target Database	Link Name
	09/21/17	Incomplete		09/21/17				
_								
8								
S GENESYS								
							Cancel < B	ack Next

Note: To unselect a migration run, hold down the Ctrl key and click the migration run.

The **Past Migration Utility Execution** page contains settings, configuration, and status details of past migrations. **Date Executed:** Date a user opened the CIC Database Migration Assistant for Dialer. **Migration Status:** Status of the script execution.

**Completed:** CIC Database Migration Assistant for Dialer generated and ran the scripts.

**Failed version check:** You attempted to migrate from a Dialer 2.4/3.0 database or to a Dialer 4.0 database version that the currently running version of CIC Database Migration Assistant for Dialer doesn't support.

Incomplete: You canceled the migration process before the scripts were generated.

**Ready for restart:** CIC Database Migration Assistant for Dialer generated the scripts but did not run them. You can restart the migration and have CIC Database Migration Assistant for Dialer run the scripts when you are ready.

**User completed:** CIC Database Migration Assistant for Dialer generated the scripts but did not run them. When you are ready, run the scripts manually.

Start Date: The date the migration run started.

End Date: The date the migration run stopped.

Source Database: The Dialer 2.4/3.0 database to migrate from.

Target Database: The Dialer 4.0 database to migrate to.

Link Name: The name of the link between the Dialer 2.4/3.0 and Dialer 4.0 databases.

5. On the **Database Server Credentials** page, in the **Server Type** drop-down list, select the type of database server you are using (for example SQL Server or Oracle.)

atabase Server Cre Select the appropriate Se 'Test Connection' to ver database name, and Dia	dentials erver type and enter t ify credentials and su ler configuration file.	he credentials. Use pply the links, target	
00	Server Type:	Select a database type Select a database type SQL Server Oracle	
S GENESYS			

The information that displays differs, depending on the type of server you selected. 6. Provide the requested information for the Dialer 4.0 database server.

Note: The Status Messages box lists your selections and the time you selected them.

For SQL Server: Specify the SQL Server information for the Dialer 4.0 database.

Select the appropriate 'Test Connection' to database name, and I	e Server type and enter t verify credentials and su Dialer configuration file.	the credentials. Use upply the links, targ	e et		
	Server Type:	SQL Server	-		
	Target Datab	ase			
	Server:		France CE		1/ 0007
	User Name:		Format: SE	TVER[ (INSTAINCE	JL,PORIJ
്	Password:				
ō		Test Conne	ection		
	Status Messa	ges			

**Server:** Name of the Dialer 4.0 database server. For SQL Server, include the instance and port number of the Dialer 4.0 database. To see an example, click the information icon under the **Server** box.

User Name: User name for logging on to the Dialer 4.0 database server.

Password: Password associated to the user name.

For Oracle: Specify the Oracle information for the Dialer 4.0 database.

গ		CIC 2018 R1	Database Migration	n Assistant	X
Database Server Cred Select the appropriate Ser 'Test Connection' to verify database name, and Diale	entials ver type and enter the cr y credentials and supply r configuration file.	edentials. Use the links, target			
	Server Type: Ora	cle	•		
	Target Database			ININ data tablespace:	*
	Server:			ININ index tablespace:	
	Port #:	1521		Target data tablespace:	
0	Service Name:			Tarret index tablerance	
O I	User Name:			Target index tablespaces	*
0	Password:				
		Test Connection			
	Status Messages				
	13:36:23: Selecte 13:37:37: Selecte	ed Oracle for databas ed SQL Server for dat	se type abase type		
SGENESYS	13:37:44: Selecte	ed Oracle for databas	se type		
				Cancel	< Back Next >

**Server:** Name of the Dialer 4.0 database server. For SQL Server, include the instance and port number of the Dialer 4.0 database. To see an example, click the information icon under the **Server** box.

Port #: Dialer 4.0 database server port number.

Service Name: Name of the service this instance of the Dialer 4.0 database connects to.

User Name: User name for logging on to the Dialer 4.0 database server.

Password: Password associated to the user name.

ININ data tablespace: Tablespace where the data for the ININ\_MIGRATION schema are.

ININ index tablespace: Tablespace where indexes for the ININ\_MIGRATION schema are.

Target data tablespace: Tablespace where Dialer 4.0 tables and stored procedures are.

Target index tablespace: Tablespace where Dialer 4.0 indexes are.

Note: If the system cannot locate the UDL file, UDL Missing appears in the Data Source Name column.

°00	enty coductable and [Date configuration Server Type: One Server: Part #: Server: Part #: Date Name: Password: Date Source Name dot1g ord UCX Mesing State Messager	ngghy the links, Bis. e de e di fS fS fS fS fS fS fS fS fS fS fS fS fS	Bills     Bills     Center     Test Connect     Set     Workflow Court     3     1	ton File DA Orate Dri Autonatically Orate Dri Autonatically Orate Dri Autonatically	× × ×	20% data tablespace 20% inder tablespace Target data tablespace Target index tablespace	USBIS V USBIS V USBIS V USBIS V
영GENESYS	[0][9:47] Seech	ed Oracle for Gatab	ese type				

When you click **Next**, the workflows associated to the missing UDL file appear. In the following example, the testDeleteWorkflow was contained in a UDL file deleted prior to running CIC Database Migration Assistant for Dialer. Click **Next** to migrate the remaining valid workflows.

<b>S</b>		CIC 20	18 R1	Dat	tabas	se Mig	ratio	on Assistant	-		×
Select Dialer Workflows Select the Daler workflows message will be displayed if a particular workflow.	to Migrate to migrate t there are an	e to new database. A sy errors with migrating									
	Selected	Nane	Status	Paused	Deleted	Data Source	Vald	Error Text			
		13: Callable Hours Worldfow	Off	No	Yes	dbilg	No	Source data tables not found			
		workflow1	Active	No	Yes	db11g	No	Source data tables not found			
		Workflow67	Off	No	Yes	dbilg	Yes				
		db10gWorkflow	Completed	No	Yes	db00g	Yes				
		testDeleteWorldlow	Off	No	Yes	TestDelete	No	Connection Error			
•											
- i											
donue autor											
BGENESYS											
									(Current)	(c. Reads)	ALC: N A
									Lancel	< Back	1.400C > -

- 7. After providing the Dialer 2015 R1 or later database server information, click Test Connection. The system tests the following:
  - Connection to the Dialer 2015 R1 or later database server. If the connection isn't successful, verify that the information you provided is correct.
  - (SQL Server only) CREATE LINK permission. If you don't have this permission, the system displays a message to that effect and makes Create Link unavailable.
  - (Oracle only) Permission for running a migration. If you don't have this permission, the system displays a message to that effect. Check your permissions or provide credentials for a user who has the permission.
  - (Oracle only) Permission to migrate to the selected Dialer 2015 R1 or later database. If you don't have this permission, the system displays a message to that effect. Select a different Dialer 2015 R1 or later database or check your permissions.
- 8. Click Load Dialer Configuration File, navigate to the directory in which Dialer\_config.xml resides, and double-click the file to include it in the migration.

- 9. To specify the link to connect one Dialer 2.4/3.0 database to one Dialer 2015 R1 or later database, do one of the following:
  - Use database links you created before running CIC Database Migration Assistant for Dialer: In the Data Source Name column, select the database you want to migrate and from the Link drop-down list select the appropriate database link. Repeat this step for each database you want to migrate.
  - Allow CIC Database Migration Assistant for Dialer to create the link for you: In the Data Source Name column, select the data database you want to migrate and from the Link drop-down list ensure Create Link Automatically is displayed (this is the default option). Repeat this step for each database you want to migrate.
  - Create a link now: If a link doesn't exist between the Dialer 2.4/3.0 and Dialer 4.0 databases, create a link for each database you want to migrate.

Note: Creating a link only works to create a link to the same type of database. Create cross-database links manually.

- a. In the Data Source Name column, select the data database to migrate and then, in the Link list box, click Create Link.
- b. In the **Create Link** dialog box, provide the information for the new link and, in the **Link Name** box, type the name to assign to the link. The link name cannot start with a non-alphabetic character.

🧐 Create Link	<b>—</b>
Source Database	
Server:	
User Name:	
Password:	
Link Name:	ININ_MIGRATION_LINK
·	Create Link)

Note: The information that displays in the Create Link dialog box differs depending on the type of server you selected (SQL Server or Oracle).

- c. Click Create Link ...
- d. In the **Data Source Name** column select the database you want to migrate and then, in the **Link** list box, click the link you created for it. Repeat this step for each database you want to migrate.
- 10. SQL Server only: On the Database Server Credentials page, in the Target DB name list box, select the name of the Dialer 4.0 database and then click Next.

#### Notes:

- If you attempt to migrate from a Dialer 2.4/3.0 database version, or to a Dialer 2015 R1 or later database version that the currently running version of CIC Database Migration Assistant for Dialer doesn't support, an error message appears. Ensure that the database version is compatible with this version of CIC Database Migration Assistant for Dialer, as described in <u>Prepare for Interaction Dialer Database Migration</u>.
- For Oracle users, the target database is a fixed source and cannot be modified. Therefore, the **Target DB** name drop-down list does not appear in Oracle environments.
- 11. On the Dialer Workflows to Migrate page, select the Dialer workflows to migrate and then click Next.

	Selected	Name	Status	Paused	Deleted	Data Source	Valid	Error Text
	10	B: Callable Hours Workflow	Active	No	Yes	New	Yes	
	13	B: Service Provider Workflow	Off	No	Yes	New	Yes	
	1	B: Survey Workflow	Active	No	Yes	New	Yes	
		Oracleworkflow	Completed	No	Yes	Oracle116	No	Connection Error
	83	SQL2000	Completed	No	Yes	Sql2000test	Yes	
	13	Sql2005 Workflow	Error	No	Yes	SQL2005testing	Yes	
	2							
•	1	Workflow2	Completed	No	Yes	New	Yes	
		Workflow2000	Off	No	No	Sql2000test	No	Source data tables not found
Ŭ								

Note: Right-click in the Workgroups list to view a selection menu. This menu allows you to filter the workgroups you want to migrate. You can Select All, Select All Paused, Select All Deleted, Select All By Status (Active, Completed, Off, Error), Select All By Data Source, or Clear Selection.

12. On the Data Filter Settings page, To limit the migration by date range, provide the migration parameters and then click Next.

<b>J</b>	CIC	2018 R1 Database	Migration Assistant		x
Data Filter Settings If you would like to limit th please enter that informati	e migration by a date on here.	range or Site ID,			
	Start Date: End Date: Source Data Tim	1/1/1900 9/9/2013 e Zone{ (UTC-05:00) Eastern Tim	IS e (US & Canada) •		
00					
SGENESYS					
				Cancel < Back	lext >

Start Date: Start date to limit the database records that migrate.

End Date: End date to limit the database records that migrate.

Note: All records inserted after 00:00 UTC on the start date and before 24:00 UTC on the end date migrate. You cannot include the current date in the date range.

Source Data Time Zone: Time zone to limit the database records that migrate.

13. On the Preview Scripts page, choose one of the following methods to preview the scripts before you run them:

a generated script. Or pres root folder for the generati	is "Open Script Location" to view ed scripts.	Generated Scripts
00°	DALER     Agentitats     Content of the second	Scripts:         DisableIndexes         DisableConstraints         EnablePKS         EnablePKS         EnablePKS         EnablePKS         SosetScript_TerWFlow         InsertScript_Workflow2
S GENESYS		

- a. In the left column, click a workgroup to expand it and then click a table to display its scripts in the right column.
- b. In the right column, double-click a script to view its contents. The script displays in your chosen text editor.

AgentStats - Notepad	
File Edit Format View Help	
<pre>\$POOL '&amp;1' SET DEFINE OFF /* HassiteId     DateTimeColumn     StartDateTime     EndDateTime     SiteId     ParentSiteIdSchema     ParentSiteIdKeyColumn     ChildSiteIdKeyColumn     ParentDateTimeColumn     ParentDateTimeColumn     ParentDateTimeKeyColumn     ChildDateTimeKeyColumn     TableHasData     Input     TimeZone     TargetSchema     Target table ININ_DIALER_40. }**</pre>	<pre>= Y = AGENTTIMEUTC = NONE = 2013-03-13 00:00:00 = NONE = 0 = NONE = (GMT-05:00) Eastern Time (US &amp; Cana<sub>da</sub>) = ININ_DIALER_40 = AGENTSTATS = dblogworkflow 2013-03-13 16:45:33.961000000. */ AgentStats is empty. */</pre>
SET SERVEROUTPUT ON; DECLARE V_START V_RowCount v_END v_TargetSchema v_TargetTable v_Dialerworkflow v_ZoneName BEGIN /* Since the target table is em v_START := SYS_EXTRACT_UTC(SYS INSERT INTO ININ_DIALER_40.AGEN SELECT campaignname,siteid,T propertyname,propertyvalue FROM ANU_DIALERGOLD1.I3_DB10 , inin_migration.timezone tz where tz.zone_name = and TIME_START_LOCAL =	<pre>TIMESTAMP := SYS_EXTRACT_UTC(SYSTIMESTAMP); NUMBER := 0; TIMESTAMP; VARCHAR2(30) := 'ININ_DIALER_40'; VARCHAR2(30) := 'AGENTSTATS'; NVARCHAR2(255) := 'dblogworkflow'; VARCHAR2(70) := '(GMT-05:00) Eastern Time (US &amp; Canada)'; pty, we do not need to worry about duplicates, so there is no NOT EXISTS claus TIMESTAMP); TSTATS(campaignname,siteid,odsoffset,agenttimeUTC,agentid,stageid,callid,call; Z.gmt_offset,A.AgentTime + NUMTODSINTERVAL(TZ.gmt_offset * (-1),'SECOND'),agen GWORKFLOW_ASO@NEWESTLINK A v_ZoneName (SELECT MAX(TIME_START_LOCAL) FROM inin_migration.Timezone tz2 WHERE tz2.TIME_START_LOCAL &lt;= A.AgentTime AND TZ2.zone_name = v_ZoneName</pre>

c. Click **X** in the upper right corner of the window to close it.

- a. On the Preview Scripts page, click Open Script Location.
- b. Drill down to the script you want to view and click a single script to select it. The script appears in the right pane.

								×
Intelligence + MigrationUtility + 2	0120223_102547 +	SqlServer > DisableConst	raints	<b>- - 4</b> <sub>7</sub>	Search DisableCon	straints		٩
<ul> <li>Share with          New folder     </li> </ul>						80 <b>•</b>		0
Name AddrType.sql AddrType.sql ConnectionType.sql ConnSubType.sql IndivType.sql Location.sql Organization.sql OrgType.sql Title.sql	V* UTC file O DECLARE @STAU UPDATE SET WHERE ININ_MIGRATIO AND ;	generation time is RT DATETIME2 = SYS ININ_MIGRATION.Hi Exec_Disable_CK_S ,Exec_Disable JOB_NBR ON.History_Jobs Schema_Name TABLE_NAME	2012-02-23 UTCDATETIME story_Stats tart_UTC = e_CK_End_UT =	15:26:04.6 (); estart c = sysut = (select 'dbo' = 'Addrtyp	346720. */ CDATETIME() MAX(JOB_NBR) e'		)	FROM
Vate modified: 2/23/2 ver Query File Size: 484 by	/tes	Uate created: 2/25/2012 10	20 AM					

c. To open the script, double-click the script in the left column. The script displays in your chosen text editor.



- d. Click X in the upper right corner.
- 14. On the Preview Scripts page, select an option for running the scripts and then click Next.

Note: To change parameters before running the scripts, click Back. Your changes reflect when the scripts regenerate.

Execute now: If selected, the system runs the scripts now after the CIC Database Migration Assistant Completed page appears.

**Execute later:** If selected, the system postpones running the scripts. You can open CIC Database Migration Assistant for Dialer and select this migration when you are ready for the system to run the scripts.

**Execute manually:** If selected, you can run the scripts manually. If you choose this option, it is critical that you run the scripts in a specific order. Genesys doesn't provide support for running the scripts manually.

Notes:

- The amount of time it takes to run the scripts depends on the amount of data migrating. Migration can take anywhere from minutes to hours.
- You can view the scripts while they are running.

15. If you chose Execute now, the system begins running the scripts and the status appears on the Executing scripts, please wait page.

xecuting scripts, pleas	(11:27:49) Beginning execution of script TimeZoneInfoPath
00°	<ul> <li>[13:27:48] Completed execution of script DisableConstraints for table group DIALER</li> <li>[13:27:48] Beginning execution of script DisableConstraints on table Agent2tats</li> <li>[13:27:50] Beginning execution of script DisableConstraints on table Agent2tats</li> <li>[13:27:50] Completed execution of script DisableConstraints on table CallHistory</li> <li>[13:27:50] Completed execution of script DisableConstraints on table Agent2tats</li> <li>[13:27:50] Completed execution of script DisableConstraints on table CallHistory</li> <li>[13:27:50] Completed execution of script DisableConstraints on table GallHistory</li> <li>[13:27:50] Completed execution of script DisableFKs for table group DIALER</li> <li>[13:27:50] Beginning execution of script DisableFKs on table CallHistory</li> <li>[13:27:50] Completed execution of script DisableFKs on table CallHistory</li> <li>[13:27:50] Completed execution of script DisableFKs on table Agent2tats</li> <li>[13:27:50] Completed execution of script DisableFKs on table Agent2tats</li> <li>[13:27:50] Completed execution of script DisableFKs on table Agent2tats</li> <li>[13:27:50] Completed execution of script DisableFKs on table Agent2tats</li> <li>[13:27:50] Completed execution of script DisableFKs on table Agent2tats</li> <li>[13:27:50] Beginning execution of script DisableFKs on table GallHistory</li> <li>[13:27:50] Completed execution of script DisableFKs on table GallHistory</li> <li>[13:27:50] Beginning execution of script DisableFKs on table CallHistory</li> <li>[13:27:50] Beginning execution of script DisableIndexes on table CallHistory</li> <li>[13:27:50] Completed execution of script DisableIndexes on table Agent2tats</li> <li>[13:27:50] Completed execution of script DisableIndexes on table Agent2tats</li> <li>[13:27:50] Completed execution of script DisableIndexes on table Agent2tats</li> <li>[13:27:50] Completed execution of script DisableIndexes on table Agent2tats</li> <li>[13:27:50] Completed execution of script DisableIndexes on table Agent2tats</li> <l< th=""></l<></ul>
<b>GENESYS</b>	

When completed, click Finish. The CIC Database Migration Assistant Completed page appears.

IC Database Migration	Assistant Completed	i Database Migra	uon A	ssistant		
00°	IC Database Migration A Te dese the ward, did Freih. For more information, including an	ssistant Completed y additional steps to perform, p Weakfear Name AcoCamp2,Aco/Wok1 AcoCamp2,Aco/Wok1	ee the IC I Agent B	Migration Guide in teo. CalHutoy 0 0	the IC Documentation Library	6
S GENESYS						
			_	_		Field

**Note:** If you are migrating in stages, restart CIC Database Migration Assistant for Dialer to change settings and generate the next set of scripts.

16. If you chose **Execute later**, the system saves the scripts so that you can run them later. Click **Finish.** If you are migrating in stages, restart CIC Database Migration Assistant for Dialer to change settings and generate the next set of scripts.

The CIC Database Migration Assistant Completed page appears.

5	CIC 2018 R1 Database Migration Assistant
IC Database Migratic	n Assistant Completed
000	The scripts have been generated and can be reviewed. Please restart this assistant to execute them.
S GENESYS	Cancel Finish.

Note: When you are ready to run the scripts, do the following:

- a. Open CIC Database Migration Assistant.
- b. On the **Past Migration Utility Executions** page, find the entry with the date and time that matches when you generated the scripts, and with a **Migration Status** of "Ready for restart." Select this entry and then click **Next**. The **Script Generation** page appears.
- c. Click **Execute now**, and then click **Next**.
- d. A message displays indicating the scripts are being run. After the scripts are run, click Finish.
- 17. If you chose **Execute manually**, the system saves the scripts and creates a batch file so that you can run the scripts manually. The batch file is **ExecuteMigrationScripts.bat** and it is in the root directory where the scripts are (for example, %APPDATA%\Interactive Intelligence\MigrationUtility\[date time]).

#### Warning!

If you double-click the batch file or right-click the batch file and then click **Open**, the system **runs** the scripts.

Click Finish. The CIC Database Migration Assistant Completed page appears.

ব	CIC 2018 R1 Database Migration Assistant	×	
IC Database Migration A	ssistant Completed		
00°	IC Database Migration Assistant Completed Mgration scripts batch file has been exported.		
<mark>ଟ୍</mark> ଟ GENESYS		Cancel Finish	
Note: You can use t For manual scr that exact orde ExecuteMign	he batch file in two ways: ipt execution, you can use it to view the order in which t r. It's critical that you run the scripts in the order specifi ationScripts, bat <b>and click Edit</b> .	o run the scripts and the ed. To view the batch fil	en run the scripts manually usi e, right-click

• For automated script execution, to have the system run the scripts, double-click ExecuteMigrationScripts.bat.

**Note:** If a catastrophic failure occurs (for example, power loss) while the migration scripts are running, run the MigrationCleanup.bat batch file located in the root directory where the scripts are stored (for example, %APPDATA%\Interactive Intelligence\MigrationUtility\[date time]).

19. If you stopped CIC Service, restart it.

# Troubleshooting the CIC Database Migration Assistant for Dialer

When running the CIC Database Migration Assistant for Dialer, it's possible that the CIC 2015 R1 or later database schema cannot accommodate some source data, causing the migration to fail.

If you encounter a migration failure, find the offending source data and modify or purge it. For help with troubleshooting, see KB article: <a href="https://my.inin.com/Support/Pages/KB-Details.aspx?EntryID=Q134616021600411">https://my.inin.com/Support/Pages/KB-Details.aspx?EntryID=Q134616021600411</a>. The article lists the table groups and tables by which the CIC Database Migration Assistant migrates data, and displays these tables and table groups in the same patterns that CIC Database Migration Assistant for Dialer follows during a migration. Locate the table group and the failed table, and then expand the relevant section to find problems, causes, and solutions to the failure.

For further assistance, contact PureConnect Customer Care.

# **Complete Dialer database post-migration procedures**

After migrating the Dialer 2.4/3.0 database to 4.0, complete the post-migration procedures in this section.

# Run post-migration check script for Dialer

Genesys recommends that you run the MigrationCheck.sql script against the Dialer 4.0 database after migration to check for foreign keys, indexes, and constraints that remain disabled after the migration. If the migration disabled any objects, re-enable them before proceeding and before using the database with a production CIC/Dialer system. If you cannot re-enable an object, such as a foreign key, because of bad data, do one of the following to fix the data problem:

- For SQL Server, run the MigrationCheck.sql script in the \CIC Database Migration Assistant\Scripts\sqlserver folder on the CIC Database Migration client computer.
- For Oracle, run the MigrationCheck.sql script in the \CIC Database Migration Assistant\Scripts\oracle folder on the CIC Database Migration client computer.

# Move Dialer contact lists and update Dialer campaigns to point to new location (recommended)

The CIC Database Migration Assistant for Dialer moves historical Dialer data only; it does not move contact lists. Genesys recommends that you move contact lists to the 4.0 database server. For instructions on how to move a Dialer contact list and update a Dialer campaign to point to a new location, see KB article: <u>https://my.inin.com/Support/Pages/KB-Details.aspx?EntryID=Q13606990310036</u>.

# **Migrate the Configuration**

# Import CIC 2.4/3.0 Configuration Data

This section describes importing CIC 2.4/3.0 configuration data into a CIC 2015 R1 or later server using Interaction Migrator.

# Before you run Interaction Migrator to import CIC 2.4/3.0 configuration data

- Ensure that the initial run of CIC Setup Assistant completed successfully on the *import* CIC 2015 R1 or later server as part of your migration scenario.
- Ensure that CIC Database Migration Assistant migrated data successfully in a CIC 3.0 database to a new CIC 4.0 database as part of your migration scenario.
- Interaction Dialer: Ensure that CIC Database Migration Assistant for Dialer migrated data successfully in a Dialer 2.4/3.0 database to a new Dialer 2015 R1 or later database as part of your migration scenario.
- Before you import 2.4/3.0 configuration data, verify that the Network Interface Card (NIC) or NIC team uses the same name on the new server as on the existing server. Verify that the names are the same to ensure that the migrated lines function correctly.

# Run Interaction Migrator to import CIC 2.4/3.0 configuration data

This procedure describes how to import CIC 2.4/3.0 configuration data using Interaction Migrator.

**Note:** For Interaction Dialer, Interaction Migrator imports Interaction Dialer 2.4/3.0 configuration data along with the CIC 2.4/3.0 configuration data.

## To import CIC 2.4/3.0 configuration data:

1. Copy the CIC 2.4/3.0 configuration data file from your storage media (as described in the last step in Export CIC 2.4/3.0 Configuration Data) to a location on the CIC 2015 R1 or later server. For example, copy the file 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\CIC) as it overwrites critical files).

- 2. Log on to the CIC 2015 R1 or later server using the same domain user account that CIC Service is set to run under. The account is the same CIC administrator account used when you ra CIC Setup Assistant as part your migration scenario.
- 3. Stop CIC Service on the CIC 2015 R1 or later server. Interaction Migrator requires you to stop CIC Service when importing CIC data.

## Important!

If you are running a Switchover pair of CIC servers, you must stop the CIC Service on both servers. Once the process completes and you start the CIC Service on the computer where you are importing your configuration, you can restart the other server as backup. At that point, it replicates the new imported configurations from the primary CIC server. For more information, see the *Interaction Migrator Technical Reference*.

- 4. Start Interaction Migrator, either from the Interaction Migrator link on the desktop, or from Start -> Programs -> PureConnect -> Interaction Migrator.
- 5. On the Welcome page, click Next.

Ð	Interaction Migrator
	Welcome to Interaction Migrator for CIC
o°o	The Interaction Migrator is a wizard-based tool that exports and imports configuration data related to the CIC Server, Interaction Media Server, and other components of the Customer Interaction Center. Interaction Migrator is version independent. It can be used as part of a migration from one CIC release to another, or for recovery and version control. To continue, click Next.
<mark>ଟ୍ଟ</mark> GENESYS <sup>-</sup>	<mark>Zip and Email Logs.</mark> Build 0.0.0.0
	< <u>B</u> ack <u>N</u> ext > <u>Cancel</u>

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

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

•	Interaction Migrator	×
Genesys Interaction	on Migrator	°0°
	Which task would you like to perform?	
	<ul> <li>Import configuration data</li> <li>Export configuration data</li> </ul>	
	< <u>B</u> ack <u>N</u> ext > <u>C</u>	ancel

7. On the **Configuration** page, specify the location of the CIC 2.4/3.0 configuration data zip file and the folder to extract the CIC 2.4/3.0 configuration data file. Click **Migration Mode** and then click **Next**.

0	Interaction Migrator	X
Genesys Interact	tion Migrator	00
	Select the configuration data to import:	
	Migration Mode     O Recovery Mode	
	< Back Next >	Cancel

**Select the configuration data to import:** Location of the exported CIC 2.4/3.0 configuration data file (*ServerName\_DateTimeStamp.ininmigr*) on the USB key or other writeable storage location.

Select folder for imported files to be extracted to: Destination directory for the extracted the CIC 2.4/3.0 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 2015 R1 or later (for example, do not copy to the root of  $\I3\CIC$ ) as critical files are overwritten.

Set password for export file: If selected, you set a password on the CIC 2.4/3.0 configuration data file.

[Password]: Password on the CIC 2.4/3.0 configuration data file. This box is available if you selected Set password for export file.

**Create registry and file restore point:** If selected, Interaction Migrator creates a registry restore point for restoring the registry back to the point before you ran Interaction Migrator to import the CIC 2.4/3.0 configuration data. Interaction Migrator exports a registry of the Interactive Intelligence key in hive format. This file is in the \I3\CIC\Migrator folder and has a file name extension of .hive. Genesys recommends that you keep the default setting

Migration Mode: If selected, Interaction Migrator runs in migration mode. Use this option for this import task.

Notes:

- When moving data from one server to another, consider server name and site name changes. Interaction Migrator changes the data at run time before importing it into the new server.
- 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.
- 8. After Interaction Migrator loads the CIC 2.4/3.0 configuration data file and extracts the data, on the **Import Items** page, select the components to import and then click **Next**.

<b>O</b>	Interaction Migrator	X
Genesy Inte	s action Migrator	°0°
	Select items to import	
	Select All	
	< Back Next > Ca	incel

Notes:

- Interaction Migrator does not import CIC Data Source components as it would overwrite the CIC 2015 R1 or later configuration.
- Interaction Dialer: The Interaction Dialer configuration data appears in this list and is included in the CIC configuration data import process.
- **Important:** Ensure that you migrated the Tracker database using CIC Database Migration Assistant before proceeding 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.
- Interaction Desktop: Interaction Migrator converts client settings from Interaction Client .NET Edition 3.0 format to Interaction Desktop format. For more information, see the <u>Transition to Interaction Desktop Administrator's Guide</u> in the <u>PureConnect Documentation Library</u>.

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

The Import Status page displays real-time updates during the import process.

L)	Interaction Migrator	X
Gene	sys teraction Migrator	00°
	Import Status	
	Decompressing File: Program Files (x86)/Interactive Intelligence/Resources/I3tts/     Compressing File: Program Files (x86)/Interactive Intelligence/Resources/I3tts/     Decompressing File: Program Files (x86)/Interactive Intelligence/Resources/I3tts/     Compressing File: Program Files (x86)/Interactive Intelligence/Resources/I3tts/     Decompressing File: Program Files (x86)/Interactive Intelligence/Resources/I3tts/     Compressing File: Program Files (x86)/Interactive Intelligence/Resources/I3tts/     Com	
	Stop	
	< Back Next > C	Cancel

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

**Note:** To stop the process at any time, click **Stop**. After stopping the process, you can change your selections without exiting Interaction Migrator.

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

	Interaction Migrator	
Sene In	<b>sys</b> Iteraction Migrator	00°
	Import Status	
	Copying file C: \Program Files \Interactive Intelligence\Resources\DialTone(Norwa Copying file C: \Program Files\Interactive Intelligence\Resources\RingBack(United Copying file C: \Program Files\Interactive Intelligence\Resources\RingBack(Italy).\     Copying file C: \Program Files\Interactive Intelligence\Resources\RingBack(Singat Copying file C: \Program Files\Interactive Intelligence\Resources\RingBack(Resources\RingBack(Singat Resources\RingBack(Resources\RingBack(Resources\RingBack(Resources\RingBack(Resources\RingBack(Resources\RingBack(Resources\RingBack(Resources\RingBack(Resources\RingBack(Resources\RingBack(Resources\RingBack(Resources\RingBack(Resources\RingBack(Resources\RingBack(Re	
	Copying file C:\Program Files\Interactive Intelligence\Resources\tts_voice.i3seria	
	Import completed on 9/20/2017 11:11:12 AM Process Completed in 0h 0m 23s	-
	< Back Next >	Cancel

11. Click **Finish** to close Interaction Migrator and restart CIC Service.

0	Interaction Migrator
ooo	Interaction Migrator for CIC has finished!
Senesys <sup>®</sup>	To close this Wizard, click Finish. Zip and Email logs,
	< Back Finish Cancel

## 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.

# **Re-activate ACD email routing**

The version of Interaction Migrator in the current CIC 2.4/3.0 to CIC 2015 R1 or later migration package imports all mail providers and sets them to inactive during migration mode. Setting them to inactive ensures that the migration doesn't affect the statistics of emails queued into workgroups on the source CIC 2.4/3.0 server.

Once the CIC 2015 R1 or later server is in full production, re-activate ACD Email Routing for each workgroup that the CIC 2.4/CIC 3.0 server is no longer monitoring and determine which account to use to queue emails.
# **Review migrated server parameters**

Several CIC subsystems changed significantly in CIC 2015 R1 or later. The Interaction Migrator import transfers to the CIC 2015 R1 or later server the server parameters that you have set on your CIC 2.4/3.0 system and its subsystems, and appends <u>\_migrated</u> to the parameter names. The appendage keeps the system from overwriting server parameters set on the CIC 2015 R1 or later server before importing data. It also identifies which server parameters are set on the CIC 2.4/3.0 server.

A **Server Parameter Query** is available on the PureConnect Customer Care site at <u>https://my.inin.com/products/selfhelp/migrationsto40/pages/server-parameter-query.aspx</u>.

Accounts Product & Support In	formation Partner Portal	Consultant	Portal Reports	Barbara Martin -
Sile Actions • 🔛				
	VC"	All Site	s •	Q Advanced Search
OGEINES	13			
				Give Feedback
PRODUCT INFORMATION NEWS	SELF HELP TOOLS	MY INCIDENTS	CONTACT US	
Server Parameter Ouerv				
IC 2.4/3.0 TO IC 4.0				
COMMON SOLUTIONS	The Server Parameter Qu	ery enables a use	er to look up the fur	nctionality of server parameters that are config
IC DATABASE MIGRATION	subsystems saw signification appends " migrated" to t	nt changes in IC -	<ol> <li>Interaction Mig nes</li> </ol>	rator transfers the CIC 2.4/3.0 server parame
ASSISTANT	abbruas Turdhorea ra c	and ponomication mon	inge-	
TROUBLESHOOTING	The appendage keeps the also clearly identifies whi	e system from over	erwriting server par ters were set on th	ameters that may have been set on the IC 4.0
INSTALLATION MEDIA	display:	ch server parame	ters were set on the	e to 2.4/3.0 server. For each correctly matche
CEDIER DARINETER CLERK				
TRIAGE	<ul> <li>Parameter Text: This is</li> <li>Affacted Subsystem: T</li> </ul>	s the correct spelling his is the subcystem	and case of the param which uses this serves	NODE. In parameter to drive its behavior. Note that the featur.
TROUBLESHOOTING	parameter may involve	e multiple subsystem	s. Only the subsystem	most directly affected is listed here.
WEBINARS	Valid Values: This might	ht be a type such as	'String' or 'Integer' or	it may be a range of values depending on the parame
RECYCLE BIN	<ul> <li>First Valid In: This field</li> </ul>	d will display the rele	ase/ES/SU Number If I	known, that introduces the server parameter.
VIEW ALL SITE CONTENT	<ul> <li>No Longer valid Since:</li> <li>Description: This field</li> </ul>	orovides a more det.	alled description of who	ase/su version wherethe server parameter has been at the server parameter does. It may provide addition
	beyond what is listed in	n the above fields.	and a state in the second second	
	Enter the name of a serve	er parameter as o	onfigured on the IC	Search

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.

Once the server parameters migrate, query and remove the ones you don't need, and remove <u>\_migrated</u> from the ones that you do need.

# Handler post-migration procedures

If you use custom handlers, complete the handler post-migration procedures as described in Migrate CIC 2.4/3.0 Handlers.

#### **IP table names**

The Interaction Migrator import appends migrated to the IP table names to prevent collisions.

# Change in default SIP transport protocol

In CIC 2.4, new SIP lines default to using UDP for their transport. In CIC 3.0, the default transport protocol switched in response to some of the connectivity advantages that TCP offers. However, because of support issues, such as problems with TCP offloading and large sites impacted by the OS limit of 4000 TCP connections, the *default protocol changed back to UDP in CIC 2015 R1 and later*.

As a best practice, Genesys recommends setting up your environment using UDP as your SIP transport. However, if you are using TCP today and you import existing configurations into your CIC 2015 R1 or later server, those configurations remain set for TCP. Only new lines and stations default to UDP. Do *not* change those setups as part of your migration to CIC 2015 R1 or later. To minimize the set of changes you are implementing at any given time, complete those changes well in advance of, or after your move to CIC 2015 R1 or later, as a separate project.

# **Complete Interaction Dialer post-migration procedures**

Complete the Interaction Dialer configuration post-migration procedures in this section. Ensure that you reviewed the new features and changes in Interaction Dialer 2015 R1 or later described in <u>Interaction Dialer</u>.

# Review migrated Interaction Dialer settings and complete post-migration procedures in Interaction Administrator

Post-migration, review all Interaction Dialer Manager containers to locate and fix any errors that occurred during import, especially in Rule Sets and Policies Sets. The reasoning is that workflows don't exist in Interaction Dialer 2015 R1 or later and don't migrate.

Complete the following Interaction Dialer post-migration procedures in Interaction Administrator. Ensure that you reviewed the new features and changes in Interaction Dialer 2015 R1 or later described in <u>Interaction Dialer</u>.

For more information, see the Interaction Dialer Manager documentation in the PureConnect Documentation Library.

### **Reconfigure Rules and Policy Sets**

Interaction Migrator does minimal conversion for Rule/Policy statistics, and they can contain errors acquired during import. Because **Interaction Dialer 3.0** statistics do not match **Interaction Dialer 2015 R1 or later** statistics, reconfigure them manually to correct potential validation errors.

- 1. Open Interaction Administrator.
- In the Interaction Dialer > Advanced Interaction Dialer > Rule Sets container, reconfigure Rule Set statistics for your Interaction Dialer configuration.

🕞 Interaction Administrator - [400D5_5	U1]							
📄 File Edit View Context Help								_ 8 ×
🗟 👂 🕱 🖨 🖨 🛞 ≽ 🔒 👘								
🕀 🏇 Collective	Name							4
⊞ 🛒 400DS_SU1 - 4.0 SU3	Search	۶						
Licenses Allocation	[Ruleset Defaults]							
🛨 🌉 People	Low Number of Active	Agosta						n n
	Low Number of Active	Agents						
Interaction Recorder								×
Interaction Optimizer								
🕀 🏹 Interaction Analyzer	Box							
🖃 🌮 Interaction Dialer	🛛 🏴 Low Nu	mber of Active Ag	lents					•
🛄 Campaigns								
Scripts	Details							
Contact Lists		Display Name: Low Number	r of Active Age	ents				
Contact List Filters		Pulse						
		Rules						^
j Database Connections		Rule Name	Туре	Stop Evaluat	ting Enabled	Groups	-	
📝 Skill Sets		Low number of agents	Statistic	Current		[Startup Group]		
M Rule Sets							2	
Contraction Policy Sets							ി	
13 Schedules							-	
Cage Sets     Anno Sets								
							<b>See</b>	
Timezone Map Data							~	
import/Export Configuration							1	
El (d) Integrations								•
	Auto-save						🔚 Save	🔊 Revert
	, ,						🙎 Admir	nistrator //

3. In the Interaction Dialer > Advanced Interaction Dialer > Policy Sets container, reconfigure Policy Set statistics for your Interaction Dialer configuration.



## Configure Campaigns in a multiple ODS environment

Post-migration, all campaigns distribute across all ODS servers. If you want the same configuration you had in Interaction Dialer 3.0 (for example, Campaign1 on ODS1 and Campaign2 on ODS2), reconfigure these settings manually.

#### To configure campaigns in a multiple ODS environment:

- 1. Open Interaction Administrator
- 2. In the Dialer Settings area of the Interaction Dialer > Campaign > Basic Configuration container, do the following for each campaign:
  - a. Change the Use All Dialing Servers to No (set to Yes by default)
  - b. In the Dialing Servers list box, click the server to use for that particular campaign and then click Add.

Use All Dialing Servers:	NO	
Dialing Servers:	Available items:	Selected items:
	Filter items X	
	400DS_SU1	
Bulk Call API:	OFF	
Call Analysis:	ON 📃 🗹 Detect Answering Machine	
No Answer Timeout:	22 ਦ second(s)	
Call Timeout:	3 🔹 second(s)	
Calling Party Name:		Number: (Digits Only)
Disable Non-Dialer Statistics:	NO	
Copy Dialer Attributes to C	Call Attributes	

#### Configure Time Zone Maps and assign them to campaigns, where applicable

If your contact list includes each contact's time zone, you can use Interaction Dialer's Time Zone Blocking feature to prevent placing calls to those contacts at inappropriate times.

**Note:** In **Interaction Dialer 2.4**, time zone settings did not exist so you need to configure them for existing campaigns. Create the time zones for your contact lists, map the data files, assign time zones to campaigns, and enable the automatically map time zones feature.

#### To verify time zone settings:

**Interaction Dialer 3.0** introduced the time zone feature. Post-migration, best practice recommends that you confirm that the time zone settings migrated correctly.

- 1. Open Interaction Administrator.
- 2. In the Interaction Dialer > Advanced Interaction Dialer > Timezone Map Data container, click Timezone Map Data Settings.
- 3. Select each Timezone Map Data, verify no validation errors exist, and configure a priority, if needed.

📷 TimeZ	oneMappin	g		•
Details	Name: Display Name: Type: Data File: The priori Priority:	TimeZoneMapping TimeZoneMapping Custom MapFiles.txt ty of entries in the Timezone Map Data container w	▼ × ▼ ill affe	✓ Validate → Upload New ect the zone mapping results.
Auto-save				📊 Save 🛛 💥 Cancel

#### To set time zone mappings:

- 1. Open Interaction Administrator.
- 2. In the Interaction Dialer > Campaigns container, click Timezone Settings.
- 3. Select a campaign, click **Basic Configuration**, and under **Timezone Settings**, specify the time zone mappings.

[Campaig	gn Defaults]		•	•
Basic Configuration	Display Name:	[Campaign Defaults]		
Contact List	Workgroup:	No Workgroup selected		
Recall Control	Group:			
Abandons	Scripting			
Skills and ACD	Base Script	No Basescript selected.		
Automation	C Custom Script URL:	Keep script open between calls		
	Dial Sottings			
	Diar Settings			
	Timestere Cettings			
	Zone Set: Automatically map time zo Map phone numbers Map all phone numbers Map all phone numbers Map phone numbers to	No ZoneSet selected.  ones not set to a zone not set to a zone or set ars time zones now	^	

#### Configure DNC Sources and assign them to campaigns, where applicable

A DNC Source provides a list of telephone numbers that campaigns shouldn't dial. Genesys strongly encourages Interaction Dialer customers to scrub contact lists against do-not-call (DNC) lists. Scrubbing prevents campaigns from dialing contact numbers.

**Note:** In **Interaction Dialer 2.4**, DNC sources did not exist so you need to configure them for use in campaigns. Create a DNC source and then assign it to applicable campaigns.

**Interaction Dialer 3.0** introduced the DNC sources feature. Post-migration, best practice recommends that you confirm that the DNC sources migrated correctly.

#### To configure or verify DNC Sources:

- 1. Open Interaction Administrator.
- 2. In the Interaction Dialer > Advanced Interaction Dialer > DNC Sources container, create or verify DNC sources.

🟶 Interaction Administrator - [400DSD_SU2]					- 🗆 🗵
File Edit View Context Help					_ <b>B</b> 🗵
🗟 🖗 🗟 🛍 🕲 🎾 🗟  👘					
Collective Collection	Name Search DNC 3 : DC tails	Display Name: DNC Type: Custom Source Details Connection: Dinc Source in a campaign, Table: Phone Number Column: Database Column to Exclude: Expiration Column:	400DSD_SU2A y to populate the table and column lists below. W the campaign's connection will be used. CALLLIST ADKEY Select phone number column or column to exclude Select a column	<pre>x • hen using this x • x • x • </pre>	
	Auto-save			🔚 Save	🔊 Revert
				📃 🚨 Admi	nistrator //

To assign DNC sources to a campaign:

- 1. Open Interaction Administrator.
- 2. In the Interaction Dialer > Campaigns container, select a campaign, click Basic Configuration, and under Contact List Settings, specify the DNC source criteria.

comgaradon	Dial Settings			
Il Control	Contact List Settings			
ndons	Contact List:	calllist	X ¥	
and ACD	Sort Criteria:	Available items:	Selected items:	
mation		Filter items X ATTEMPTS CELLPHONE FIRSTNAME HOMEPHONE 13_ACTIVECAMPAIGNID 13_ATTEMPTSABANDONED 13_ATTEMPTSABANDONED 13_ATTEMPTSADAILY 13_ATTEMPTSADAILY 13_ATTEMPTSFAX 13_ATTEMPTSFAX	ASC Add Add Add	Move up     ■ Move down
	Filters:	Available items:	Selected items:	
	Filter Callbacks:	□ Agent Scheduled □ Auto-Schedul	Add >	
	Priority Dialing			
	Query frequency:	1	5 🗘 second(s)	
	Sort Criteria:	Available items: Filter items CELLPHONE FIRSTNAME HOMEPHONE 13_ACTIVECAMPAIGNID 13_ATTEMPTSABANDONED 13_ATTEMPTSBUSY 13_ATTEMPTSDAILY	× Add >	The Move up
		I3_ATTEMPTSFAX I3_ATTEMPTSMACHINE I3_ATTEMPTSNOANSWER I3_IDENTITY	Remove	

## Configure maximum calls and maximum call rate

In Interaction Administrator, you can edit Outbound Dialer Server maximum calls and maximum call rate threshold values.

- The Maximum Calls setting defines the global limit on the number of calls Dialer places so that it doesn't use up all available lines or exceed the number of physically available channels. You can set a value ranging from 0 to 2,000,000,000 calls.
- If you are using the Bulk Call API, set the **Maximum Call Rate** to 16 calls per second or more. A high performance bulk call placement API that consumes less system resources while providing higher call throughput.

In **Interaction Dialer 2.4**, the ability to define maximum calls and maximum call rates did not exist so you need to configure them for ODS servers. In **Interaction Dialer 3.0**, you define maximum calls and maximum call rates using server parameters. Post-migration, configure these settings for **Interaction Dialer 2015 R1 or later**.

#### To configure maximum calls and maximum call rate:

- 1. Open Interaction Administrator.
- 2. In the Interaction Dialer > Advanced Interaction Dialer > Global Dialer Settings container, select Outbound Dialing Servers.

Each row in the grid contains the name of an Outbound Dialer Server.

3. Specify the **Maximum Calls** value and the **Maximum Call Rate** for each Outbound Dialer Server using the up or down arrows.

🕞 Interaction Administrator - [400D5_5	U1]		IX
📄 File Edit View Context Help			$\mathbb{P}^{\times}$
Collective Collective documentary documentary documentary constraints constra	Global Dialer S Configure system-wide Dia	r Settings Dialer settings	0
	General	When errors or outages occur, send notifications with this dialing server: 400D5_SU1	]
	Phone Number Types	Outbound Dialer Servers	^
Interaction Analyzer      Interaction Dialer	Outbound Dialing Servers	Name Maximum Calls Maximum Call Rate 💥	
Campaigns	Configuration Change Auditing	400DS_5U1 1500 🗧 10	
Surplus Contact Lists Contact List Filters Global Dialer Settings Database Connections Sill Sets Policy Sets Schedules Stage Sets Con Sets DNC Sources DNC Sources Timezone Map Data Import/Export Configuration Dtegrations	HTTP Server	4	
· ·		📊 Save 🏼 🔊 Re	evert
		Administrator	_ //.

# Configure maximum lines per campaign

The **Max Lines per Campaign** setting controls the maximum number of lines that each Outbound Dialer server can use to conduct the campaign. Each Outbound Dialer server maintains this number of calls concurrently to utilize the maximum number of lines. The maximum value is 2000 lines.

In Interaction Dialer 2.4 and 3.0, this setting was only accessible with an agentless campaign. In Interaction Dialer 2015 R1 or later, you can configure maximum lines for any campaign.

#### To configure maximum lines per campaign:

- 1. Open Interaction Administrator.
- 2. In the Interaction Dialer > Campaigns container, select the campaign to configure and then click Basic Configuration.
- 3. In the **Dialer Settings** group box next to **Max Lines per Campaign**, use the slider or the up and down arrows to set the maximum number of lines each Outbound Dialer server uses to conduct the campaign.

SInteraction Administrator - [400D5_9	501]					
	Name Search	Workgro	up 🔊	Calling Mode <search></search>	Status	4
	[Campaign Defaults]			Predictive	Manual Off	D
Gystem Configuration	campaign1	Support		Predictive	Manual On	î (
Interaction Tracker						×
Interaction Recorder						
🛨 🆏 Interaction Analyzer	campaigr	n1				<b>•</b> –
	-					
Scripts Contact Lists	Status: Manua	al On				
🖃 🥳 Advanced Interaction Dialer	Manual	S     S	Recycle Campaign	📑 Reset Campaign  💩	Run Test	
Contact List Filters						
Database Connections	🕕 Status change will	not take effect until car	mpaign is saved.			
Rule Sets						
As Policy Sets	Basic Configuration	Display Name:	campaign1			
🖉 Stage Sets	Recall Control	Workgroup:	Support		× *	
🔞 Zone Sets 🚳 DNC Sources	Abandons					
Timezone Map Data		Group:				
Import/Export Configuration     Import/Export Configuration	Skills and ACD	Scripting				
	Automation	Base Script	script1		× •	
		C Custom Script URL	.:			
			Keep script oper	n between calls		
		Dial Settings				^
		o lite a Mada	Production .			
		Calling Mode:	Predictive			
		Campaign priority:		<b></b>	50 🗬	
		May Lines ner Campa	ian:		1000 (*)	
		Plax Lines per Campa	iyii.		1000 💌	
		Initial Calls per Agent	: -		3 💌	
		Statistics sample perio	od:		60 second(s)	
						<b>•</b>
	Auto-save					ave 🔊 Revert
						🙎 Administrator

## Specify default settings for Interaction Dialer Manager containers

In Interaction Administrator, several **Interaction Dialer** containers in include an modifiable **[Default Settings]** entry. This entry defines a set of attributes assigned to subsequent new entries. If you edit the [Default Settings] entry and change an attribute, subsequent new entries inherit its settings. Updating the **[Default Settings]** entry does not affect existing entries in any way.

The Interaction Administrator containers that contain a [Default Setting] entry are:

- Campaigns
- Database Connection
- Rule Sets
- Policy Sets
- Stage Sets
- Zone Sets

Post-migration, best practice recommends that you examine the **Interaction Dialer 4.0** default entries and configure them according to in-house preferences.

🕞 Interaction Administrator - [400D5_5U1	]				4	È
📄 File Edit View Context Help						
🔒 🔉 🖹 🖻 🗎 🥵 ≻ 🔒 👘						
🖃 🌮 Interaction Dialer 📃 🔺	Name		Workgroup		Calling Mode 🔍	
Campaigns	Search	>	Search	>	<search></search>	2
Scripts	[Campaign Defaults]				Predictive	7
Contact Lists	[compargn containe]					,
Gostact List Silters						ζ.
	🔲 [Campai	gn Defau	ilts]			Ξ.
	· · ·	-	-			Ъ.
🗑 Skill Sets	Basic Configuration					Γ.
🏁 Rule Sets		Display Nan	ne:	[Campaign Defaults]		5
💩 Policy Sets	Recall Control			Ma Washessun asla	stad A	3
Chedules		workgroup:		No workgroup sele	cieo	<b>r</b>
Stage Sets	Abandons	Groups				>
Zone Sets     DNC Sources		Group.		1		
Timezone Man Data	Skills and ACD	_ Scripting -				$\geq$
Import/Export Configuration	•					-
	Auto-save				<b>/</b>	
		when we have			mound	

# Configure new Interaction Dialer 4. 2015 R1 or later features in Interaction Dialer Manager

#### Review and modify Wrap-up Categories and Codes

In Interaction Dialer 2015 R1 or later, Reason and Finish Codes translate into Wrap-up Categories and Wrap-up Codes. Migrating from Interaction Dialer 2.4/3.0 to Interaction Dialer 2015 R1 or later can inadvertently create an incorrectly wrapped code and thus, invalidate an associated campaign.

#### To review Wrap-up Codes and Wrap-up Categories and reconfigure Policy Sets and Base Scripter Dispositions:

- 1. Open Interaction Administrator.
- 2. Review the Dialer-related Wrap-up Categories in the **People > Wrap-up > Wrap-up Categories** container.

🛞 Interaction Administrator - [400D5_9	501]						1
File Edit View Context Help							
🗣 🔉 💫 🖨 🖆 🚳 🎾 🔒 👘							
🛨 🏇 Collective	Wrap-up Category		Display name		Category label	System	
⊞ 100D5_5U1 - 4.0 5U3	Search	۶	Search	۶	Search	Search	>
Licenses Allocation	<default td="" wrap-up<=""><td>Category&gt;</td><td><default catego<="" td="" wrap-up=""><td>γ&gt;</td><td>Default inbound category</td><td>Yes</td><td></td></default></td></default>	Category>	<default catego<="" td="" wrap-up=""><td>γ&gt;</td><td>Default inbound category</td><td>Yes</td><td></td></default>	γ>	Default inbound category	Yes	
Default User	Ambiguous		Ambiguous		Ambiguous	Yes	
noles	Busy		Busy		Busy	Yes	
	Deleted		Deleted		Deleted	Yes	
Workgroups     Password Policies							
	🧠 < Defa	ult Wran-u	in Category>				-
🥭 Secure Input Forms		and map a	ip category?				
<ul> <li>Wrap-up Categories</li> <li>Wrap-up Codes</li> <li>Client Buttons</li> <li>Client Configuration</li> <li>Queue Columns</li> <li>Client Templates</li> <li>Response Management</li> <li>Skills</li> <li>Access Control Groups</li> <li>System Configuration</li> <li>Interaction Tracker</li> <li>Interaction Recorder</li> <li>Interaction Analyzer</li> <li>Interaction Dialer</li> <li>Integrations</li> </ul>	<b>Configuration</b> Advanced	Category label: Record status: Phone number s The interaction Increment th The interaction Multi-language	Default inbound cate	rson	+		
·							-

3. Review the Dialer-related Wrap-up Codes in the **People > Wrap-up > Wrap-up Codes** container.

Interaction Administrator - [400DS	_5U1]						
File Edit View Context Help							
≩ 📄 🖹 🚳 🎾 🗟 🛔							
🛨 🏇 Collective	Wrap-up Code		Digits	Code label		Category	
	Search	>	Search 👂	Search	۶	Search	>
Licenses Allocation     Seconde	Ambiguous - Agent	Received a New Ca	146	Agent Received a New Call		Ambiguous	
Default User	Busy		135	Busy		Busy	
藝 Roles	Busy - Busy Signal		140	Busy Signal		Busy	
	Busy - Disconnect b	efore Analysis	136	Disconnect before Analysis		Busy	
Password Policies	Busy - Not Reached		139	Not Reached		Busy	
🦉 Schedules							_
🤄 Secure Input Forms 🖃 🍞 Wrap-up	Ambig	uous					
Wrap-up Categories							
🗐 Wrap-up Codes	Configuration	Diaita	188				
Client Baccons     W     Client Configuration		Digits.	100				
Queue Columns	Advanced	Code label:	Ambiguous				
Account Codes Configuration		Category:	Ambiguous			× •	
Response Management						SUT0	
🚀 Skills		Access Control G	roup:			2	
🗑 Access Control Groups		The right part	y was contacted				
		Multi-language	labels				
Interaction Optimizer		Language	Valu	e	4	•	
🗉 🎭 Interaction Analyzer							
					-	•	
							F.

3. Reconfigure policy sets mapped to Reason and Finish Codes to the Wrap-Up Categories and Wrap-Up Codes in the Interaction Dialer > Advanced Interaction Dialer > Policy Sets container.

RINTERACTION Administrator - [400DS_S	U1]						*
📄 File Edit View Context Help							
🔒 🔉 💫 🗈 🗂 🕲 🎾 🔒 📘							
	Name	0					
Licenses Allocation	Search	1					
	[Policyset Defaults]						
🕀 🛷 System Configuration	Locked Policy						
🕀 🔎 Interaction Tracker							E
🕀 🛄 Interaction Recorder							
🕀 📉 Interaction Optimizer				—			
+ 🦦 Interaction Analyzer		Dellar					
	🛯 🕼 Госкес	a Policy					
Scripts							
Contact Lists	PreCall	Display Name:	Locked Policy				
🖃 🦚 Advanced Interaction Dialer		Policy Name		Requirement	Enabled		- T
Contact List Filters	Call Analysis	Time of Day					Ŧ
Global Dialer Settings	<b>D</b>	Time of Day		All			2
Skill Sets	Disposition	Conditions Beha	aviors				×
🕅 Rule Sets		Behavior Name	Behavior Type	Summary		-	
l Policy Sets		Call Back	Disposition	Scheduled-Scheduled - Callback-			1
Chedules						- N	1
Stage Sets						<b>*</b>	
Zone Sets     A     DNC Sources							
Timezone Map Data						1	
A Import/Export Configuration							
🛨 🔊 Integrations							-
•	1						•

4. Modify base Script dispositions mapped to Reason and Finish Codes to the Wrap-Up Categories and Wrap-Up Codes in the Interaction Dialer > Scripts container.

🕞 Interaction Administrator - [400D5_5	iU1]							_ 8 ×	*
File Edit View Context Help								_ <del>8</del> ×	
🔒 🔉 🖹 🛍 🚳 🎾 🔒 📔									
🕀 🏇 Collective	Name							4	
⊞ 100DS_SU1 - 4.0 SU3	Search		۶						
Licenses Allocation	AScript								
+ Susten Configuration	ocrint1							E I	
System Connguration	scipti								
								<b>X</b>	
🗄 💌 Interaction Optimizer								A	
🛨 🖏 Interaction Analyzer	💷 AScrir	ot							
🖃 🌮 Interaction Dialer		-							Ξ
Campaigns	Missellaneous								
Contact Lists	Pliscellaneous		Default Page						
Advanced Interaction Dialer	Pages	Gaman							
🦉 🎾 Contact List Filters		Genera						~	
🕂 Global Dialer Settings	1	Dage C	ontrols					~	
Database Connections	1	ruge et	51101013						
🧭 Skill Sets 🏴 Rule Sets		Page D	ispositions					^	
A Policy Sets		Туре	Wrap-up Category	Label	Wrap-up Code	Abandon	4		
👩 Stage Sets	1	3	Busy	AAA	Busy	Not Abandoned	ST		
🚷 Zone Sets	1	3	Fax	ADC	Fax	Not Abandoned	2		
DNC Sources	1						×		
Timezone Map Data	1						A		
Import/Export Conriguration Integrations	1								
	1								
	1								
									Ŧ

#### Configure the From email field in Policy and Rule actions

In Interaction Dialer 2.4 and 3.0, the Email form in Policy Set behaviors and Rule Set actions did not contain a From field. Genesys added this feature in Interaction Dialer 4.0. During migration, the system populates the From field with the default Do.Not.Reply@inin.com. Post-migration, substitute your own email address in the From field.

#### To configure the From email field:

- 1. Open Interaction Administrator.
- 2. Configure the From email field for Dialer-related Policy Set statistics in the Interaction Dialer > Advanced Interaction Dialer > Policy Sets container.



3. Configure the **From** email field for Dialer-related Rule Set statistics in the **Interaction Dialer > Advanced Interaction Dialer > Rule Sets** container.

🕞 Interaction Administrator - [400D5_	sui]	
File Edit View Context Help		Ð×
🗣 👂 🙀 🖨 🛍 🚳 🎾 🔒 👘		
Collective     400DS_SUI - 4.0 SU3     Licenses Allocation     Some Second	Name       Search       [Ruleset Defaults]       Low Number of Active Agents	
Campaigns		
Scripts Contact Lists Contact Lists Contact Lists Contact List Filters Goldbal Dialer Settings Database Connections	Details         Display Name: Low Number of Active Agents	0
👼 Skill Sets		-
Rule Sets Policy Sets Schedules Stage Sets Conces Timezone Map Data Import/Export Configuration Integrations	Rule Name   Rule Name   Name: Low number of agents     Condition   Actions   Condition   Actions   Croups     Condition     Condition <td>~</td>	~
	L Auto Save 🔊 R	evert

Reassign access and security rights

Post-migration, reassign access and security rights to users.

- Access Control Rights (ACLs) determine whether a user, workgroup or role can view and modify Interaction Dialer campaigns and Supervisor views. To log on to and access campaigns, agents need view and modify rights to Campaigns access.
- Security rights manage the functionality that client applications offer, including the ability to modify or view settings through an application. Access to Interaction Administrator or IC Business Manager applications requires security rights.

#### To reassign access:

- 1. Open Interaction Administrator.
- 2. Open a user, role, or workgroup configuration record.
- 3. Click the Security tab and then click Access Control. The Access Control dialog box appears.

Access Control		
Category: Interaction Dialer	•	Search: Clear
Name	View Modify	Inherited From
*[All] [Default Campaign] campaign1		Supervisor
*[All] Classic Dialer Supervisor views Dialer Overview		Supervisor
Advanced Access Details		Close

- 4. In the Category list box, click Interaction Dialer.
- 5. Select the View and Modify check boxes for the campaigns to assign to a user, role, or workgroup.

#### To reassign security rights:

- 1. Open Interaction Administrator.
- 2. Open a user, role, or workgroup configuration record.
- 3. Click Security Rights. The Administrator Access Rights dialog box appears.

ecurity Rights		
Category: Application	Search:	Cle
Show only colorited items and groups	_	,,, _,, _
Show only selected items and groups		
Name	Has Right Inherited From	
Interaction Dialer		
Logon Campaign	Magent 🗹	
Modify Configuration General		
Modify Preview Call Behavior		
View Configuration General		
View Preview Call Behavior		
View/Modify Contact List Data Query		
Interaction Dialer - Campaigns		
View/Modify Agentless Calling Type		
View/Modify Automatic Time Zone Ma		
View/Modify Line Settings		
View/Modify Maximum Lines		
View/Modify Status		
Interaction Dialer - Global Dialer	Settings	
Modify Change Auditing		
Modify HTTP Server		
Modify Outbound Dialer Servers		
Modify Phone Number Types		
View Change Auditing		
View HTTP Server		
View Outbound Dialer Servers		
View/Modify Data Conceptions	H	
View/Modify DNC Sources	H	
View/Modify Time Zone Man Data		
Newphodity Time Zone Map Data		
Interaction Dialer - Policy/Rule 9	ts:	
View/Modify Custom Handler Actions		
View/Modify Event Log		
•		
Advanced Access Details		
		Close

- 4. In the **Category** list box, click **Applications** and then use the scroll bar to locate **Interaction Dialer** rights.
- 5. Select the check box for each security right to grant the user, role, or workgroup.

## Assign a configurable priority number to campaigns for multiple campaigns

In Interaction Dialer 2015 R1 or later, you can assign priority to specific campaigns. The system places more calls per agent for higher priority campaigns. By default, this number is set to 50.

#### To change the priority number for a campaign:

- 1. Open Interaction Administrator.
- 2. In the Interaction Dialer >Campaigns container, select a campaign and in the Basic Configuration area.
- 3. In the **Campaign Priority** area under **Dial Settings**, use the slider bar or the up and down arrows to select the priority number for this campaign.

[Campaig	n Defaults]	<u>.</u>
Basic Configuration	Display Name:	[Campaign Defaults]
Contact List	Workgroup:	No Workgroup selected
Recall Control	Group:	
Abandons	Scripting	
Skills and ACD	Base Script	No Basescript selected.
Automation	C Custom Script URL:	
, atomation		L Keep script open between calls
	Dial Settings	
	Calling Mode:	Predictive
	Enable preview countdown:	20 🗘 second(s)
	Campaign priority:	<u>50 (*</u>
	Max Lines per Campaign:	1000 🕆
	Initial Calls per Agent:	3*
	Statistics sample period:	60 🖕 second(s)
	Dial Line Information	
	C Dial Plan	
	Location: [None]	X ¥
	C Line Group	
	Line Group: No Line	Group selected.

# Modify custom scripts for changes in Dialer 2015 R1 or later

Custom Interaction Scripter scripts don't migrate and require a developer to modify the following:

- Replace references to workflows with campaign objects.
- Remove transitions between campaigns in a workflow.
- Modify scripts that set a reason code to set a wrap-up code instead.
- Modify disposition scripts that set finish codes to assign a wrap-up category code.

For more information on modifying custom scripts, see the <u>Interaction Scripter Developer's Guide</u> in the <u>PureConnect</u> <u>Documentation Library</u>.

# Recreate Supervisor alerts for Dialer statistics in IC Business Manager (Interaction Supervisor)

Interaction Supervisor alerts set up for Interaction Dialer statistics don't migrate and need recreating. Post-migration, recreate Interaction Dialer statistics alerts in IC Business Manager > Interaction Supervisor.

Note: Do not recreate these alerts until after you:

To recreate Interaction Supervisor alerts for Interaction Dialer statistics:

- 1. Migrate the CIC/Interaction Dialer 3.0 client workstations to the CIC/ Interaction Dialer 2015 R1 or later client workstations.
- 2. Install the Dialer 2015 R1 or later plug-in for IC Business Manager on client workstations.
- 3. Create Interaction Dialer statistics alerts. For more information about creating Interaction Dialer statistics alerts, see the *Interaction Supervisor* documentation in the <u>PureConnect Documentation Library</u>.

# Migrate CIC 2.4/3.0 Handlers

CIC base handlers change substantially in each release. Before importing CIC configuration data with Interaction Migrator, *inventory each modified base handler*. After importing CIC configuration data, *modify and publish the base handlers* on the new CIC server. Interaction Migrator does not publish or manage custom handlers. Interaction Migrator places the handlers from the export into the designated extraction folder. *Publish and manage custom handlers post-migration* manually.

Interaction Dialer: The procedures for migrating Interaction Dialer handlers are the same as for migrating CIC handlers.

# Complete handler pre-migration procedures

When you are preparing to export CIC 2.4/3.0 configuration data, complete the handler pre-migration procedures described in this section.

# **General methodology**

While the migration updates many parts of the system for you, you need to carry forward all handler modifications manually. The best practice is to use the following phased approach:

- 1. **Inventory** Inventory all the modified handlers on the server and classify them as either modified base handlers or custom handlers. Modified base handlers are handlers released with the CIC product that you changed. Custom handlers are handlers that you wrote on your own.
- 2. **Identify** Identify all the places that contain modified base handlers. Internal documentation following established best practices available on the PureConnect Customer Care website makes this process easier. If you're having difficultly determining these changes, remember to make those notations more clearly when you remake the changes to the CIC 2015 R1 or later handlers.
- 3. Understand Ensure that you understand why you changed the base handlers or what the function of a custom handler is.
- 4. **Minimize** Once you have your list of reasons/changes for modifications, view the feature set added to the new CIC 2015 R1 or later software. It's possible that feature additions such as Interaction Attendant enhancements reduce the list of your handler customizations to carry forward. Maximize your use of Interaction Attendant to minimize future migration efforts.
- 5. **Re-engineer** Now that you have your list of modifications to make, recreate those customizations using the new CIC 2015 R1 or later base handler as your building point. Always maximize your use of customization points and encapsulate your changes into subroutines. Reuse custom handlers and subroutine calls when possible.

Complete all these steps as part of your pre-migration procedures using a development environment whenever possible, and then test in that development environment. This process minimizes the chances that your testing on the production servers reveals problems, and ensures a smoother migration.

# Plan for base handler modifications

Modified base handlers are handlers released with the product that you then modified.

#### Important!

- CIC 2.4 to 4.0 migrations. Genesys recommends that you review the relevant feature sets in CIC 3.0 and CIC 4.0, delete duplicate work, and add customization points as needed.
- CIC 3.0 to 2015 R1 or later migrations. Genesys recommends that you review the relevant feature sets in CIC 2015 R1 or later, delete duplicate work, and add customization points as needed.

Inventory each CIC 2.4 or CIC 3.0 base handler that you modified from the released version. If you followed good handler writing practices, you documented the step changes you made to each base handler. You also tried to minimize the impact to the released handlers by compartmentalizing your changes into subroutines.

Create a call flow and redesign the modifications for CIC 2015 R1 or later base handlers. For each modified handler, list your modifications and decide the best way to add this functionality to the equivalent CIC 4.0 base handler. If you added a feature to a CIC 2.4 or CIC 3.0 base handler that is now a base feature in CIC 2015 R1 or later, don't carry over these changes.

Take the time to make your changes as clear and efficient as possible. It saves you time in future migrations or upgrades. Have these changes available before beginning the migration.

After you redesign your handler modifications, make a copy of each equivalent released handler in CIC 2015 R1 or later and save it to a custom directory. Rewrite your modifications into the handler and publish it.

You do not back up, open, and publish the CIC 2.4 or CIC 3.0 modified base handlers. Instead, you modify the equivalent CIC 2015 R1 or later released handlers.

# Plan for and back up handler customizations

Custom handlers are handlers that you wrote on your own. Determine the custom handlers to upgrade and back them up.

#### To back up handler customizations:

- 1. On the CIC 2.4 or CIC 3.0 server, navigate to \I3\CIC\Handlers\Custom.
- 2. Copy the custom handlers to upgrade to any location on or accessible from the CIC server, for example, \Backup Files\Handlers\Custom.

# Determine which handlers have changed

After you back up the CIC 2.4 or CIC 3.0 custom handlers and install CIC 2015 R1 or later on the CIC 2015 R1 or later server, run the Handler Diff tool in Interaction Designer. The tool indicates what changed between the CIC 3.0 custom handlers and their corresponding CIC 2015 R1 or later handlers.

The Handler Diff tool outputs to an XML file that lists the differences between the two sets of handlers. Optionally, you can specify an XSL file that customizes the display of the resulting diff XML file into a more readable form.

#### To run the Handler Diff tool:

- 1. Close all open handlers in Interaction Designer.
- 2. From the Utilities menu, click Power Tools and then click Handler Diff. The Handler Diff dialog box appears.
- 3. Under "Old" Handler List, click Browse and then specify the folder that contains the set of the original handlers to use. After you select the folder, the Handler Diff tool populates the Old list with the .ihd files found in that folder.
- 4. Under "New" Handler List, click Browse and then specify the folder that contains the set of the original handlers to compare with the Old Handler List.
- Clear the check box for any handlers that you do not want to process. Each list has a check box that checks only those handlers that exist in the other list. The check boxes are: Check only handlers that are checked in "New" list and Check only handlers that are checked in "Old" list.
- 6. On the Diffs to Perform tab in the lower portion of the dialog box, clear the check box for any diffs that you do not want to do. This tab lists all the handler attributes that you can compare. When you click a diff, a description of that diff appears in the Diff description portion of the dialog box. Click Check All Diffs to select all diffs at once.
- 7. To change the location of the output diff XML file, click the **Output Location** tab. Click **Pick output XML file** and specify where to write the diff output XML file.
- 8. To customize the output with an XSL file, click the **Output Formatting** tab, select **Add XSL stylesheet to customize handler diff XML output**, and then select the appropriate .XSL file from the list.

GeneralHandlerDiffOverview.xsl is a sample, non-localized file installed in \CIC\Server\HandlerDiff\XSLFiles that gives an example of how you can use an XSL file to customize the output. If you decide to use an XSL file to customize the output, the location of the style sheet writes directly into the diff results XML file with a "<?xml-stylesheet" processing instruction at the top. If you give the output XML file to another user, ensure that the XSL file exists where specified in the XML file so that the output displays correctly.

9. Click Run Handler Diff to start the comparison.

When the diff operation completes, the diff tool opens Internet Explorer to display the resulting XML file. If you specified an XSL sheet to use to customize the output, when Internet Explorer opens the file, you might see an error message. The message is, "To help protect your security, Internet Explorer has restricted this file from showing active content that could access your computer. Click here for options..." If this message appears, click the message and then click **Allow Blocked Content** to display the information.

- 10. Click a handler name in the left column to display the diff results for that handler in the right column.
- 11. Once you determine the differences, replace any toolsteps that changed, compare the inputs and outputs, and publish them. For instructions, see <u>Handler post-migration procedures</u>.

# Back up most recently published handlers

It is good practice to make a backup directory of the most recently published version of every handler published on the system.

#### To back up most recently published handlers:

- 1. On the CIC 2.4 or CIC 3.0 server, navigate to  $\I3\CIC\Server\Handlers.$
- 2. Copy the \*.ihd files from this directory to a backup directory, for example, \Backup Files\Handlers\Running Handlers. This directory is your backup directory and contains a copy of the most recently published version of every handler published on this system.

If (after opening, publishing, and modifying the handlers that you migrated), you are missing some functionality from the old version, double-check your work against the handlers in this backup directory.

# Complete handler post-migration procedures

After you import CIC 2.4/3.0 configuration data, complete the handler post-migration procedures described in this section. You need a plan for these procedures, as described in <u>Handler pre-migration procedures</u>.

# Open and publish custom-written handlers

#### To open and publish custom-written handlers:

- 1. Create the directory  $\I3\CIC\Handlers\Custom\ToBeMigrated.$
- 2. If you completed a new CIC 2015 R1 or later installation directly on the CIC server, you should have already copied all handlers in the \I3\CIC\Handler\Custom directory to a backup location. Leave the handlers in the backup location untouched as your record to refer to in the event of a problem. Move all the handlers in the \I3\CIC\Handlers\Custom to the \I3\CIC\Handlers\Custom\ToBeMigrated directory.
- 3. Migrate each handler one at a time. For each handler that is custom (a user-created handler/subroutine not based on any base handler), move the handler from the \ToBeMigrated directory to the parent \Custom directory.
- 4. Resolve as many toolstep changes as possible before publishing:
  - Open the handler in Interaction Designer. Note any gray (missing icon) steps, which indicate a toolstep changed.
  - Drop the new version of the toolstep out of the tool palette and integrate it into the handler in place of the old step. Carefully carry over the old parameters, and note parameters to add or remove.
  - Use the Dependency Viewer to identify deprecated tools. In Interaction Designer, choose Utilities....View Dependencies... from the menu. In the Dependency list box, click Tools in Handlers. Choose to group by supporting handler. Look for tools listing in this format: Tool Category:ToolName, for example: ExchangeTools:SendEmail. These tools work correctly but you need to update them to new tools eventually.
  - If using a tool that requires the email address, look up the EmailAddress attribute instead of the Mailbox attribute and pass the EmailAddress value into the tool.
- 5. Save and Publish the newly migrated CIC 2015 R1 or later handler. During the publishing process, if a tool's parameters, exit paths, or both changed since the previous release, an error message appears. The message displays the tool's Step Label and Node ID, and attempts to explain the problem.

If an error occurs, change the affected tool in Interaction Designer to publish the handlers successfully:

- Use the Step Label, Node ID, and error message text to locate the step and diagnose the problem.
- Change the tool as necessary to solve the problem. For example, create a variable to contain the value of the parameter, or create a link from the new exit path.
- Save the handler and try publishing again.

If you are still unable to solve the problem, contact PureConnect Customer Care.

6. Repeat steps 3 through 5 until you publish all custom handlers.

# Modify and publish CIC 2015 R1 or later base handlers (including customization points)

Modify the appropriate CIC 2015 R1 or later shipping handlers based on your modifications to CIC 2.4 or CIC 3.0 handlers.

#### To modify CIC 2015 R1 or later base handlers:

- 1. *To prevent overwriting* the CIC 4.0 base handlers, locate the \I3\CIC\Handlers\30Handlers directory, and set the **Read Only** file attribute on the handlers in this directory.
- 2. Migrate each handler one at a time. For each handler remaining in the \I3\CIC\Handlers\Custom\ToBeMigrated directory, locate the handlers in the \I3\CIC\Handlers\40Handlers directory that corresponds to it. Copy the CIC 2015 R1 or later version of the handler to \I3\CIC\Handlers\Custom.
- 3. Open the handler you just copied to the \Custom directory and the matching version in the \ToBeMigrated folder in Interaction Designer. *Rewrite your modifications* to the CIC 2.4 or CIC 3.0 version into the CIC 2015 R1 or later version. You should have already determined your plan for the modifications, as described in <u>Handler pre-upgrade procedures</u>. If you are missing functionality from the CIC 2.4 or CIC 3.0 version, double-check your work against the handlers in the most recently published handler backup directory in \Backup Files\Handlers\Running Handlers.
- 4. *Resolve* as many *toolstep changes* as possible before publishing *each* of the custom handlers in \I3\CIC\Handlers:
  - Open the handler in Interaction Designer. Note any gray (missing icon) steps, which indicate a toolstep changed.
  - Drop the new version of the toolstep out of the tool palette and integrate it into the handler in place of the old step. Carefully carry over the old parameters, and note parameters to add or remove.
  - Use the Dependency Viewer to identify deprecated tools. In interaction Designer, choose Utilities...View Dependencies... from the menu. In the Dependency list box, click Tools in Handlers. Choose to group by supporting handler. Look for tools listing in this format: Tool Category:ToolName, for example: ExchangeTools:SendEmail. Though the tools work correctly, you need to update to new tools eventually.
  - If using a tool that requires the e-mail address, look up the EmailAddress attribute instead of the Mailbox attribute and pass the EmailAddress value into the tool.
- 5. Save and Publish the newly modified CIC 2015 R1 or later base handler in the \Custom folder (which is where you opened it from). During the publishing process, if a tool's parameters, exit paths, or both changed since the previous release, an error message appears. The message displays the tool's Step Label and Node ID, and attempts to explain the problem.

If an error occurs, change the affected tool in Interaction Designer to publish the handlers successfully:

- Use the Step Label, Node ID, and error message text to locate the step and diagnose the problem.
- Change the tool as necessary to solve the problem. For example, create a variable to contain the value of the parameter, or create a link from the new exit path.
- Save the handler and try publishing again.

If you are still unable to solve the problem, contact PureConnect Customer Care.

6. Delete the copy in the \ToBeMigrated folder.

# **Migrate CIC 3.0 Managed IP Phones**

This section describes the migration of managed IP phones from a CIC 3.0 server environment to a CIC 2015 R1 or later server environment. You can configure the managed IP phones either manually or programmatically using a DHCP custom option, DNS Host (A) record, or the IP address of the CIC 2015 R1 or later server. For more information, see the <u>CIC Managed IP Phones</u> <u>Administrator's Guide</u> in the <u>PureConnect Documentation Library</u>.

# Support for migrating CIC 3.0 managed IP phone types to CIC 2015 R1 or later

The migration package supports migrating CIC 3.0 managed IP phones from a CIC 3.0 system to a CIC 2015 R1 or later system.

Of the three managed IP phone types:

- Genesys tested and documented the migration of CIC 3.0 managed Polycom phones to CIC 2015 R1 or later for the current release of the migration package.
- Genesys plans to test and document the migration of CIC 3.0 managed Interaction SIP Station and SIP Soft Phones to CIC 2015 R1 or later in a future migration package release.

# **Recommendations for non-managed IP phones**

If you are a CIC 2.4 site or a CIC 3.0 site with non-managed IP phones, review the recommendations in this section.

# Recommendations for IP phone models supported in CIC 2015 R1 or later

If Genesys supports your IP phone model (s) as a managed IP phone in CIC 2015 R1 or later, Genesys recommends *converting to or creating managed IP phones*. Check the Testlab site at <u>http://testlab.genesys.com</u> to determine whether Genesys supports your IP phone model(s) as a managed IP phone in CIC 2015 R1 or later.

#### Convert existing non-managed IP phones to managed IP phones

For CIC 3.0 sites, follow the procedures in "Create managed IP phones from existing (Polycom) SIP stations" in the CIC Managed IP Phones Administrator's Guide in the CIC 3.0 Documentation Library that is available on your CIC server. Completing this step well in advance of the CIC 2015 R1 or later migration process helps to simplify the scope of the migration effort.

For CIC 2.4 sites, convert your phones to managed phones after you import them into CIC 2015 R1 or later as part of the migration. See "Create managed IP phones from existing (Polycom) SIP stations" in the <u>CIC Managed IP Phones Administrator's Guide</u> in the <u>PureConnect Documentation Library</u>.

#### **Create managed IP phones**

Create Managed IP Phones in CIC 2015 R1 or later following the procedures in "Create multiple managed IP phones" in the <u>CIC</u> <u>Managed IP Phones Administrator's Guide</u> in the <u>PureConnect Documentation Library</u>. Then, point the phones to the new CIC 2015 R1 or later server. For assistance, contact PureConnect Customer Care.

### Recommendations for unsupported IP phone models or to continue using non-managed IP phones

If Genesys doesn't support your IP Phone model as a managed phone in CIC 2015 R1 or later, or you want to continue using a supported phone as a non-managed phone, Genesys recommends that you verify your firmware version manually and update your TFTP/FTP/HTTP server with the appropriate firmware version for your devices.

For devices certified for use with CIC, you can obtain the newest supported firmware from the Testlab site at <u>http://testlab.genesys.com</u>. For non-certified devices, contact your vendor.

# Identify imported managed IP phones

During the import of your managed IP phones, Interaction Migrator appends **\_migrated** to the name of a registration group. This name change helps you identify an imported registration group in the Managed IP Phones container in Interaction Administrator.

# Polycom firmware requirements

CIC requires a minimum Polycom firmware version that the Provision Server communicates with to manage stations. Ensure that your Polycom phones are running the appropriate firmware:

- Polycom IP300 and IP500 phones: Version 2.1.3 or higher.
- All other Polycom phones: Version 3.0.3B (ideally, version 3.1.2) or higher.

**Note:** If you are using managed IP Phones in CIC 3.0, you should be on the correct firmware, as each CIC 3.0 Service Update includes the firmware.

Verify that your phones are running the correct version. The version for each phone is in the **Software Version** column in the **Managed IP Phones** container in Interaction Administrator. In the **Managed IP Phones** container in Interaction Administrator, verify that you meet the minimum firmware version by checking the **Phone** and **Software Version** columns.

🏶 Interaction Administrator - [clientlab]				_ [	IX
Eile Edit View Context Help					2×
🕞 👂 😿 🖻 🛍 🛞 🎾 🔒					
🖃 🍘 Managed IP Phones 🔺	IP Phone Name	Status	Phone	Software Version	Addi
Templates	SIP1	Not provi	Polycom IP500	2.1.3	_
Ring Sets					
Default IP Phone					
Audio Sources     Server Parameters					
Structured Parameters					-
🕀 🔘 Regionalization					
Elicenses Allocation					
System Configuration			1		
Report Logs					
Accumulators					
Historical Reporting					
System Parameters	<b> </b> •	J			
SIP1 saved.				Items:	1 //.

If your Polycom firmware is not on the minimum version and you need help upgrading your Polycom firmware, contact PureConnect Customer Care.

# Supported Polycom phone models and firmware

For more information about:

- Supported Polycom phone models and firmware, see the Testlab site at http://testlab.genesys.com/.
- Polycom model and firmware limitations, see "Additional configuration (Polycom)" in the <u>CIC Managed IP Phones</u> <u>Administrator's Guide</u> in the <u>PureConnect Documentation Library</u>.

# Options for pointing 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): This option offers the most flexibility and allows you to point phones to different CIC 2015 R1 or later servers.
- DNS Host (A) record: This option is simpler to do than the DHCP custom option; however, it is a global change that affects all phones at once.
- Manual configuration: This option is useful for configuring individual test phones; however, it is not a practical option for full deployment of your managed IP phones.

Though Genesys recommends using the DHCP custom option, determine the method that best suits your situation.

# Point the phones to the CIC 2015 R1 or later server

Complete the appropriate procedure to point the phones to the CIC 2015 R1 or later server.

#### Important!

Ensure that you complete the procedure only for the phones that you are ready to move.

# Create a DHCP custom option (recommended)

Complete these steps to use a DHCP custom option to point the phones to the CIC 2015 R1 or later server.

#### To create a DHCP custom option:

- Create a DHCP option in the custom range (225 for example), and set it up just like an option 160, but point it to the CIC 4.0 servers. For more information, see "Configure the network for managed IP phones" in the <u>CIC Managed IP Phones</u> <u>Administrator's Guide</u> in the <u>PureConnect Documentation Library</u>.
- 2. To move the Polycom phones on the CIC 3.0 server to the CIC 2015 R1 or later server, do the following:
  - a. Create a text file called push40.cfg as an example and place it in the \i3\ic\provision\polycom directory on the CIC 3.0 server.
  - b. Place the following in the file, changing 225 to whatever value that you used in DHCP:

```
<device
device.set="1"
device.dhcp.bootSrvOpt="225"
device.dhcp.bootSrvOpt.set="1"
device.prov.tagSerialNo="1"
device.prov.tagSerialNo.set="1">
</device>
```

This command tells the phone to set a new value (write it to flash), the value to set, what to set it to, and to commit that value.

- c. Set the phones to move to the new server to use this value. Set a custom configuration file parameter in IA on the 3.0 server that points to this file called config\_files, and point it to the file you created previously. For more information, see "Additional configuration (Polycom)" in the <u>CIC Managed IP Phones Administrator's Guide</u> in the <u>PureConnect</u> <u>Documentation Library</u>. You can set this value on multiple phones at the same time using multi-select to select several phones in the Interaction Administrator Managed Phones container, and then right-clicking. CIC 3.0 SU 12 introduced this feature. You can modify multiple phones at the same time.
- d. Trigger the configured phones to reload. The phones load the configuration, and change the settings to the new DHCP option, and get their information from there instead.

For more information about moving Polycom phones, see "Additional configuration (Polycom)" in the <u>CIC Managed IP</u> <u>Phones Administrator's Guide</u> in the <u>PureConnect Documentation Library</u>.

- 3. To revert the Polycom phones to the CIC 3.0 server, do the following:
  - a. Remove the config\_files from the phones on the CIC 3.0 server, then either change back the option on the phones, or set up a pushbackto30.cfg file on the CIC 2015 R1 or later server and restart the phones. You construct this file similarly to the one created to merge the phone to the CIC 2015 R1 or later server. The pushbackto30.cfg file is just like the push40.cfg file you created in step 2a, except you use option 160 instead of option 225.
  - b. Create a text file called <code>pushbackto30.cfg</code> as an example and place it in the <code>\i3\ic\provision\polycom</code> directory on the CIC 2015 R1 or later server.
  - c. Place the following in the file to set the phones back to option 160, or whatever value you were using:

```
<device
device.set="1"
device.dhcp.bootSrvOpt="160"
device.dhcp.bootSrvOpt.set="1" >
</device>
```

This command tells the phone to set a new value (write it to flash), the value to set, what to set it to, and to commit that value.

- d. Set the phones you want to move back to the old server to use this value. Set a custom configuration file parameter in Interaction Administrator on the CIC 4.0 server that points to this file called config\_files, and point it to the file you created previously.
- e. Trigger the configured phones to reload. The phones load the configuration, and change the settings to the new DHCP option, and get their information from there instead.

- 4. For the Interaction SIP Station device, to move the phones on the CIC 3.0 server to the CIC 2015 R1 or later server, do the following:
  - a. Change the phones in Interaction Administrator one at a time or in bulk and set the DHCP option value under Advanced Options to the value you want to use.
  - b. Trigger the configured phones to reload. The phones load the configuration, and change the settings to the new DHCP option, and get their information from there instead.

For more information about the Interaction SIP Station device, see "Additional configuration (Interaction SIP Station)" in the <u>CIC Managed IP Phones Administrator's Guide</u> in the <u>PureConnect Documentation Library</u>.

- 5. To revert the phones back to the CIC 3.0 server, do the following:
  - a. Change the DHCP option parameter on both the CIC 3.0 and CIC 2015 R1 or later servers.
  - b. Restart the phones. The phones load the configuration, and change the settings back to the old DHCP option, and get their information from there instead.

#### Notes:

- After you complete your migration, change the DHCP option 160 to point to the CIC 2015 R1 or later server. Phones that don't exist on the CIC 3.0 server's configuration go to the right location out of the box.
- To add (deploy) Polycom handsets during this transition time, the simplest method is to change the phone locally to the new option value. To deploy multiple phones, you can deploy a TFTP server in a staging environment and use a global (00000000000.cfg) file to set phones before deploying them to the desktop. For assistance, contact PureConnect Customer Care.

# Create a DNS Host (A) record

Complete the following standard procedures to use a DNS Host (A) record to point to the CIC 2015 R1 or later server, as described in "Configure the network for managed IP phones" in the <u>CIC Managed IP Phones Administrator's Guide</u> in the <u>PureConnect</u> <u>Documentation Library</u>:

- Create DNS Host (A) records for servers in the DNS voice domain
- Create DNS Host (A) records for Switchover (Polycom and ISS)

#### **Configure managed IP phones manually**

To change the settings on your managed IP phones manually, create a second DHCP custom option or create a second DNS Host (A) record.

#### Create a second DHCP custom option

#### To create a second DHCP custom option:

- 1. Create a second DHCP custom option or change the existing DHCP custom option on the DHCP server, as described in <u>Create</u> <u>a DHCP custom option</u>.
- 2. For each managed IP phone, do the following:
  - a. On the phone, select Menu > Settings > Advanced.
  - b. In the Password box, type 456 and select Enter.
  - c. Select Admin Settings > Network Configuration > DHCP Menu.
  - d. Ensure that Boot Server is set to Custom + Opt. 66 or Custom.
  - e. Ensure that **BootSrv Opt** is set to the number specified for the DHCP custom option.

Note: You set this number when you created the DHCP custom option.

f. Ensure that BootSrv Type matches the type specified for the DHCP custom option.

# Create a second DNS Host (A) record

#### To create a second DNS Host (A) record:

- 1. Create a second DNS Host (A) record or change the existing DNS Host (A) record, as described in <u>Create a DNS Host (A)</u> record.
- 2. For each managed IP phone, do the following:
  - a. On the phone, select Menu > Settings > Advanced.
  - b. In the Password box, type 456 and select Enter.
  - c. Select Admin Settings > Network Configuration > Server Menu.
  - d. Change Server Type to HTTP.
  - e. Change **Server Address** to the FQDN of the Host (A) record associated to the CIC 4.0 server (for example, http://provision40.example.com:8088).

# **Migrate Interaction Media Server 3.0**

This section describes the options and procedures for migrating Interaction Media Server 3.0 configuration data to Interaction Media Server 4.0.

# Review Interaction Media Server 3.0 to 2015 R1 or later migration options

Interaction Media Server 3.0 is not compatible with CIC 4.0. You need to upgrade existing Interaction Media Servers to Interaction Media Server 2015 R1 or later.

The current 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 3.0 appliance used as Interaction Media Server upgraded to 4.02015 R1 or later

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

# New Interaction Media Server 2015 R1 or later appliance

In this scenario, you install the Interaction Media Server 4.0 software on one of the following:

- An Interaction Media Server 2015 R1 or later appliance purchased from Genesys
- Certified hardware that meets the minimum requirements for Interactive Media Server 2015 R1 or later

One advantage to installing a new Interaction Media Server 2015 R1 or later is the ability to test the Interaction Media Server 2015 R1 or later while the Interaction Media Server 3.0 is running in production. However, you must still be running CIC 3.0 in production along with the Interaction Media Server 3.0 because CIC 2015 R1 or later is not compatible with Interaction Media Server 3.0.

# Existing Interaction Media Server G6 3.0 appliance upgraded to 2015 R1 or later scenario

In this scenario, you upgrade an existing Interaction Media Server 120 G6 or Interaction Media Server 160 G6 3.0 appliance to 2015 R1 or later using the MSSP Upgrade Kit. You can obtain the appropriate upgrade kit (small MSSP 4.0 Upgrade Kit for 120 G6 servers) and Medium MSSP 4.0 Upgrade Kit for 160 G6 servers) from your partner, or online at <a href="https://order.inin.com/Start.asp">https://order.inin.com/Start.asp</a>. After you complete the upgrade kit instructions, the server is running Windows 2008 R2 Telecom edition with Interaction Media Server 2015 R1 or later.

When you turn an existing Interaction Media Server 3.0 into an Interaction Media Server 2015 R1 or later, plan one to two hours of downtime to upgrade the operating system and move files.

# Existing Interaction Application Server (IAS) G7 or CIC Server G7 3.0 appliance used as Interaction Media Server upgraded to 2015 R1 or later

In this scenario, you upgrade an existing (IAS) or CIC Server G7 3.0 appliance used as Interaction Media Server to 2015 R1 or later with an internal USB key following the steps in the *Factory Image Restoration Procedures Technical Reference*. After you complete the Factory Image Restoration procedures, the server is running Windows 2008 R2 Telecom edition with Interaction Media Server 2015 R1 or later.

When you turn an existing Interaction Media Server 3.0 into an Interaction Media Server 2015 R1 or later, plan one to two hours of downtime to upgrade the operating system and move files.

# Interaction Media Server 2.4 considerations

Existing Interaction Media Server G5 and G6 2.4 appliances meet the minimum hardware requirements to support Interaction Media Server 4.0. 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 currently available is to wipe the server clean and follow the procedures outlined in the <u>Interaction Media</u> <u>Server Technical Reference</u> in the <u>PureConnect Documentation Library</u> to install a new *software only* media server, including reconfiguring the server manually.

# Before you begin the migration

Before you begin the migration, complete the Interaction Media Server migration requirements:

- Establish an inventory of the software installed on Interaction Media Server 3.0 and determine which software it uses currently, including Interaction Media Server, Interaction SIP Proxy, Interaction Recorder Remote Content Server, and off-server Session Manager.
- Obtain upgraded 4.0 license(s) for any PureConnect products installed on Interaction Media Server 3.0 as described in <u>Migration</u> <u>Planning</u>.
- Interaction Media Server G6 only: Obtain the upgrade kit from Genesys and locate the Upgrade Kit Instructions. The upgrade kit includes a new USB key and a license for Windows 2008 R2 Telecom edition.

Note: You can obtain the appropriate upgrade kit (Small MSSP 4.0 Upgrade Kit for 120 G6 servers and Medium MSSP 4.0 Upgrade Kit for 160 G6 servers) from your partner, or online at <a href="https://order.inin.com/Start.aspx">https://order.inin.com/Start.aspx</a>.

- Interaction Media Server G6, Interaction Application Server G7, or CIC G7 Server only: Obtain the <u>Factory Image Restoration</u> <u>Procedures Technical Reference</u>.
- Determine the computer name to use when the server is running Interaction Media Server 2015 R1 or later. To simplify the migration process, use the same name that the computer had when running Interaction Media Server 3.0. To change the name, follow the procedure for generating new certificates in <u>Complete post-migration procedures</u>.

# 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.

Install Interaction Migrator on Interaction Media Server 3.0 as described in <u>Interaction Migrator Installation</u>. Ensure that you install the appropriate version of Interaction Migrator as described in <u>Install Interaction Migrator</u> and <u>https://my.inin.com/products/cic/Pages/Migrations.aspx</u>.

# Export Interaction Media Server 3.0 configuration data

This section describes exporting Interaction Media Server 3.0 configuration data using Interaction Migrator 2015 R1 or later. Use Interaction Migrator to export the Interaction Media Server 3.0 configuration. Save the exported data to an external location.

Note: Ensure that the export file name contains the name of your Interaction Media Server.

#### To export Interaction Media Server 3.0 configuration data:

- 1. Start Interaction Migrator 4.0 on the Interaction Media Server 3.0, either from the Interaction Migrator link on the desktop, or from Start -> Programs -> PureConnect -> Interaction Migrator.
- 2. On the Welcome page, click Next.

Ð	Interaction Migrator
	Welcome to Interaction Migrator for CIC
ooo	The Interaction Migrator is a wizard-based tool that exports and imports configuration data related to the CIC Server, Interaction Media Server, and other components of the Customer Interaction Center. Interaction Migrator is version independent. It can be used as part of a migration from one CIC release to another, or for recovery and version control. To continue, click Next.
<mark>ଟ୍ଟ</mark> GENESYS <sup>-</sup>	<mark>Zip and Email Logs,</mark> Build 0.0.0.0
	< <u>B</u> ack <u>N</u> ext > <u>C</u> ancel

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

3. On the Task Selection page, click Export configuration data and then click Next.

0	Interaction Migrator	×
Genesys Interaction	on Migrator	00°
	Which task would you like to perform?	
	<ul> <li>Import configuration data</li> <li>Export configuration data</li> </ul>	
	< <u>B</u> ack <u>N</u> ext >	<u>C</u> ancel

4. On the **Data Component Selection** page, select the **Select All** check box.

10	Interaction Migrator	X
Genes	raction Migrator	00
	Select the data you would like to export.   Dialer Configuration  Media Server Certificate Files  Media Server Configuration File  Resources  Server Certificate Files	
	✓ S <back nex<="" td=""><td>ielect All</td></back>	ielect All

5. On the Configuration page, complete the information and then click Next.

13	Interaction Migrator	X
Genesys Interac	tion Migrator	00
	Where would you like to save the exported configuration data?	
	< Back Next >	Cancel

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.

#### Important!

Do NOT select the root directory of the drive where Interaction Media Server is installed (for example, do not save to the root of  $\IICCIC$ ) and ensure the export filename contains the name of your Interaction Media Server.

**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, select the check box to specify the password. There are no limitations for setting the password.

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

0	Interaction Migrator	X
Gene	eys teraction Migrator	00°
	Export Confirmation Export File Path:C:\Users\echo_user\Desktop The following nodes will be exported: Dialer Configuration Media Server Certificate Files Media Server Configuration File Resources Server Certificate Files	
	< Back Next >	Cancel

Note: To change your selections, click Back.

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:** To stop the process at any time, click **Stop**. After stopping the process, you can go back and change your selection without exiting Interaction Migrator.

	Interaction Mi	grator		
enesys Interactio	Migrator			00
Export S	tatus			
<b>9</b> (2 <b>9</b> (3	of 88) Exporting C: Program Files (x86) Inter of 88) Exporting C: Program Files (x86) Inter of 88) Exporting C: Program Files (x86) Inter	active Intelligence\Reso active Intelligence\Reso	urces\BusyS \ urces\BusyS	
<b>9</b> (5 <b>9</b> (6	of 88) Exporting C:VPogram Files (x86) Inter of 88) Exporting C:VProgram Files (x86) Inter of 88) Exporting C:VProgram Files (x86) Inter	active Intelligence/Reso active Intelligence/Reso	irces/BusyS irces/BusyS	
(7 (8) (8 (9)	of 88) Exporting C:\Program Files (x86)\Inter of 88) Exporting C:\Program Files (x86)\Inter of 88) Exporting C:\Program Files (x86)\Inter	active Intelligence/Reso active Intelligence/Reso active Intelligence/Reso	urces\BusyS urces\BusyS ≣ urces\BusyS	
90	0 of 88) Exporting C:\Program Files (x86)\Inte 1 of 88) Exporting C:\Program Files (x86)\Inte	ractive Intelligence/Res ractive Intelligence/Res	ources\Busy	
<	ш	-	>	
<	ш		Stop	
<	III		Stop	
<	111		Stop	

When the export process is complete, the **Export Status** page displays the name and location of the Interaction Media Server configuration data file, and how long the process took.

		interact	ion migrator			
Interact	on Migrator					0
Export	Status					
000000000000000000000000000000000000000	(80 of 88) Exporting (81 of 88) Exporting (82 of 88) Exporting (83 of 88) Exporting (84 of 88) Exporting (85 of 88) Exporting	g C:\Program Files g C:\Program Files g C:\Program Files g C:\Program Files g C:\Program Files g C:\Program Files g C:\Program Files	(x86)Unteractive Intellig (x86)Unteractive Intellig (x86)Unteractive Intellig (x86)Unteractive Intellig (x86)Unteractive Intellig (x86)Unteractive Intellig	enceResources enceResources enceResources enceResources enceResources enceResources	V3ttsv V3ttsv V3ttsv V3ttsv V3ttsv V3ttsv	^
000	(86 of 88) Exporting (87 of 88) Exporting Exporting Resource	g C:VProgram Files ( g C:VProgram Files ( s.	(×86)\Interactive Intellig (×86)\Interactive Intellig	ence/Resources ence/Resources	vattsv Vättsv	
9 9 9 4	(86 of 88) Exporting (87 of 88) Exporting Exporting Resource Exporting Server Co III	g C:\Program Files ( g C:\Program Files ( bs. ertificate Files.	(x86)Vinteractive Intellig (x86)Vinteractive Intellig	ence\Resources ence\Resources	vattsv Vättsv	~
0 0 0 0 0	(86 of 88) Exporting (87 of 88) Exporting Exporting Resource Exporting Server Of	g C:VProgram Files ( g C:VProgram Files ( ss. ertificate Files.	(x86)Vinteractive Intellig (x86)Vinteractive Intellig	ence/Resources ence/Resources	vantsv Vättsv	~
Con Opp	(86 of 88) Exporting (87 of 88) Exporting Exporting Resource Exporting Server Co III figuration Data Expo 02017105730.ininm cess Completed in 0	g C:\Program Files ( g C:\Program Files ( ss. entificate Files. orted to C:\Users\e igr	(x86)Vinteractive Intellig (x86)Vinteractive Intellig (x86)Vinteractive Intellige (x86)Vinteractive Intellige (x86)Vinteractive Intellige	ence/Resources ence/Resources	vatisv Vättsv	~
Con O92 Prod	(86 of 88) Exporting (87 of 88) Exporting Exporting Resource Exporting Server Co III figuration Data Expo 02017105730.ininm cess Completed in 0	g C:\Program Files ( g C:\Program Files ( is: ertificate Files. orted to C:\Users\e igr Ih 7m 27s	(x86)\Interactive Intellig (x86)\Interactive Intellig (x86)\Unteractive Intellige (x86)\Unteractive Intellige (x86	nce/Resources ence/Resources	vantsv Vättsv	~

The Interaction Media Server configuration data file name is unique. It consists of the server name combined with a date/time stamp. In this example, the Interaction Media Server configuration data file is qf backgammon 07092012143839.ininmigr.

7. Click **Next** to continue.

**Note:** To change your selections, click **Back** and return to the **Export Confirmation** page. After you make your changes, start the export process again. A new Interaction Media Server configuration data file is created.

8. Click Finish to close Interaction Migrator.

0	Interaction Migrator
o00	Interaction Migrator for CIC has finished!
<mark>ଟ୍</mark> ଚ GENESYS <sup>™</sup>	To close this Wizard, click Finish. Zip and Email logs,
	< Back Finish Cancel

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

9. Locate the Interaction Media Server 3.0 configuration data file on the Interaction Media Server 3.0 and copy the file to a USB key or other writeable storage location.

**Note:** Genesys recommends this method of copying the Interaction Media Server configuration data file to so that it's easier to copy the file to the Interaction Media Server 2015 R1 or later.

🔁 D:\Temp\ExportedData							
<u>File Edit View Favorite</u>	es <u>T</u> o	ols	Help				
🔇 Back 🔹 🕥 🖌 🏂 🔎	Search	1	> Folders				
Address C:\Temp\ExportedData							
			Name A	Size	Туре		
File and Folder Tasks	×		Calliope_12062011101004.ininmigr	78,866 KB	ININMIGR File		
Other Places	*						
E Temp							
My Documents							
🪽 My Computer		_					
Ny Network Places							
		-					

# **Complete Interaction Media Server pre-migration procedures**

Before installing or upgrading to Interaction Media Server 2015 R1 or later, complete the pre-migration procedures in this section.

# Copy stored recordings and update the recordings storage path

If you store Interaction Media Server 3.0 recordings locally on the Media Server 3.0, complete this procedure.

#### To copy stored recordings and update the path:

- 1. Copy the recordings from Interaction Media Server 3.0 to an external storage location. Confirm that the copied files are not corrupted.
- 2. If the name of the Interaction Media Server 3.0 doesn't match the name of the Interaction Media Server 2015 R1 or later, update the recordings storage path in Interaction Recorder Policy Editor (in Interaction Administrator), and in the historical records database on the CIC server.

# Export SIP Proxy configuration and save it to an external location

If you use Interaction Media Server 3.0 as a SIP Proxy, export the configuration and save it to an external storage location (for example: C:\Program Files\Interactive Intelligence\Interaction SIP Proxy\Resources\SIPProxyConfig.xml).

# Install or upgrade to Interaction Media Server 2015 R1 or later

The CIC 2.4/3.0 to 4.0 migration process requires a new or upgraded 4.0 Interaction Media Server depending on your existing environment and migration choices.

**Note:** Determine the computer name to use when the server is running Interaction Media Server 2015 R1 or later. To simplify the migration process, use the same name that the computer had when running Interaction Media Server 3.0. To change the name, ensure that you follow the procedure for generating new certificates in <u>Complete post-migration procedures</u>.

# New Interaction Media Server 2015 R1 or later appliance installation

Install the Interaction Media Server 2015 R1 or later software on one of the following:

- An Interaction Media Server 2015 R1 or later appliance purchased from Genesys
- Certified hardware that meets the minimum requirements for Interactive Media Server 2015 R1 or later

For information on how to install a new Interaction Media Server 2015 R1 or later, see "Install Interaction Media Server" in the <u>Interaction Media Server Technical Reference</u> in the <u>PureConnect Documentation Library</u>.

# Existing Interaction Media Server G6 3.0 appliance upgraded to 2015 R1 or later

After you obtain the appropriate upgrade kit from Genesys, which includes a new USB key and a license for Windows 2008 R2 Telecom, follow the steps in the *Upgrade Kit Instructions*.

The Upgrade Kit Instructions include backing up all configurations and recordings before you begin, and then completing the <u>Factory</u> <u>Image Restoration Procedures</u> with the new USB key. After you complete these steps, the server runs on Windows 2008 Telecom edition with Interaction Media Server 2015 R1 or later.

#### Warning!

It is important to back up all configurations and recordings. As soon as you begin the Factory Image Restoration Procedure, all existing data on the Media Server's hard drives is lost.

# Existing Interaction Application (IAS) G7 or CIC Server G7 3.0 appliance used as Interaction Media Server upgraded to 2015 R1 or later

Upgrade the existing (IAS) or CIC Server G7 appliance used as an Interaction Media Server to 2015 R1 or later using the steps in the *Factory Image Restoration Procedures Technical Reference*.

These steps include backing up all configurations before you begin and then completing the <u>Factory Image Restoration Procedures</u> with the new USB key, which includes the option to upgrade Interaction Media Server's operating system to Windows Server 2008 R2 using the internal USB key.

#### Warning!

It is important to back up all configurations and recordings. As soon as you begin the Factory Image Restoration Procedure, all existing data on the Media Server's hard drives is lost.

Next, install Interaction Media Server 2015 R1 or later on the upgraded Media Server as described in "Install Interaction Media Server" in the <u>Interaction Media Server Technical Reference</u> in the <u>PureConnect Documentation Library</u>.

# Apply the latest CIC 4.0 Service Update for Interaction Media Server

After you install a new Interaction Media Server 4.0 or upgrade an existing Interaction Media Server appliance to 4.0, apply the CIC 4.0 Service Update for Interaction Media Server that is the same version or higher than the CIC 4.0 server, as described in "Apply Interaction Media Server Service Updates" in the <u>Interaction Media Server Technical Reference</u> in the <u>PureConnect Documentation Library</u>.

# Install Interaction Migrator on Interaction Media Server 2015 R1 or later

Before you install Interaction Migrator on the Interaction Media Server 2015 R1 or later, ensure that you fulfill the Microsoft .NET Framework requirements for Interaction Media Server. These requirements and installation instructions are described in <u>Interaction Migrator Installation</u>.

To ensure that you install the appropriate version of Interaction Migrator see <u>Install Interaction Migrator</u> and <u>https://my.inin.com/products/cic/Pages/Migrations.aspx</u>.

# Import Interaction Media Server 3.0 configuration data

This section describes importing Interaction Media Server 3.0 configuration data to Interaction Media Server 2015 R1 or later using Interaction Migrator.

#### To import Interaction Media Server 3.0 configuration data:

- 1. Stop the Interaction Media Server 2015 R1 or later service.
- 2. Log on to the Interaction Media Server 4. 2015 R1 or later using the same CIC administrator account as when you imported the CIC 3.0 configuration data.
- Copy the Interaction Media Server 3.0 configuration data file from your storage media (as described in the last step in <u>Export</u> <u>Interaction Media Server 3.0 Configuration Data</u>) to the Interaction Media Server 2015 R1 or later. For example, copy the file 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\CIC) as it overwrites critical files).

- 4. Start Interaction Migrator, either from the Interaction Migrator link on the desktop, or from Start -> Programs -> Interactive Intelligence -> Interaction Migrator.
- 5. On the **Welcome** page, click **Next**.
| 0                                      | Interaction Migrator   |
|--|--|
|  | Welcome to Interaction Migrator for CIC  |
| ooo                                    | The Interaction Migrator is a wizard-based tool that<br>exports and imports configuration data related to the CIC<br>Server, Interaction Media Server, and other components<br>of the Customer Interaction Center.<br>Interaction Migrator is version independent. It can be<br>used as part of a migration from one CIC release to<br>another, or for recovery and version control.<br>To continue, click Next. |
| <mark>ଟ୍</mark> ଟ GENESYS <sup>-</sup> | <mark>Zip and Email Logs.</mark><br>Build 0.0.0.0  |
|  | < <u>B</u> ack <u>N</u> ext > <u>C</u> ancel   |

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

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

12	Interaction Migrator	X
Genesys Interaction	on Migrator	00°
	Select the configuration data to import:	
	Migration Mode     O Recovery Mode	
	< Back Next >	Cancel

7. On the **Configuration** page, specify the location of the Interaction Media Server 3.0 configuration data . zip file and the folder to extract the Interaction Media Server 3.0 configuration data file. Click **Migration Mode**, and then click **Next**.

4	Interaction Migrator	X
Genesys Interact	tion Migrator	ő
	Select the configuration data to import:   I   Select folder for imported files to be extracted to:   Set password for import file:   Import file:	
	Migration Mode     O Recovery Mode	
	< Back	Vext > Cancel

Select the configuration data to import: Location of the exported Interaction Media Server 3.0 configuration data file (for example, qf\_backgammon\_07092012143839.ininmigr) on the USB key or other writeable storage location.

Select folder for imported files to be extracted to: Directory to extract the Interaction Media Server 3.0 configuration data file to. For example, extract the data to D:\Temp\ImportData.

Important!

Do *NOT* copy the file to the root directory of the drive where Interaction Media Server 2015 R1 or later is installed (for example, do not copy to the root of \I3\CIC) as critical files are overwritten and ensure the file you import contains the name of your Interaction Media Server and *not* the name of your CIC server.

Set password for export file: If selected, you set a password on the Interaction Media Server 3.0 configuration data file.

**[Password]:** Password for the Interaction Media Server 3.0 configuration data file. This box is available if you selected the **Set password for export file** check box.

**Create registry and file restore point:** Interaction Migrator creates a registry restore point for restoring the registry back to the point before running Interaction Migrator to import the Interaction Media Server 3.0 configuration data. When this option is selected, Interaction Migrator runs a registry export of the Interactive Intelligence key in hive format. This file is located in the C:\Program Files (x86)\Interactive Intelligence\Migrator folder and has a file name extension of .hive. Genesys recommends that you keep the default setting.

Migration Mode: If selected, Interaction Migrator runs in migration mode. It is selected by default and you cannot clear it.

Notes:

- When moving data from one server to another, take into account server name and site name changes. Interaction Migrator changes the data at run time before importing it into the new server.
- 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.

8. On the Select Items to Import page, ensure Select All (default) is selected and then click Next.

<b>Q</b>	Interaction Migrator	X
Gene: In	<b>ys</b> eraction Migrator	00°
	Select items to import	
	Select All	
	< Back Next > C	ancel

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

Inter	action Migrator		X
nesys Interaction Migrator			00
Import Confirmation			
Import File Name:C:\Users\echo_user\ The following files will be imported:	\Documents\echo_0920201	7105730.ininmigr	
Media Server Configuration File Resources			
	< Back	Next >	Cancel

The Import Status page displays real-time updates during the import process.

Ð	Interaction Migrator	X
Genea	sys teraction Migrator	00°
	Import Status	
	<ul> <li>Decompressing File: Program Files (x86)/Interactive Intelligence/Resources/I3tts/</li> </ul>	
	Stop	
	< Back Next > C	ancel

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

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

When the import process is complete, the **Import Status** page displays when the import completed and how long the process took.

	Interaction Migrator	
Sene In	<b>sys</b> Iteraction Migrator	00°
	Import Status	
	Copying file C: \Program Files \Interactive Intelligence\Resources\DialTone(Norwa Copying file C: \Program Files\Interactive Intelligence\Resources\RingBack(United Copying file C: \Program Files\Interactive Intelligence\Resources\RingBack(Italy).\     Copying file C: \Program Files\Interactive Intelligence\Resources\RingBack(Singat Copying file C: \Program Files\Interactive Intelligence\Resources\RingBack(Resources\RingBack(Singat Resources\RingBack(Resources\RingBack(Resources\RingBack(Resources\RingBack(Resources\RingBack(Resources\RingBack(Resources\RingBack(Resources\RingBack(Resources\RingBack(Resources\RingBack(Resources\RingBack(Resources\RingBack(Resources\RingBack(Resources\RingBack(Re	
	Copying file C:\Program Files\Interactive Intelligence\Resources\tts_voice.i3seria	
	Import completed on 9/20/2017 11:11:12 AM Process Completed in 0h 0m 23s	-
	< Back Next >	Cancel

- 10. Click Next to continue.
- 11. Click **Finish** to close Interaction Migrator.

0	Interaction Migrator
ooo	Interaction Migrator for CIC has finished!
Senesys <sup>-</sup>	To close this Wizard, click Finish. Zip and Email logs,
	< Back Finish Cancel

Note: 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.

## **Complete post-migration procedures**

After migrating to the Interaction Media Server 2015 R1 or later, complete the post-migration procedures in this section.

#### Generate new certificates for your CIC servers

New certificates tie to a host name. Generate new certificates for your CIC 2015 R1 or later servers under the following scenarios:

- Your Interaction Media Server 2015 R1 or later has a different name than your Interaction Media Server 3.0.
  - If you did not choose to use the same computer name as the one when running Interaction Media Server 3.0 as recommended, follow this procedure.

The existing certificates for the CIC servers joined to the Interaction Media Server 3.0 tie to the Interaction Media Server 3.0 host name. Even though you can move certificates from your Interaction Media Server 3.0 to your Interaction Media Server 2015 R1 or later, these certificates associate to the Interaction Media Server 3.0 host name. Due to the name change, you must recreate the certificates.

#### To generate new certificates:

- 1. Remove and add back all CIC servers that are present on the Interaction Media Server 4.0.
- 2. Go to CIC Server Sub-System Certificates Configuration, and mark the certificates as "Trusted."
- For more information, see the Interaction Media Server Technical Reference in the PureConnect Documentation Library.
- Your CIC 4.0 server has a different host name than your CIC 3.0 server.

Keeping the CIC server name from CIC 3.0 to CIC 2015 R1 or later requires significant downtime as both devices cannot exist on the same network with the same name. If you decide to change the name of your CIC 2015 R1 or later server, add the CIC 2015 R1 or later server to your Interaction Media Server 2015 R1 or later either before or after importing the CIC configuration data using Interaction Migrator.

## Update the recordings storage path in Interaction Recorder Policy Editor

If the name of the Interaction Media Server 3.0 doesn't match the name of the Interaction Media Server 2015 R1 or later, or if the path to the stored Interaction recordings changed, update the recordings storage path in Interaction Recorder Policy Editor (accessed through Interaction Administrator), and in the historical records database on the CIC server.

If you stored recordings locally on Interaction Media Server 3.0, complete this procedure.

#### To update the recordings storage path in Interaction Recorder Policy Editor:

- 1. Do the following to update the UNC path for the Recordings directory:
  - a. Open Interaction Administrator, expand the Interaction Recorder node, and click Policy Editor.
  - b. In the right pane, double-click Configuration. Interaction Recorder Policy Editor appears.
  - c. Click the **Retention** tab, and in the **Policy Description** area, click the path to the media. The **Select Folder** dialog box appears.
  - d. Type the path to the Media Server 2015 R1 or later Recordings shared directory.
- 2. Update the UNC Path for Historical Recording Data in your CIC database.

#### Restore the SIP Proxy configuration file to the SIP Proxy Server install directory

If you used Interaction Media Server 3.0 as a Proxy Server, restore the SIPProxyConfig.xml file to the SIP Proxy Server install directory.

#### Set up any other applications from the Interaction Media Server 3.0 post-migration

Set up any other applications from the Interaction Media Server 3.0 environment before the migration (for example, Interaction Recorder Remote Content Server, off-server Session Manager).

#### Add CIC 2015 R1 or later server to Interaction Media Server

Add the CIC 4. 2015 R1 or later server to the Interaction Media Server 2015 R1 or later as described in "Add CIC server to Interaction Media Server" in the <u>Interaction Media Server Technical Reference</u> in the <u>PureConnect Documentation Library</u>.

# **Migrate Client Workstations**

This section describes how to plan for and migrate client workstations.

## **Workstation Migration Planning**

This section describes planning considerations for migrating/upgrading client workstation applications on existing CIC 3.0 workstations to CIC 2015 R1 or later.

## **Options for upgrading CIC 3.0 client workstation applications**

There are three options for migrating/upgrading existing CIC 3.0 client workstation applications to CIC 2015 R1 or later:

- Interactive Update (Recommended) Use Interactive Update to upgrade CIC 3.0 client workstations to CIC 2015 R1 or later. For more information, see Migrate CIC 3.0 Workstations using Interactive Update.
- Manual (Setup.exe) Upgrade CIC 3.0 client workstation applications to CIC 2015 R1 or later manually by running Setup.exe from the appropriate workstation application share on the CIC server. For more information, see Migrate CIC 3.0 Workstations using Setup.exe.
- **Group Policy** Use group policy deployment (Windows startup scripts) to upgrade CIC 3.0 client workstations to CIC 2015 R1 or later. For more information, see the <u>Group Policy Deployment for CIC Applications Technical Reference</u> in the <u>PureConnect</u> <u>Documentation Library</u>.

**Note:** For more information about options available for this scenario, see <u>CIC 2.4 to CIC 2015 R1 or later client workstation</u> <u>upgrades</u>.

## About CIC 3.0 to CIC 2015 R1 or later client workstation upgrade installations

Review the important items about CIC 2015 R1 or later client workstation migration/upgrade installations in this section.

#### Migration/upgrade scenario is for same OS only

The migration scenario for client workstations is to migrate/upgrade CIC client workstation applications from CIC 3.0 to CIC 2015 R1 or later on the same workstation.

#### Previously installed workstation applications are uninstalled

When you run a CIC 2015 R1 or later client workstation install on a CIC 3.0 workstation, it uninstalls the CIC 3.0 versions of the workstation application components installed on the workstation. After the uninstall, it installs the 2015 R1 or later version of the application components.

#### Previously installed localized workstation applications

For CIC 3.0 implementations that include localized client workstation applications, note that:

- If you ran the CIC 3.0 User Applications install with **UAC disabled**, the CIC 2015 R1 or later User Applications install removes the 3.0 language-related files and registry keys.
- If you ran the CIC 3.0 User Applications install with **UAC enabled**, the CIC 2015 R1 or later User Applications install does *not* remove the 3.0 language-related files and registry keys.

#### CIC 2015 R1 or later client workstation hardware requirements

For minimum and recommended hardware requirements for running IC User Applications, IC Business Manager Applications, and IC Server Manager Applications on client workstations, see "Client Workstation" in the <u>PureConnect Installation and Configuration</u> <u>Guide</u> in the <u>PureConnect Documentation Library</u>.

## CIC 2015 R1 or later client workstation software requirements

Before upgrading CIC 3.0 client workstations to CIC 2015 R1 or later, ensure that you fulfilled the software requirements for running IC User Applications, IC Business Manager Applications, and IC Server Manager Applications on client workstations. For information about the requirements, see "Client Workstation" in the <u>PureConnect Installation and Configuration Guide</u>.

This section provides a summary of the CIC 2015 R1 or later client workstation software requirements. For more information and instructions, see "Client Workstation" in the <u>PureConnect Installation and Configuration Guide</u> in the <u>PureConnect Documentation</u> <u>Library</u>.

#### Windows OS requirements

- Microsoft Windows 10 version 1511 (32-bit and 64-bit)
- Microsoft Windows 8.1 (32-bit and 64-bit)
- Microsoft Windows 8 (32-bit and 64-bit)
- Microsoft Windows 7 SP1 (32-bit and 64-bit)

#### Notes:

- CIC 2015 R1 or later does not support Windows XP.
- See Changes to IC User Applications in CIC 4.0 to learn about the components included in IC User Applications 4.0.

#### **Other requirements**

- PureConnect 2018 R4 or later requires Microsoft .NET Framework 4.7 or later and Microsoft .NET Framework 3.5.1
- CIC 2015 R1 through 2018 R3 require Microsoft .NET Framework 4.5.2 or later and Microsoft .NET Framework 3.5.1

**Note:** Some Windows operating systems don't support Microsoft .NET Framework 4.7. If your PureConnect version requires Microsoft .NET Framework 4.7 or later, ensure that you have a supported Windows operating system installed. For more information, see <a href="https://docs.microsoft.com/en-us/dotnet/framework/get-started/system-requirements">https://docs.microsoft.com/en-us/dotnet/framework/get-started/system-requirements</a>.

## Changes to IC User Applications in CIC 2015 R1 or later

Note the following changes to IC User Applications from CIC 3.0 to CIC 2015 R1 or later:

- CIC 4.0 contains two versions of IC User Applications installs: 32-bit and 64-bit. Ensure that you use the install version (32-bit or 64-bit) appropriate for the workstation.
- Interaction Screen Recorder Capture Client is a separate install in CIC 3.0. In CIC 2015 R1 or later. The IC User Applications (32bit and 64-bit) install includes it.
- Interaction Fax 64-bit Print Driver is a separate install in CIC 3.0 SU 11 and later. In CIC 2015 R1 or later, the IC User Applications (64-bit) install includes it.

## **Custom client settings**

**Note:** Starting with CIC 2015 R3, Interaction Desktop replaces Interaction Client .NET Edition as the primary CIC client. Before you continue, see "Interaction Client .NET Edition 3.0 migration" in the <u>Transition to Interaction Desktop Administrator's Guide</u> in the <u>PureConnect Documentation Library</u>.

Interaction Desktop persists users' customized configuration in two locations: the CIC server and the local workstation. This section describes the handling of custom settings stored on the CIC server and locally on client workstations during the migration.

### Custom client settings stored on the CIC server

All custom client settings on the CIC server migrate during the CIC server migration to CIC 2015 R1 or later using Interaction Migrator. When migrating from a 3.0 to a 4.0 server, Interaction Migrator moves the client settings files to the 3.0 location. In 4.0 SU 4, Interaction Migrator renames the client setting files to Interaction Client.zip and moves the file to the following location:

CIC\ClientSettings\<user\_name>\PersonalStorage\ApplicationSettings\

For more information, see Export CIC 2.4/3.0 Configuration Data.

#### Custom client settings stored on the workstation

The migration preserves the following locally-stored custom client settings during the migration. For other locally-stored custom settings, reconfigure them in Interaction Desktop.

Client settings persisted to the local computer:

- Main Form
  - Form Location & Size
- Response Management Form
  - Form Position & Size
  - Splitter Distance
  - Expanded Nodes
  - Pinned Nodes
- Work Items
  - Button Panel Width
  - Splitter Is Collapsed
- New View Form
  - Form Position and Size
  - New View Selected Index (last selected category)
- My Interactions Queue Control
  - (Monitored Queues) Button Panel Width
- Set Status Form
  - Form Position and Size
- Interaction Properties Form
  - Form Location and Size
- Chat Form
  - Form Location and Size
- Email Form
  - Form Location and Size
- Camp Toast
  - Always Pop
  - Auto Hide
- Directories
  - Migrated
  - Toolbar Button Order
  - Toolbar Show Text
- Voicemail Player
  - Playback Device
  - Remote Number
- Other/Miscellaneous
  - Advanced Dial Options Account Code (last used)
  - Advanced Dial Options Workgroup (last used)
  - Configuration Dialog Box Last Open Page Module
  - Configuration Dialog Box Last Open Page Name
  - Lock Client Pages (From Client's Menu: **Options**->Lock the Views)
     Pages Dock Area (This area is the XML containing layout for the different docks/views)
  - Plugin.[Name\_Of\_Plugin] (one for each plugin user has enabled via Configuration Dialog Box)
  - Run Once (automatically add Company Directory on first run)
  - Run Once History (automatically add Call History view on first run)
  - Show Exit Warning Once (taskbar balloon tooltip which appears on first "close")

## Localized client workstation application upgrades

CIC 4.0 SU1 introduced the following new functionality for localized client workstation application installations:

- CIC 3.0 and earlier includes languages for CIC client workstation applications in the CIC client workstation application installs as features.
- CIC 2015 R1 or later, released Language Pack resource files for CIC client workstation applications as Client Language Plugin installs to simplify deployment. For more information about Client Language Plugins, see "CIC Language Pack Client Workstation Installation" in the <u>CIC Language Pack Technical Reference</u> in the <u>PureConnect Documentation Library</u>.

**Interactive Update applies updates to Client Language Plugins** in the same way it applies updates to CIC client workstation applications. For instructions on migrating/upgrading localized CIC 3.0 client workstation applications to CIC 2015 R1 or later using Interactive Update, see "Migrate CIC 3.0 Workstations using Interactive Update".

Setup.exe installs/updates Client Language Plugins along with the CIC client workstation applications. For instructions on migrating/upgrading localized CIC 3.0 client workstation applications to CIC 2015 R1 or later using Setup.exe, see Migrate CIC 3.0 Workstations using Setup.exe.

**Note:** For information about the languages supported in CIC 2015 R1 or later, the Service Update releases in which they are available, and the scope of localization for each language, see the CIC Localization page at <a href="https://my.inin.com/products/cic/Pages/Localization.aspx">https://my.inin.com/products/cic/Pages/Localization.aspx</a>.

## CIC 2.4 to CIC 4.0 client workstation application upgrades

Migrating/upgrading client workstation applications on *existing* CIC 2.4 workstations to CIC 2015 R1 or later is not recommended in most cases, since most CIC 2.4 workstations will not likely meet the CIC 2015 R1 or later client workstation Windows OS and .NET Framework requirements.

If you choose to migrate/upgrade existing CIC 2.4 workstations to CIC 2015 R1 or later, the options are:

- Manual (Setup.exe) Manually upgrade client workstation applications to CIC 2015 R1 or later by running Setup.exe from the appropriate workstation application share on the CIC server. See <u>Migrate CIC 3.0 Workstations using Setup.exe</u>.
- **Group Policy** Use group policy deployment (Windows startup scripts). See <u>Group Policy Deployment for CIC Applications</u> <u>Technical Reference</u> in <u>PureConnect Documentation Library</u>.

**Note:** CIC 3.0 introduced the IC User Applications, IC Business Manager Applications, and IC Server Manager Application modules. It also introduced Interactive Update.

## Interaction Dialer 2.4/3.0 to CIC 2015 R1 or later client workstation application upgrades

Interaction Dialer 2.4/3.0 to CIC 2015 R1 or later client workstation application upgrades work the same way as CIC 2.4/3.0 to CIC 2015 R1 or later client workstation application upgrades.

#### Notes:

- You can upgrade Interaction Scripter .NET using Interactive Update, Setup.exe, or group policy the same way as the CIC client workstation applications.
- If you installed Interaction Scripter Win32, the Interaction Scripter .NET install removes it.

## Migrate CIC 3.0 Workstations Using Interactive Update

This section describes how to use Interactive Update to migrate/upgrade CIC 3.0 client workstations to CIC 2015 R1.

## About Interactive Update

Interactive Update is the recommended method for applying PureConnect product releases and patches. For CIC 3.0 to CIC 2015 R1 or later migrations, Interactive Update applies major version upgrades.

Interactive Update is similar to the Microsoft Update process. It allows CIC administrators to manage updates to PureConnect products, and to download and apply the updates to the CIC server, client workstations, and other devices on the CIC system network.

**Note:** This section assumes that you are familiar with managing and applying PureConnect product updates using Interactive Update. For general instructions and procedures, see the <u>Interactive Update Technical Reference</u> in the <u>PureConnect</u> <u>Documentation Library</u>.

## **Required CIC and Interactive Update versions**

It is crucial that you install the correct CIC and Interactive Update versions on the CIC 3.0 server, CIC 3.0 client workstations, and the CIC 2015 R1 or later server before you attempt to upgrade the CIC 3.0 client workstations to 2015 R1 or later using Interactive Update. The required CIC and Interactive Update Service Update (SU) versions contain the functionality necessary for the migration/upgrade.

#### CIC 3.0 server

The CIC 3.0 server requires the following:

- CIC 3.0 SU 14 or later
- (If applicable) CIC 3.0 SU 14 or later Language Packs
- Interactive Update Provider and Interactive Update Client 1.0 SU 12 with IUPDATE-1848 ES and IUPDATE-1890 ES

#### CIC 3.0 client workstation

CIC 3.0 workstations require the following:

- CIC 3.0 SU 14 or later CIC Workstation Applications
- (If applicable) CIC 3.0 SU 14 or later localized workstation applications
- Interactive Update Client 1.0 SU 12 with IUPDATE-1848 ES

#### CIC 2015 R1 or later server

The CIC 2015 R1 or later server requires the following:

- CIC 2015 R1 or later
- (If applicable) 2015 R1 or later Language Packs
- Interactive Update Provider and Interactive Update Client 2015 R1 or later

## **Interactive Update Provider settings**

This section describes the Interactive Update Provider settings on the CIC 3.0 and CIC 2015 R1 or later servers.

#### Interactive Update Provider 1.0 on CIC 3.0 server

On the **About** page, verify that the Interactive Update Provider 1.0 on the CIC 3.0 server has the correct local provider and PureConnect provider settings.

The About page lists the CIC 3.0 server as the local provider. In the following example, the CIC 3.0 provider is qf-workflow.

00°	Interactive Update	Provider	Status Settings Help
Status			
() About	Machine Name	qf-workflow.Qfun.com	
Activity	Provider IP Address	10.10.6.56	
Activity	_		

#### Interactive Update Provider 2015 R1 or later on CIC 2015 R1 or later server

On the **About** page, verify that the Interactive Update Provider 2015 R1 or later on the CIC 2015 R1 or later server has the correct local provider and settings.

## CIC 3.0 to CIC 2015 R1 or later client workstation migration overview

For a general description of the Interactive Update architecture, see the <u>Interactive Update Technical Reference</u> in the <u>PureConnect</u> <u>Documentation Library</u>.

#### Part 1: Client workstation migration tasks on Interactive Update Provider 1.0

This procedure, completed on the Interactive Update Provider 1.0 server (CIC 3.0 server) consists of the following tasks:

- Add the Interactive Update Client 2015 R1 or later install as a new update (major version upgrade), pulled from the CIC\_IUpdate share on the CIC 2015 R1 or later server.
- Set an MSI parameter to change the local provider from the CIC 3.0 server to the CIC 2015 R1 or later server. This action changes a configuration setting on all workstations receiving the Interactive Update Client 2015 R1 or later install so that the Interactive Update Client service on those workstations starts receiving updates from the Interactive Update Provider 2015 R1 or later server.
- Create a computer group for the client workstations to migrate to for testing purposes. (You can create more groups later for a phased or full deployment.)
- Mark the Interactive Update Client 2015 R1 or later install as GA and push it out to the client workstations in the migration computer group.

The following illustration shows Part 1 of the client workstation upgrade on Interactive Update 1.0 Provider on the CIC 3.0 server:



#### Part 2: Client workstation upgrade tasks on Interactive Update Provider 2015 R1 or later

This procedure, completed on the Interactive Update Provider 2015 R1 or later server (CIC 2015 R1 or later server) consists, of the following tasks:

If you use the PureConnect provider (<u>updates.inin.com</u>) to get updates on the CIC server, the latest Interactive Update Client 2015 R1 or later update is added to Interactive Update Provider automatically.
 -OR-

If you download and apply updates to the CIC server manually, add the latest Interactive Update Client 2015 R1 or later install as a new update in Interactive Update Provider, pulled from the CIC\_Update share on the CIC 2015 R1 or later server.

- Add the CIC 2015 R1 or later client workstation application installs and SUs as new updates, pulled from the appropriate shares on the CIC 2015 R1 or later server.
- If applicable, add the Client Language Plugins for the CIC 2015 R1 or later client workstation applications as new updates, pulled from the appropriate shares on the CIC 2015 R1 or later server.
- Mark the Interactive Update 2015 R1 or later update and CIC 2015 R1 or later client workstation application installs as GA and push out to client workstations.

The following illustration shows Part 2 of the client workstation upgrade on Interactive Update 2015 R1 or later Provider on the CIC 2015 R1 or later server:



For instructions, see Part 2: Client workstation upgrade tasks on Interactive Update Provider 2015 R1 or later.

## Part 1: Client workstation upgrade tasks on Interactive Update Provider 1.0

This section describes the client workstation upgrade tasks on Interactive Update Provider 1.0.

#### CIC 3.0 client workstation applications in example scenario

This example shows the following applications installed already on the CIC 3.0 client workstations:

- CIC 3.0 SU 20 Business Manager Applications
- CIC 3.0 SU 20 Server manager Applications
- CIC 3.0 SU 20 User Applications
- Interactive Update 1.0 SU 12

Interactive Update 2015 R1 GA installs as a major version upgrade.

# Add the Interactive Update Client 2015 R1 or later as a new update, allow workstations to receive updates from Provider 2015 R1 or later

This task consists of:

- Adding the Interactive Update Client 2015 R1 or later install as a new update (major version upgrade), pulled from the CIC\_IUpdate share on the CIC 2015 R1 or later server.
- Setting an MSI parameter that changes the local provider from the CIC 3.0 server to the CIC 2015 R1 or later server. This action changes a configuration setting on all workstations receiving the Interactive Update Client 2015 R1 or later install so that the Interactive Update Client service on those workstations starts receiving updates from the Interactive Update Provider 2015 R1 or later server. This action or later on the CIC 2015 R1 or later server.

#### To add the Interactive Update Client 2015 R1 or later install as a new update:

1. Open Interactive Update Provider 1.0 on the CIC 3.0 server and click the **Updates** page.

Settings				
pdate Servers	Updates can be added to Interactive Update Provider using the 'Actio perform an operation on an existing item in the grid, select the item is menu or use a <i>right mouse click</i> to bring up a context menu. Product Line : Product :	n' dropdowr first and the	n menu on the ri n either use the	pht. To dropdown
Iministration	Action :	🔣 Add Ne	w Update	- 🗘
	Drag a column to this area to group by it.			
achines	Description	su	Current State	Status
4	Interaction Center Business Manager Applications with su10	SU20	2	
	Interaction Center Server Manager Applications with su10	SU20		3
dates	Interaction Center User Applications with su10	\$U20	2	
	Interactive Update Client	SU12	۵	
				(1 34444)

Note: CIC 3.0 includes the German and Spanish versions of IC User Applications within the IC User Applications update.

- 2. In the Action list box, click Add New Update and then click the arrow [] next to the list box. The Add New Update page appears.
- 3. In the Add New Update page, click Browse.
- 4. In the Choose File to Upload page, in the File name box, type \\servername\CIC\_Update and then click Open to view the contents of the CIC\_IUpdate share on the CIC 2015 R1 or later server.
- 5. In the CIC\_Update share, click IUpdateClient.msi and then click Open.

Choose File to Up	load			? ×
Look jn:	\begin{split} [C_IUpdate or	n qf-checkers	💽 🗿 👂 📴 🖬 -	
My Recent Documents Desktop My Documents My Computer	backup Josepher Ling JupdateClient_ IUpdateClient_	nsi LANG_ar.mst LANG_de.mst LANG_es.mst LANG_fr.mst LANG_fr.mst LANG_ja.mst LANG_ja.mst LANG_ja.mst LANG_no.mst LANG_no.mst LANG_pl.mst LANG_pt-br.mst	IUpdateClient_LANG_sr.mst IUpdateClient_LANG_sv.mst IUpdateClient_LANG_tr.mst IUpdateClient_LANG_zh-hans.mst IUpdateClient_LANG_zh-hant.mst IUpdateClient_SU3.msp Setup.exe	
My Network Places	File <u>n</u> ame:	IUpdateClient.msi	<b>•</b>	<u>O</u> pen
	Files of <u>t</u> ype:	All Files (*.*)	•	Cancel

The system adds the \\servername\CIC Update\IUpdateClient.msi path to the File box in the Add New Update page.

6. In the **MSI Properties** box, type providerservername=*servername* to change the local provider from the CIC 3.0 server to the CIC 2015 R1 or later server. Genesys recommends using a fully qualified domain name (FQDN), not a short name.

Line :	Product :
Add New Updat	Action : 🙀 Add New Up
Update Properties	
Add a new update	e by selecting the update using the Browse button.
File:	\\qf-checkers\IC_IUpdate\IUpdateClient.ms Browse
	Add all updates in this directory
MSI Properties:	providerservername=Qf-Checkers.Qfun.com 🔺
	OK Cancel

This action changes a configuration setting on all workstations receiving the Interactive Update Client 2015 R1 or later install so that the Interactive Update Client service on those workstations starts receiving updates from the Interactive Update Provider 2015 R1 or later on the CIC 2015 R1 or later server.

- 7. Click **OK**. An **Update Info** message appears, indicating that the Interactive Update Client 2015 R1 or later install added successfully.
- 8. Click OK. The Interaction Client 2015 R1 or later install appears on the Updates data grid, with the pre- Approval icon in the Current State column.

0				
Jpdate Servers	Updates can be added to Interactive Update Provider using the 'Ao perform an operation on an existing item in the grid, select the ite menu or use a <i>right mouse click</i> to bring up a context menu.	tion' dropdown m first and the	menu on the rig n either use the o	iht. To dropdow
	Product Product :			•
Administration	Actio	n : 🔣 Add Ne	w Update	- 🕄
	Drag a column to this area to group by it.			
Machines	Description	su	Current State	Status
14	Interaction Center Business Manager Applications with su10	SU20	6	
2	Interaction Center Server Manager Applications with su10	\$U20	2	3
Jp-dates	Interaction Center User Applications with su10	SU20		
	Interactive Update Client	SU12	2	
	Interactive Update Client 2016 R2	2016_R2	6	2
	Interactive Update Client 2016 R2	2016_R2	Page 1 of 1	(S iten
	Interactive Update Client 2016 R2 2016_R2			
	Update Properties Advanced Properties			
	GUID: (9F11553F-55EE-4E3F-A6ED-D2188082900	21)		1
	MSI Properties: providerservername=Qf-checkers.Qfun.com	1		
	Forced By Admin: false			
	Forced By Admin: false Speedbump: 🔉 - true			

#### Notes:

- Interactive Update Client 2015 R1 or later has Speedbump icon [ in the Status column, indicating that you must install it before you can apply other updates.
- The change in the local provider setting from the CIC 3.0 server to the CIC 015 R1 or later server appears on the **Advanced Properties** tab under the data grid in **MSI Properties**.

#### Create a migration computer group

Interactive Update 1.0 SU 10 introduced the ability to designate a computer group to upgrade all workstations in that group from Interactive Update 1.0 to Interactive Update 2015 R1 or later (major version upgrade).

Once the Interactive Update 2015 R1 or later install is marked as GA and pushed out to the *migration* computer group, the workstations in the *migration* computer group start receiving updates from Interactive Update Provider 2015 R1 or later on the CIC 2015 R1 or later server.

This feature allows you to:

- Create an initial migration computer group consisting of a small number of workstations to test the migration process.
- Migrate groups of client workstations to CIC 2015 R1 or later in phases, allowing those workstations that have not migrated to continue receiving updates from Interactive Update Provider 1.0 on the CIC 3.0 server.

#### To create a *migration* computer group:

This example adds one computer to a new migration group called toMigrate.

1. In Interactive Update Provider 1.0 on the CIC 3.0 server, click the Machines page.

ő	nteractiv	e Update Pro	vider			
0					Status Se	ettings Help
Settings						
10	Configure indivi display a context i	dual machine settings (in menu.	NON-GROUPED gro	up): Right-cl	ick on the machin	e name to
Update Servers	Configure multip machine names. T from group to and container.	ble machine settings: To s o create or modify a group, ther, select the machine nan	elect multiple machine right-click an entry in ne(s), then drag and d	the Groups of rop onto the	d (or Shift) + left- container. To mov group in the Grou	click on the e machines ups
Administration	Configure indivi	dual machine settings (in menu.	NON-GROUPED gro	up): Right-cl	ick on the machin	e name to
Machines	from group to ano container.	to create or modify a group, ther, select the machine nan	right-click an entry in he(s), then drag and d	the Groups of rop onto the	group in the Grou	e machines ups
Updates	Groups	Drag a column to this are	a to group by it.	Search:		
	MON-GROUPED	Machine	Day	Time	Download Mode	Status
		Qf-Kerplunk.Qfun.com	Every Day	2:00 AM	• Automatic	2
		1			Page 1 of 1	(1 items)

2. Right-click on the NON-GROUPED group in the Groups container and click Add Group.

ő	nteractiv	ve Upo	date Prov	vider			20
0						Status Se	ttings <u>Help</u>
Settings							
	Configure indi display a contex	vidual macl t menu.	nine settings (in i	NON-GROUPED gro	up): Right-cl	ick on the machin	e name to
Update Servers	Configure mul machine names from group to a container.	tiple machin . To create or nother, select	ne settings: To se r modify a group, ri t the machine name	lect multiple machine ight-click an entry in s(s), then drag and d	the Groups of rop onto the	1 (or Shift) + left- ontainer. To mov group in the Grou	click on the e machines ups
Administration	Configure indi display a contex	vidual mact t menu.	nine settings (in )	NON-GROUPED gro	up): Right-cl	ick on the machin	e name to
Machines	Configure mul machine names	tiple machin . To create or nother, select	ne settings: To se modify a group, ri the machine name	lect multiple machine ight-click an entry in e(s), then drag and d	the Groups of	I (or Shift) + left- ontainer. To mov group in the Grou	click on the e machines
Un dates	container.						
opdates	uroups	Drag a co	dumn to this area	a to group by it.	Search:		
	MONTGRO	Add Group		Day	Time	Download Mode	Status
	8	Modify Group	Qfun.com	Every Day	2:00 AM	• Automatic	2
		1	_			Page 1 of 1	(1 items)
		-					(1 101107)

- 3. In the **Add Group** page, do the following:
  - Type a Group Name appropriate to designate it as *migration* computer group, for example, toMigrate.
  - Specify the **Download Mode**, **Download/Install Time**, and **Install Interval** as appropriate for your implementation.
  - Select the Allow Interactive Update Migration check box.

ure multiple machine settings: To select multi e names. To cleate or modify a group, right-click oup to another, select the machine name(s), then	iple machines , press Ctrl (or Shift) + left an entry in the Groups container. To movemach drag and drop onto the group in the Groups
Group Name :	toMigrate
Download Mode :	Automatic (recommended)
Download / Install Time :	12:00 AM
Install Interval :	Every Day
Allow Interactive Update Migration	
	OK Cancel

4. Click **OK**. The **toMigrate** computer group appears in the **Groups** container.

00°	nteractiv	ve Update Prov	vider		<u>Status</u> Se	ttings Hel
Settings						
Update Servers Administration	Configure indi- display a context machine names. from group to ar container. Configure indi- display a context Configure mult machine names. from group to ar container.	vidual machine settings (in t t menu. tiple machine settings: To se . To create or modify a group, ri nother, select the machine name vidual machine settings (in t t menu. tiple machine settings: To se . To create or modify a group, ri nother, select the machine name	NON-GROUPED grou ght-click an entry in s(s), then drag and d NON-GROUPED grou lect multiple machine ght-click an entry in s(s), then drag and d	up): Right-cl is , press Ctr the Groups o rop onto the up): Right-cl is , press Ctr the Groups o rop onto the	ick on the machin ( (or Shift) + left- container. To mov group in the Grou ick on the machin ( or Shift) + left- container. To mov group in the Grou	e name to click on the e machines ups e name to click on the e machines ups
Jpdates	Groups	Drag a column to this area	to group by it.	Search:		
	& NON-GROUPED	Machine	Day	Time	Download Mode	Status
	toMigrate	Of Kernhunk Ofun com	Even Dav	2.00 414	A . Automatic	and the second se
		Su-weibigung Sugar court	Every Day	2100 API	- Auconnacic	2
		1	Every Day	2100 AM	Page 1 of 1	(1 items)

5. Select the computer in the NON-GROUPED group and drag it to the toMigrate group.

**Note:** Starting with Interactive Update 1.0 SU 12, the Modify Group Members option is available. Genesys recommends using this option to populate computer groups as it is simpler and less error-prone than the drag and drop option.

0	nteractiv	e Update	Provide	er.				2
Settings						Status	Settings	ner
Jpdate Servers	Configure indivi display a context Configure multi machine names. 1 from group to and container. Configure indivi display a context Configure multi machine names. 1 from group to and container.	idual machine se menu. ple machine setti To create or modify other, select the ma idual machine se menu. ple machine setti to create or modify other, select the ma	ttings (in NON-G ings: To select mu a group, right-clia ichine name(s), the ttings (in NON-G ings: To select mu a group, right-clia ichine name(s), the	ROUPED group) tiple machines , k an entry in the in drag and drop ROUPED group) tiple machines , k an entry in the in drag and drop	Right-cli Groups of onto the Right-cli press Ctrl Groups of onto the	ok on the ma (or Shift) + ontainer. To r group in the ck on the ma (or Shift) + ontainer. To r group in the o	chine nam left-click o move maci Groups chine nam left-click o move maci Groups	e to in the hines ie to in the hines
pdates	Groups	Drag a column t	o this area to gr	oup by it.	Search:			
	MON-GROUPED	Machine		Day	Time	Download Me	de Statu	
								-
	Qf-Kerplunk	.Qfun.com	Every Day	,2:00 AM 🥥	- Automa	itic 🤱	ic 没	

6. In the Move Machines page, verify that this computer is the one that you want to move to the toMigrate group.

		-	(
acl	Move N hine set	lachine tings: T	es?  So select multiple machines , press Ctrl (or Shift)
		Selecte GROUP	ed machines will be moved from group <b>NON-</b> PED to group <b>toMigrate</b> .
		Are you group?	i sure you want to move machines into this
	Sta	tus	Machines
	Stat	tus	Qf-Kerplunk.Qfun.com
	Sta	tus	Machines Qf-Kerplunk.Qfun.com
	Sta	tus	Machines Qf-Kerplunk.Qfun.com Page 1 of 1 (1 items)
	Sta	tus	Machines Qf-Kerplunk.Qfun.com Page 1 of 1 (1 items)
	<b>Sta</b>	tus	Machines Qf-Kerplunk.Qfun.com Page 1 of 1 (1 items) OK Cancel

7. Click **OK** when the **Machine Moved** page confirms that the computer moved successfully.

Machine Move the or modify a group The sel succes machin	d select multiple machines , press Ctrl (or Sint) + , right-click an entry in the Groups container. To ected machines have all been moved sfully. The grid below contains a list of the
Status	Machines
1	Page 1 of 1 (1 items)
	OK

8. Click the toMigrate group in the Groups container to view the computer in the toMigrate group.

° '	nteractiv	e Update Prov	vider			20
0					Status Se	ettings Help
Settings						
1	Configure indiv display a context	idual machine settings (in t menu.	NON-GROUPED gro	up): Right-c	lick on the machin	ne name to
Update Servers	Configure multi machine names. from group to and container.	ple machine settings: To se To create or modify a group, ri ther, select the machine name	lect multiple machine ght-click an entry in (s), then drag and d	es , press Ct the Groups frop onto the	rl (or Shift) + left- container. To mov group in the Gro	-click on the re machines ups
Administration	Configure indiv display a context	idual machine settings (in M menu.	NON-GROUPED gro	up): Right-c	lick on the machin	ne name to
Machines	Configure multi machine names. from group to and container.	ple machine settings: To se fo create or modify a group, ri other, select the machine name	lect multiple machine ght-click an entry in (s), then drag and d	the Groups frop onto the	rl (or Shift) + left container. To mov group in the Gro	click on the re machines ups
Updates	Groups	Drag a column to this area	to group by it.	Search:		
	MON-GROUPED	Machine	Day	Time	Download Mode	Status
	Constraints	Qf-Kerplunk.Qfun.com	Every Day	12:00	Automatic	2
		1			Page 1 of 1	(1 items)

#### Mark Interactive Update Client 2015 R1 or later as GA and push out to the migration computer group

In the final task on the CIC 3.0 server, mark the Interactive Update Client 2015 R1 or later install as GA and push it out to the workstation in the **toMigrate** group.

#### To mark Interactive Update Client 2015 R1 or later as GA and push out to the migration computer group:

- 1. In Interactive Update Provider 1.0 on the CIC 3.0 server, click the **Updates** page.
- 2. Right-click Interactive Update Client GA (2015 R1 or later) and then click Change Current State -> Mark as 'GA'.
- 3. A message similar to the following message appears. Click **OK** to continue.



The message may indicate incorrect version numbers. This message indicates that while the Interactive Update Client install is marked as GA, it only pushes out to computer groups configured with the **Allow Interactive Update Migration** check box selected, as described in <u>Create a migration computer group</u>.

Notes:

- By default, the Interactive Update Client 2015 R1 or later install doesn't push out to computers in the NON-GROUPED group. However, to push out the Interactive Update Client 2015 R1 or later install to all computers in the NON-GROUPED group, return to the **Machines** page, right-click on the NON-GROUPED group, and select the **Allow Interactive Update Migration** check box.
- Computer groups, including the NON-GROUPED group, that do *not* have the **Allow Interactive Update Migration** check box selected continue to receive updates from Interactive Update Provider 1.0 on the CIC 3.0 server.
- 4. In the **Updates** page data grid, the **Current State** column icon for that Interactive Update Client 2015 R1 or later entry changes to **GA**

The **GA** [<sup>12]</sup> icon indicates that Interactive Update Client 2015 R1 or later is ready to push out to the workstation in the **toMigrate** group according to how you specified to apply updates for your implementation.

**Note:** When the workstation in the **toMigrate** group contacts the Interactive Update Provider 2015 R1 or later on the CIC 2015 R1 or later server, the system adds that workstation to the NON-GROUPED group on the **Machines** page in Interactive Update Provider 2015 R1 or later on the CIC 2015 R1 or later server.

5. Genesys recommends that you monitor the Interactive Update 1.0 Provider **Activity** page on the on the CIC 3.0 server to check for any problems that can occur with applying Interactive Update Client 2015 R1 or later to the workstations in the **toMigrate** group. The following example illustrates that the Interactive Update Client 2.0 failed to update on a computer.

) put	Remove in menu. Remove n	ndividual act nultiple activ	ivity log entry: S ity log entries: T	elect activity lo	g entry and then right-click to d e activity logs entires, press Ctr	isplay a d	context
2	Drag a	column to thi	s area to group	by it.	Search:		_
tivity	Status	Time		Machine	Install	su	Info
	83	10/04/2012.	01:51:09 PM	ZachXp	Interactive Update Client	GA	0
		Date : Time : Machine : Install : SU : Description :	10/04/2012 01:51:09 PM ZachXp Interactive Updat GA	e Client	*		
		The IUpda because t met. The	te Client 2.0 he installati following pr	could not on requirem ograms are have not b	be installed ents were not required by een installed:		

### Client-side notification of the Interactive Update Client 2015 R1 or later installation

Client-side notification of the Interactive Update Client 2015 R1 or later installation (major version upgrade) varies, depending on how you specified to apply updates, and, if applicable, when and how users decide to check for updates. Generally speaking, users see the same messages and toast notifications they are used to seeing for other updates.

If you continue immediately to complete Part 2 of the migration process, depending on how you specified to apply updates, the migrated workstations may receive *all* the necessary updates for the migration to CIC 2015 R1 or later the next time that the Interactive Update Client 1.0 Service checks for updates. In this situation, after the system applies Interactive Update Client 2015 R1 or later to the workstations, Interactive Update Client 2015 R1 or later checks for updates. If any CIC 2015 R1 or later workstation application installs and updates are uploaded to Interactive Update Provider 2015 R1 or later and marked as GA already, as described in Part 2 of the migration process, the system applies them at this time.

Note: If a message appears, indicating that Another program is being installed, it might require one or more logons and manual checks for updates.

## Part 2: Client workstation upgrade tasks on Interactive Update Provider 2015 R1 or later

This section describes the client workstation upgrade tasks on Interactive Update Provider 2015 R1 or later.

#### Computers in Interactive Update Provider 2015 R1 or later on the CIC 2015 R1 or later server

When the workstations in each group that has the **Allow Interactive Update Migration** check box selected contacts the Interactive Update Provider 2015 R1 or later on the CIC 2015 R1 or later server, the system adds those workstations to the default group on the **Groups** page in Interactive Update Provider 2015 R1 or later on the CIC 2015 R1 or later server.

You can choose to group the migrated workstations and any other existing CIC 2015 R1 or later workstations as appropriate for your CIC 2015 R1 or later implementation. For more information about computer groups, see the <u>Interactive Update Technical</u> <u>Reference</u>.

#### Add the latest Interactive Update Client 2015 R1 or later patch as a new update

If you download and apply updates to the CIC server manually, the system doesn't add any updates to Interactive Update Client 2015 R1 or later in Interactive Update Provider 2015 R1 or later on the CIC 2015 R1 or later server. Follow this procedure to add the latest Interactive Update 2015 R1 or later patch as a new update.

**Note:** If you use the PureConnect provider (<u>updates.inin.com</u>) to get updates on the CIC server, the system adds the latest Interactive Update 2015 R1 or later Client patch to Interactive Update Provider. Skip to <u>Add the CIC 2015 R1 or later client</u> <u>workstation application installs and patches as new updates</u>.

#### To add the Interactive Update Client 2015 R1 or later patch as a new update:

- 1. Open Interactive Update Provider 2015 R1 or later on the CIC 2015 R1 or later server and click the Updates page.
- 2. In the Action list box, click Add New Update and then click the arrow [
- 3. In the Add New Update dialog box, click Browse.

Add New Updat	e Product :	Action : 🔣 Add New Up	
Update Properties Add a new update I	by selecting the update using	the Browse button.	at .
File:		Browse	
Command Line Parameters:		▲ ▼	
		OK Cancel	

- 4. In the Choose File to Upload dialog box, browse to the \\I3\CIC\Install\IUpdate\_Client share and then click Open.
- 5. In the CIC\_Update share, select the most recent patch (for example, IUpdateClient\_2015\_R1\_Patch3.msp) and then click Open.

The system adds the path (for example, \\I3\CIC\Install\IUpdate\_Client\IUpdateClient\_2015\_R1\_Patch3.msp) to the File box in the Add New Update dialog box.

Add New Updat	e Action : 🔣 Add New Update
Update Properties Add a new update File: Command Line Parameters:	by selecting the update using the Browse button.  C:\I3\IC\Install\IUpdate_C Browse
	OK Cancel

- 6. Click **OK**. An **Update Info** message shows that the update added successfully.
- 7. Click OK. The Interactive Update Client 2015 R1 or later patch update appears on the Updates data grid, with the pre-Approval [

icon in the Current State column.

#### Add the CIC 2015 R1 or later client workstation application installs and patches as new updates

Note: Starting with CIC 2015 R3, Interaction Desktop replaces Interaction Client .NET Edition as the primary CIC client.

This task consists of:

- Adding the IC User Applications (64-bit) GA install as a new update (major upgrade version) pulled from the UserApps\_64bit share on the CIC 2015 R1 or later server. For more information, see <u>About CIC 3.0 to CIC 2015 R1 or later client workstation</u> upgrade installations.
- Setting a Command Line Parameter ICSERVERNAME to the CIC 2015 R1 or later server name so that users don't have to specify the new Host server name (CIC 2015 R1 or later server) when they first log on to Interaction Desktop.
- Adding the latest IC User Applications (64-bit) patch as a new update, pulled from the UserApps\_64bit share on the CIC 2015 R1 or later server.

#### To add the IC User Applications 64- bit GA install and patch as new updates:

- 1. In the Interactive Update Provider 2015 R1 or later Updates page, click Add New Update.
- 2. In the Add New Update dialog box, click Browse.
- 3. In the Choose File to Upload dialog box, browse to the \\I3\CIC\Install\UserApps\_64bit share and then click Open.
- 4. Select the install (for example, ICUserApps\_64bit\_2015\_R1.msi, GA Install) and then click Open.
- The system adds the path (for example, \\I3\CIC\Install\UserApps\_64bit\ICUserApps\_64bit\_2015\_R1.msi) to the File box in the Add New Update dialog box.
- 5. In the **Command Line Parameters** box, type ICSERVERNAME=*servername*. Genesys recommends using a fully qualified domain name (FQDN), not a short name.

Add New Updat	e Add New Update
Update Properties Add a new update	by selecting the update using the Browse button.
File:	C:\I3\IC\Install\UserApps Browse
Command Line Parameters:	ICSERVERNAME=Qf-Checkers.Qfun.com
	OK Cancel

This action changes a configuration setting on all workstations receiving the IC User Applications install so that users don't have to specify the new Host server name (CIC 2015 R1 or later server) when they first log on to Interaction Desktop.

- 6. Click OK. An Update Info message shows that the IC User Applications 64-bit install added successfully.
- 7. Click **OK**. The IC User Applications (64-bit) GA install appears on the **Updates** data grid, with the **pre-Approval** [

**Note:** The change in the SERVERNAME property to the CIC 2015 R1 or later server name displays in the **Advanced Properties** tab under the data grid in **MSI Properties**.

8. Repeat steps 1 through 7 to add the latest patch (for example, ICUserApps\_64bit\_2015\_R1\_Patch\_1.msp) from the UserApps\_64bit share, with the exception of adding the ICSERVERNAME Command Line Parameter (step 5), which you don't need to repeat.

The IC User Applications (64-bit) SU 1 update appears on the **Updates** data grid, with the **pre-Approval** icon in the **Current State** column.

## Add the Client Language Plugins as new updates

This task consists of adding the Client Language Plugins for the CIC 2015 R1 or later client workstation applications as new updates (major version upgrades), pulled from the appropriate shares on the CIC 2015 R1 or later server.

**Note:** For information about previously installed language files and registry settings, see <u>About CIC 3.0 to CIC 2015 R1 or later</u> <u>client workstation upgrade installations</u>.

#### To add the Client Language Plugins as new updates:

- 1. In the Interactive Update Provider 2015 R1 or later Updates page, click Add New Update.
- 2. In the Add New Update dialog box, click Browse.
- 3. In the Choose File to Upload dialog box, browse to the \\I3\CIC\Install\UserApps\_64bit share and then click Open.
- 4. Select the LanguagePlugins directory and then click Open.

Ehoose File to Upload				×
😋 🗇 🖓 🗕 Local Disk	(C:) ▼ I3 ▼ IC ▼ Install ▼ UserApps_64bit ▼	🔻 🐼 Sear	ch UserApps_64bit	2
Organize 🔻 New folder				1 0
☆ Favorites	Name *	Date modified	Туре	Size
🧮 Desktop	鷆 backup	2/15/2013 12:40 PM	File folder	
Downloads	퉬 LanguagePlugins	2/14/2013 3:25 PM	File folder	
🕍 Recent Places	🛃 ICUserApps_64bit	11/2/2011 9:15 AM	Windows Installer P	108,14
🔚 Libraries	ICUserApps_64bit_LANG_de.mst	3/15/2012 9:27 AM	MST File	8
Documents	ICUserApps_64bit_LANG_es.mst	3/15/2012 9:26 AM	MST File	8
J Music	🛃 ICUserApps_64bit_SU1	3/15/2012 9:39 AM	Windows Installer P	75,79
Pictures	E Setup	3/15/2012 3:57 AM	Application	1,25
💾 Videos				
🖳 Computer				
👽 Network				
	•			
File n	ame:	I All Fi	les (*.*) Open Can	Cel

5. In the LanguagePlugins directory, select the appropriate language (for example, IC User Applications German Language Plugin ICUserApps\_LanguagePlugin\_de\_2015\_R1.msi) and then click Open.
The sustained double activity of the sustained of the sustain

The system adds the path (for example,

\\I3\CIC\Install\UserApps\_64bit\LanguagePlugs\ICUserApps\_LanguagePlugin\_de\_2015\_R1.msi) to the File box in the Add New Update dialog box.

- 6. Click OK. An Update Info message shows that the IC User Applications German LanguagePlugin install added successfully.
- 7. Click OK.
- 8. Repeat steps 5 through 7 to add another language (for example, IC User Applications Spanish Language Plugin install, ICUserApps\_LanguagePlugin\_es\_2015\_R1.msi) as a new update. The two Language Plugin installs appear on the

Updates data grid, with the pre-Approval [

#### Mark the installs and SUs as GA and push out to client workstations

In the final task on the CIC 2015 R1 or later server, mark the Interactive Update 2015 R1 or later patches and CIC 2015 R1 or later client workstation installs and patches as GA and push them out to workstations according to how you specified to apply updates for your implementation.

#### To mark the installs and SUs as GA and push out to client workstations:

- 1. In the Interactive Update Provider 2015 R1 or later **Updates** page, select all the installs and updates, right-click, and then select **Change Current State -> Mark as 'GA'**.
- 2. In the Updates page data grid, the Current State column icon for the installs and updates changes to GA [2].

The **GA** icon indicates that the installs and updates to workstations apply according to how you specified to apply updates for your implementation.

# Client-side notification of the Interactive Update 2015 R1 or later patch and CIC 2015 R1 or later client workstation installation

Client-side notification of the Interactive Update Client 2015 R1 or later installation (major version upgrade) varies, depending on how you specified to apply updates, and, if applicable, when and how users decide to check for updates. Generally speaking, users see the same messages and toast notifications they are used to seeing for other updates.

If you continue immediately to complete Part 2 of the migration process, depending on how you specified to apply updates, the migrated workstations may receive *all* the necessary updates for the migration to CIC 2015 R1 or later the next time that the Interactive Update Client 1.0 Service checks for updates. In this situation, after the system applies Interactive Update Client 2015 R1 or later workstations, Interactive Update Client 2015 R1 or later checks for updates. If any CIC 2015 R1 or later workstation application installs and updates are uploaded to Interactive Update Provider 2015 R1 or later and marked as GA, as described in Part 2 of the migration process, the system applies them at this time.

Note: If a message appears, indicating that Another program is being installed, it might require one or more logons and manual checks for updates.

## Migrate CIC 3.0 Workstations Using Setup.exe

Note: Genesys hasn't updated most of this section for 2015 R1 or later.

This section describes how to migrate/upgrade CIC 3.0 SU 14 or later client workstation applications to CIC 2015 R1 or later by running Setup.exe from the appropriate workstation application share on the CIC server. The procedure includes migrating/upgrading localized versions of CIC 3.0 client workstation applications.

## About Setup.exe

Setup.exe is available in each of the CIC client workstation application shares on the CIC 2015 R1 or later server created during the CIC 2015 R1 or later server installation. For a detailed explanation of workstation application share directory contents, see "Client Workstation Installations" in the <u>PureConnect Installation and Configuration Guide</u> or "CIC Language Pack Client Workstation Installation" in the <u>CIC Language Pack Technical Reference</u> in the <u>PureConnect Documentation Library</u>.

Setup.exe installs CIC client workstation applications manually on *individual client workstations*. Use Setup.exe to:

- Complete a new CIC client workstation application installation (.msi) or apply the latest CIC client workstation release component (.msi).
- Install multiple Client Plugins (.msi) for the CIC client workstation application or apply the latest Client Plugin release components (.msi).
- Provide a localized CIC client workstation application install GUI.

## IC User Applications (32-bit and 64-bit)

This section describes how to upgrade CIC 3.0 User Applications to CIC 4.0 using Setup.exe.

## IC User Applications (32-bit and 64-bit) requirements

- Ensure that you fulfilled the CIC 4.0 client workstation software requirements as described in Workstation Migration Planning.
- Ensure that you reviewed Changes to IC User Applications in CIC 4.0.
- Ensure that the person installing IC User Applications has administrative permissions on the local computer and other permissions.
- Close Microsoft Outlook and any other applications running on the workstation and turn off virus scanning.

## **Upgrade Interactive Update Client**

This section describes how to run Setup.exe to upgrade Interactive Update 1.0 to Interactive Update 2.0 SU 3.

**Note:** After you upgrade Interactive Update using Setup.exe, you can choose to upgrade IC User Applications and the other CIC client workstation applications using Interactive Update or you can update them using Setup.exe as described in this section.

#### To upgrade Interactive Update Client:

- 1. Click Start.
- 2. In Search programs and files, type \\servername\ where servername is the CIC 4.0 server name, to view the shares on the CIC server.
- 3. Double-click the Interactive Update Client install share  ${\tt IC\_IUpdate}$  in the list.

				x
🔾 🗢 🖳 ד Ne	etwork 🕨 qf-checkers 🕨	- 4	Search qf-checkers	٩
<u>File E</u> dit <u>V</u> iew	Tools <u>H</u> elp			
Organize	arch active directory Network a	nd Sharing Center	» 🔠 🕶 🗖 🕼	
	A A		Community (	-
🔆 Favorites	Name	туре	Comments	
	🎍 AttendantFaxes	Share	Interaction Attendant Faxes	
🥽 Libraries	🎍 AttendantWaves	Share	Interaction Attendant Waves	
📄 Documents	🌉 IC_BusinessManagerApps	Share	IC Business Manager Install	
🎝 Music	🚇 IC_Docs	Share	Documentation for the IC Server	
📔 Pictures	🚇 IC_IceLibSDK	Share	IceLib SDK Install	
🔣 Videos	🚇 IC_IUpdate	Share	IC IUpdate	
	🚇 IC_Reports	Share	IC Reports	
📜 Computer	iputer 📃 IC_ServerManagerApps Share IC Server Manager Install			
	🚇 IC_UserApps_32bit	Share	IC User Applications Install (32-bit)	
📬 Network	🚇 IC_UserApps_64bit	Share	IC User Applications (64-bit) Install	
	🌉 IC_WebServicesChat	Share	Chat files for WebServer	
	🌉 IC_WorkstationPreReqs	Share	Third Party Installs	
	🌉 Resources	Share	IC Resources Folder	
	🌉 Users	Share		
IC IUpda	ate (\\qf-checkers) Offline availabi	lity: Not available		
Share Share	Offline sta	tus: Online		
1 item selected				ał

4. Review the contents of the IC\_IUpdate share.

				- • •
😋 🔾 🗢 👱 🕨 Network	▶ qf-checkers ▶ IC_IUpdate ▶	<b>- - - - + - + - + - + - + - + - + + + + + + + + + +</b>	Search IC_IUpdate	ې
Organize 🔻 🖬 Open	New folder			: • 🔟 🔞
쑭 Favorites	Name	Date modified	Туре	Size
🧮 Desktop	🕌 backup	3/6/2013 5:00 PM	File folder	
🐌 Downloads	🛃 IUpdateClient	11/14/2011 4:37 PM	Windows Installer	20,712 KB
🗐 Recent Places	IUpdateClient_LANG_ar.mst	1/9/2013 11:05 AM	MST File	60 KB
	IUpdateClient_LANG_de.mst	1/9/2013 11:05 AM	MST File	68 KB
词 Libraries	IUpdateClient_LANG_es.mst	1/9/2013 11:05 AM	MST File	64 KB
Documents	IUpdateClient_LANG_fr.mst	1/9/2013 11:05 AM	MST File	64 KB
🌙 Music	IUpdateClient_LANG_he.mst	1/9/2013 11:07 AM	MST File	60 KB
Pictures	IUpdateClient_LANG_it.mst	1/9/2013 11:07 AM	MST File	64 KB
🦉 Videos	IUpdateClient_LANG_ja.mst	1/9/2013 11:07 AM	MST File	64 KB
	IUpdateClient_LANG_ko.mst	1/9/2013 11:07 AM	MST File	56 KB
👰 Computer	IUpdateClient_LANG_nl.mst	1/9/2013 11:09 AM	MST File	64 KB
	IUpdateClient_LANG_no.mst	1/9/2013 11:09 AM	MST File	60 KB
🙀 Network	IUpdateClient_LANG_pl.mst	1/9/2013 11:09 AM	MST File	64 KB
	IUpdateClient_LANG_pt-br.mst	1/9/2013 11:09 AM	MST File	64 KB
	IUpdateClient_LANG_ru.mst	1/9/2013 11:10 AM	MST File	60 KB
	IUpdateClient_LANG_sr.mst	1/9/2013 11:10 AM	MST File	60 KB
	IUpdateClient_LANG_sv.mst	1/9/2013 11:10 AM	MST File	60 KB
	IUpdateClient_LANG_tr.mst	1/9/2013 11:11 AM	MST File	60 KB
	IUpdateClient_LANG_zh-hans.mst	1/9/2013 11:12 AM	MST File	48 KB
	IUpdateClient_LANG_zh-hant.mst	1/9/2013 11:12 AM	MST File	48 KB
	IUpdateClient_SU2	3/7/2013 9:23 AM	Windows Installer	25,120 KB
	Setup	8/22/2012 9:11 PM	Application	1,676 KB
Setup Dat	te modified: 8/22/2012 9:11 PM Dat	te created: 8/22/2012 0:11	PM	
Application	Size: 1.63 MB Offline a	vailability: Not available		

In this example, the IC\_IUpdate share contains:

- Backup directory
- IUpdate\_Client.msi install
- IUpdate\_Client\_SU3.msp **SU component**
- IUpdate\_Client\_LANG.mst files for all available languages for the Interactive Update Client install UI
- 5. Double-click Setup.exe in the IC\_IUpdate share.
- 6. In the **Setup.exe** dialog box, in the list box, click the language for the Interactive Update Client install to display in and then click **OK**.

Client Install Utility		
Please Select an Installer Languag from the list below	je	
English 💌		
Deutsch		
English		
Español		
Italiano		
Nederlands		
Norsk		
Polski		
Português (Brasil)		
Srpski		
Svenska		
Русский		
עברית		
العربية		
한국민		
日本語		
间14甲艾		
繁體中文		

Unlike the other CIC client workstation applications, all languages supported currently (including English) are available to select.

Note: This dialog box appears only in the initial run of Setup.exe in the IC\_IUpdate share. The next time you run Setup.exe, the Interactive Update Client install appears in the language that you selected the first time you ran Setup.exe.

7. Review the contents of the next **Setup.exe** dialog box.

Client Install Utility	×
- Available Client Plugins	
, All Plugins	
Installation Progress Interactive Update Client is not installed on the system. Select any applicable language plug-ins and then click Start to install Interactive Update Client SU3. The service update is automatically applied as part of the install.	*
Start Exit	

As noted in **Available Client Plugins**, no plugins for Interactive Update Client are available. The reason is because Interactive Update Client does not have associated Client Language Plugins.

As the Installation Progress message indicates, Setup.exe applies the SU (.msp) when it runs the install (.msi), if applicable.

8. Click Start to launch the Interactive Update Client 2.0 install. The Interactive Update Client install starts.

#### 9. On the Welcome page, click Next.

📅 Interactive Update Client Setup		
o00°	Welcome to the Interactive Update Client Setup Wizard The Setup Wizard will install Interactive Update Client on your computer. Click Next to continue or Cancel to exit the Setup Wizard.	
<mark>ଟ୍</mark> ଚ GENESYS <sup>™</sup>		
	Back Next Cancel	

On the Interactive Update Provider Server page, the Interactive Update Provider server box contains the Interactive Update Provider (host CIC 3.0 server) name.

🔡 Interactive Update Client Setup
Interactive Update Provider Server
Please enter the name of the Interactive Update Provider server to which a Connection is desired.
Interactive Update Provider server: 
Back Next Cancel

10. In the **Interactive Update Provider server** box, type the **host CIC 4.0 server** name and then click **Next**. Genesys recommends using a fully qualified domain name (FQDN), not a short name.
| 🛃 Interactive Update Client Setup  |
|--|
| Interactive Update Provider Server   |
| Please enter the name of the Interactive Update Provider server to which a<br>connection is desired. |
|  |
| Interactive Update Provider server:  |
| qf-checkers  |
|  |
|  |
|  |
|  |
|  |
|  |
| Back Next Cancel   |
| Dack Next Canter   |

#### Notes:

- If you have a CIC Switchover architecture and you created a pair of commonly named DNS A records pointing to each server as part of the IP phone network configuration for managed phones, do not use that common name value here. Instead, use one of the actual CIC server names. Genesys recommends using a fully qualified domain name (FQDN), not a short name.
- After you complete this installation, verify the fully qualified domain name (FQDN) resolution to ensure client connectivity with the host CIC server. For more information, see <u>Verify FQDN resolution (IC User Applications)</u>.

11. When you are ready to begin the installation, click Install.

🔡 Interactive Update Client Setup	- • •
Ready to install Interactive Update Client	00°
Click Install to begin the installation. Click Back to review or change any of yo installation settings. Click Cancel to exit the wizard.	our
Back Install	Cancel

As the installation continues, a status bar indicates the progress.

As part of this process, the install uninstalls the Interactive Update 1.0 components before installing the 2.0 version of the components.

12. On the Completed Interactive Update Client Setup page, click Finish.

🛃 Interactive Update Client Se	etup 🗖 🗖 🗾 🗖
o00°	Completed the Interactive Update Client Setup Wizard Click the Finish button to exit the Setup Wizard.
<mark>ଟ୍</mark> ଟ GENESYS <sup>™</sup>	
	Back Finish Cancel

13. On the Setup.exe page, review the Installation Progress message and then click Exit to close Setup.exe.

Client Install Utility	×
- Available Client Plugins	
All Plugins	
Installation Progress	
plug-ins and then click Start to install Interactive Update Client SU3. The service update is automatically applied as part of the install.	^
Finished processing installs for client workstation applications and selected language plug- ins, if applicable.	•
Start Exit	

14. When asked to restart the computer, click Yes.

Immediately following the restart, the Interactive Update Client service looks for any PureConnect products or components installed on the workstation.



It displays one of the following notices:

- Your PureConnect software is currently up to date: This message indicates that no updates were available. If this message appears, proceed to the next step.
- A PureConnect software update is ready to be installed. Please click here to begin: This message indicates that more updates are available. If this message appears, click the message to open a wizard that walks you through the process of downloading and applying the updates. The computer might require a restart. Ensure that all updates downloaded and applied before proceeding to the next step.

You can choose to upgrade IC User Applications and the other CIC client workstation applications using Interactive Update or proceed to update them manually using Setup.exe as described in the following sections.

#### Upgrade IC User Applications

**Note:** The current migration package requires CIC 4.0 SU 3 on the CIC server and workstations. Genesys hasn't updated this example scenario for this requirement.

This section describes how to run Setup.exe to upgrade CIC 3.0 User Applications to CIC 4.0 SU 1 with German and Spanish languages installed.

#### To upgrade IC User Applications:

- 1. On the client workstation, click Start.
- 2. In Search programs and files, type \\servername\ where servername is the CIC 4.0 server name, to view the shares on the CIC server.

3. Double-click the IC User Apps install share appropriate for the workstation from the list, for example IC\_UserApps\_64-bit.

😋 🔾 🗢 💻 🕨 Network	▶ qf-cael ▶		✓  Search qf-cae1	م ر	>
Organize ▼ Search active directory Network and Sharing Center View remote printers 🗄 ▼ 🗍 🕡					
🚖 Favorites	Name	Туре	Comments		
📃 Desktop	🎍 AttendantFaxes	Share	Interaction Attendant Faxes		
鷆 Downloads	🌺 AttendantWaves	Share	Interaction Attendant Waves		
🕮 Recent Places	🌺 IC_BusinessManagerApps	Share	IC Business Manager Install		
	🌺 IC_Docs	Share	Documentation for the IC Server		
🥽 Libraries	🌺 IC_IceLibSDK	Share	IceLib SDK Install		
📄 Documents	🌺 IC_Reports	Share	IC Reports		
🎝 Music	🌺 IC_ServerManagerApps	Share	IC Server Manager Install		
📔 Pictures	🌺 IC_UserApps_32bit	Share	IC User Applications Install (32-bit)		
🛃 Videos	🚇 IC_UserApps_64bit	Share	IC User Applications (64-bit) Install		
	🌺 IC_WebServicesChat	Share	Chat files for WebServer		
🌉 Computer	🌺 IC_WorkstationPreReqs	Share	Third Party Installs		
	🌺 Resources	Share	IC Resources Folder		
🗣 Network					
IC_UserApps_64bit (\\qf-cae1) Offline availability: Not available Share Offline status: Online					

4. Review the contents of the IC User Apps install share, for example, IC\_UserApps\_64-bit, and the LanguagePlugins subdirectory.



In this example, the IC\_UserApps\_64bit share contains:

• Backup directory

- Language Plugins directory: Contains German and Spanish ICUserApps\_LanguagePlugin\_de.msi and ICUserApps\_LanguagePlugin\_es.msi installs
- The ICUserApps\_64bit.msi install
- The ICUserApps\_64bit\_SU1.msp SU component
- German and Spanish localized strings ICUserApps\_LanguagePlugin\_de.mst and ICUserApps\_64bitLanguagePlugin\_es.mst for the IC User Apps install GUI
- The Setup.exe utility
- 5. Double-click Setup.exe in the IC User Apps install share.
- 6. In the **Setup.exe** dialog box, in the list box, click the language that you want the IC User Applications install to display in and then click **OK**.

Localized Setup	×
Please Select an Installer Language from the list below	
English 🗨	
Deutsch	
English	
Español	
Español	

The Language Packs installed on the CIC server determine the languages displayed in the list box. (The list always includes English.) In this example, since the German and Spanish Language Packs are installed on the CIC server, English, German, and Spanish are available to select.

**Note:** This dialog box appears only in the initial run of Setup.exe in the IC User Apps install share. The next time you run Setup.exe, the IC User Applications install automatically appears in the language you selected the first time you ran Setup.exe.

7. Review the contents of the next Setup.exe dialog box.

Localized Setup	x
Available Client Language Plugins	
<ul> <li>✓ German Plugin for IC User Applications</li> <li>✓ Spanish Plugin for IC User Applications</li> </ul>	
All Languages	
Installation Progress IC User Applications (64-bit) is not installed on the system. Select any applicable language plug	ī-i
4	
OK Exit	

In the CIC 3.0 to CIC 4.0 migration scenario, Setup.exe detects any localized versions of IC User Applications installed previously and pre-selects them in the **Available Client Language Plugins** box. In this example, the 3.0 German and Spanish versions of IC User Applications are installed and pre-selected.

After Setup.exe starts the 4.0 IC User Applications (64-bit) install, the install uninstalls the 3.0 version of the application. For more information, see <u>About CIC 3.0 or CIC 2015 R1 or later client workstation upgrade installations</u>.

#### Notes:

- If you de-select a pre-selected Client Language Plugin, the localized 3.0 version of IC User Applications uninstalls, but the 4.0 version doesn't install. You must re-run Setup.exe to install the 4.0 version.
- Genesys doesn't recommend selecting the **All Languages** check box. (If selected, the localized 3.0 versions of IC User Applications uninstall, but the 4.0 versions don't install. You must re-run Setup.exe to install the 4.0 versions.)
- If you have a localized 3.0 version of IC User Applications installed but the 4.0 Language Pack is not available or not installed on the CIC 4.0 server, Setup.exe uninstalls the localized 3.0 version. You must re-run Setup.exe to install the 4.0 version, when available.
- 8. Click OK to start the 4.0 IC User Applications (64-bit) install.
- 9. On the **Welcome** page, click **Next**.

📸 IC User Applications (64-bit	t) Setup 📃 🗖 🗾 🗖
o0°	Welcome to the IC User Applications (64-bit) Setup Wizard for IC 4.0 The Setup Wizard will install IC User Applications (64-bit) on your computer. Click Next to continue or Cancel to exit the Setup Wizard.
<mark>ଟ୍</mark> ଚ GENESYS <sup>™</sup>	
	Back Next Cancel

**Note:** If you are migrating from CIC 2.3.x/2.4 to CIC 3.0, the **Remove Previously Installed Client Applications** page appears. Click **Next** to remove the older application versions.

10. On Custom Setup page, select or clear applications/features as needed and then click Next.

😸 IC User Applications (64-bit) Setup	
<b>Custom Setup</b> Select the way you want features to be installed.	o
Click the icons in the tree below to change the way features will	be installed.
Interaction Client Interaction Client .NET Edition Additional Features X  Outlook Dialing SIP Soft Phone Interaction Screen Recorder Capture Client Interaction Voicemail Player Interaction Fax	Select Interaction Client Edition and additional client features. This feature requires 0KB on your hard drive. It has 1 of 2 subfeatures selected. The subfeatures require 149MB on your hard drive.
Location: C:\Program Files (x86)\Interactive Intellige	nce\ Browse
Reset Disk Usage Back	Next Cancel
<ul> <li>Notes:</li> <li>On a Windows 7 workstation, if you already had SIP Soft Plinstalled, or if you want to install them now, enable one or</li> </ul>	hone, Interaction Screen Recorder Capture Client, or both of these applications on the Custom Setup page.

- On a Windows XP workstation, SIP Soft Phone and Interaction Screen Recorder Capture Client are not available in the Custom Setup page because Windows XP doesn't support them.
- Genesys recommends that you keep the default location to install the IC User Applications as C:\Program Files(x86)\Interactive Intelligence. To change the default location, click Browse.
- 11. If you selected **SIP Soft Phone**, **Interaction Screen Recorder Capture Client**, or both on the **Custom Setup** page, the **QoS Requirement** page appears.

🔡 IC User Applications (64-bit) Setup	• •
<b>QoS Requirement</b> Please select a QoS option below.	00°
Select a QoS option from the two choices below. A feature chosen for the installation requires QoS. We recommend selecting "Interactive Intelligence QoS driver" to install the driver included with this installation package. If specifically instructed by your administrator, you may select "Other" indicating another form of QoS is already installed on this computer.	
๏ Interactive Intelligence QoS driver (Recommended) ⊘ Other	
Back Next	Cancel

**PureConnect QoS driver:** This option is the default and recommended option. If selected, the install adds the Interactive Intelligence certificate to the Trusted Publishers list and then installs the driver. In most cases, adding the certificate to the Trusted Publishers list keeps the user from having to trust the certificate manually.

**Other:** If selected, the system doesn't add the PureConnect certificate to the Trusted Publishers list and doesn't install the driver. Genesys recommends that you do not select this option unless the administrator instructs you to select it. Selecting this option implies use of another form of QoS at the site.

If the system administrator does not allow you to modify the Trusted Publishers list, the **Windows Security** page appears. The page displays a message, explaining what to do.

**For more information** about the PureConnect QoS driver, see KB article: <u>https://my.inin.com/Support/Pages/KB-Details.aspx?EntryID=Q131006915300479</u>.

On the CIC Server Name page, the CIC Server Name box contains the host CIC 3.0 server name.

🗒 IC User Applications (64-bit) Setup	- • <b>-</b>
IC Server Name Please enter the name of the IC Server to which a connection is desired.	00°
IC Server Name: gf-cae6	
Back	Cancel

12. In the box, type the **host CIC 4.0 server** name and then click **Next**. Genesys recommends using a fully qualified domain name (FQDN), not a short name.

😸 IC User Applications (64-bit) Setup	- • <b>X</b>
IC Server Name Please enter the name of the IC Server to which a connection is desired.	00
IC Server Name: [qf-cae1]	
Back Next	Cancel

#### Notes:

- If you have a CIC Switchover architecture and you created a pair of commonly named DNS A records pointing to each server as part of the IP phone network configuration for managed phones, do not use that common name value here. Instead, use one of the actual CIC server names. Genesys recommends using a fully qualified domain name (FQDN), not a short name.
- After completing this installation, verify fully qualified domain name (FQDN) resolution to ensure client connectivity with the host CIC server. For more information, see <u>Verify FQDN resolution (IC User Applications)</u>.
- 13. When you are ready to begin the installation, click **Install**.

🛃 IC User Applications (64-bit) Setup	
Ready to install IC User Applications (64-bit)	00°
Click Install to begin the installation. Click Back to review or change any o installation settings. Click Cancel to exit the wizard.	of your
Back	Cancel

As the installation continues, a status bar indicates the progress.

😸 IC User Applications (64-bit) Setup	- • •
Installing IC User Applications (64-bit)	00°
Please wait while the Setup Wizard installs IC User Applications (64-bit).	
Status: Copying new files	
Back Next	Cancel

As part of this process, the install uninstalls the 3.0 IC User Applications components. For more information, see <u>About CIC</u> <u>3.0 to CIC 2015 R1 or later client workstation upgrade installations</u> in <u>Workstation Migration Planning</u>.

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

🔡 IC User Applications (64-bit	) Setup 📃 🖃 🗾 💌
o00	Completed the IC User Applications (64-bit) Setup Wizard Click the Finish button to exit the Setup Wizard.
<mark>ଟ୍</mark> ଟ GENESYS <sup>™</sup>	
	Back Finish Cancel

15. On the Setup.exe page, review the Installation Progress messages and then click Exit to close Setup.exe.

Localized Setup	
Available Client Language Plugins	
<ul> <li>✓ German Plugin for IC User Applications</li> <li>✓ Spanish Plugin for IC User Applications</li> </ul>	
All Languages	
Installation Progress	
Installing German Plugin for IC User Applications Installing Spanish Plugin for IC User Applications Finished processing installs for client workstation applications and selected language plug-in Finished processing installs for client workstation applications and selected language plug-in	
OK Exit	

You can start the IC User Applications from links on the desktop or from Start -> Programs -> Interactive Intelligence.

**Note:** Since the CIC server name changed from the CIC 3.0 server to the CIC 4.0 server as part of the IC User Applications installation, links to user applications may point to the CIC 3.0 server. Specifying the correct credentials when logging on to these applications the first time after the upgrade should resolve the problem.

#### Verify FQDN resolution (IC User Applications)

The network administrator completes the following procedure to verify fully qualified domain name (FQDN) resolution to ensure client connectivity with the host CIC server. You can complete this simple procedure at any point after the host CIC server has joined to the domain. If the CIC servers are part of a Switchover pair, verify FQDN resolution from a workstation for both servers.

- 1. In a command window from the workstation, ping the short name of the host CIC server.
- 2. Obtain the IP address from the ping and run an  ${\tt NSlookup}$  on the IP address.

If the client fails to connect to a host CIC server, you can also do this procedure as a troubleshooting step to rule out FQDN.

# **IC Business Manager Applications**

The IC Business Manager Applications installation program installs IC Business Manager and Interaction Fax Cover Page Editor on Windows 7 supervisor workstations. (IC Business Manager Applications are not supported on Windows XP.)

#### **IC Business Manager Applications requirements**

- Ensure that you fulfilled the CIC 4.0 client workstation software requirements as described in Workstation Migration Planning.
- Ensure that the person installing IC Business Manager Applications has administrative permissions on the local computer and other permissions.
- Close Microsoft Outlook and any other applications running on the workstation and turn off virus scanning.

#### **Upgrade IC Business Manager Applications**

Upgrading IC Business Manager Applications is similar to upgrading IC User Applications. Follow the instructions in <u>Upgrade IC</u> <u>User Applications</u> with the following specifics for IC Business Manager Applications:

- On the client workstation, select Start. In Search programs and files, type \\servername\CIC\_BusinessManagerApps, where servername is the CIC 4.0 server name. Click Setup.exe to launch the IC Business Manager Applications install.
- On the **Custom Setup** page, all applications are selected by default. Clear any applications that you don't want to install.

🗒 IC Business Manager Applications Setup	- • •	
Custom Setup Select the way you want features to be installed.	00	
Click the icons in the tree below to change the way features will be installed.		
Interaction Fax Cover Page Editor IC Business Manager Applications	Design Interaction Fax cover pages and edit standard templates available to users. This feature requires 48MB on your hard drive.	
Location: C:\Program Files (x86)\Interactive Intelligence\		
Reset Disk Usage Back	Next Cancel	

Note: CIC 4.0 includes Interaction Supervisor in IC Business Manager Applications.

#### Install Interactive Update Client (IC Business Manager Applications)

If you haven't installed Interactive Update Client on the workstation where you have IC Business Manager Applications installed, install it now. For more information, see <u>Upgrade Interactive Update Client</u>.

#### Verify FQDN resolution (IC Business Manager Applications)

After installing the IC Business Manager Applications, follow the instructions in Verify FQDN resolution (IC User Applications).

#### **IC Server Manager Applications**

The IC Server Manager Applications installation program installs IC Server Manager, Interaction Administrator, Interaction Attendant, Interaction Designer, IC System Manager, Interaction Host Recorder Client, and Interaction SOAP Tracer administrator applications on Windows 7 workstations. (IC Server Manager Applications are not supported on Windows XP.)

#### **IC Server Manager Applications requirements**

- Ensure that you fulfilled the CIC 4.0 client workstation software requirements as described in Workstation Migration Planning.
- Ensure that the person installing IC Server Manager Applications has administrative permissions on the local computer and other permissions.
- Close Microsoft Outlook and any other applications running on the workstation and turn off virus scanning.

# **Upgrade IC Server Manager Applications**

Upgrading IC Server Manager Applications is similar to upgrading IC User Applications. Follow the instructions in <u>Upgrade IC User</u> <u>Applications</u> with the following specifics for IC Server Manager Applications:

- On the client workstation, select Start. In Search programs and files, type \\servername\CIC\_ServerManagerApps, where servername is the CIC 4.0 server name. Click Setup.exe to start the IC Server Manager Applications install.
- On the **Custom Setup** page, all applications are selected by default. Clear any applications that you don't want to install.

🗒 IC Server Manager Applications Setup	- • •
Custom Setup Select the way you want features to be installed.	oo
Click the icons in the tree below to change the way features will b	be installed.
Interaction Designer         Interaction Administrator         Interaction Attendant         Interaction Host Recorder Client         Interaction SOAP Tracer	IC Server Manager. This feature requires 187MB on your hard drive.
Location: C:\Program Files (x86)\Interactive Intelligence\	
Reset Disk Usage Back	Next Cancel

## Install Interactive Update Client (IC Server Manager Applications)

If you haven't installed Interactive Update Client on the workstation where you have IC Server Manager Applications installed, install it now. For more information, see <u>Upgrade Interactive Update Client</u>.

#### Verify FQDN resolution (IC Server Manager Applications)

After installing the IC Server Manager Applications, follow the instructions in Verify FQDN resolution (IC User Applications).

# **Appendixes**

# **Appendix A: Guidelines for Creating Your Migration Environment**

After you review the migration tasks described in this guide, consider these guidelines for creating a migration environment for your own implementation. The guidelines are based on pre-release testing of the CIC 2.4/3.0 to CIC 4.0 migration package at various beta sites.

These are guidelines, not requirements. Most importantly, the guidelines provide reasonable fall-back strategies for various stages of the migration process.

# **Development environment**

Genesys recommends 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.

A proper development environment should mirror the production environment's licensing, installation, and configuration. At a minimum, your development environment should have a CIC server, an Interaction Media server, a database, and some phones. If your CIC implementation currently includes off-server Session Manager, Interaction Recorder Extreme Query Server, and/or other additional servers, consider including them in your development environment also.

# Virtualized development environment recommended

Genesys recommends that you use virtual computers in your development environment, regardless of whether you intend to use them in your production environment,

Each stage of the migration process depends on the completion and verification of the previous stages. Create the first base snapshot when you first install CIC 2015 R1 or later. Create more snapshots as you verify each stage of the migration.

As long as you maintain stable and tested base images of your development computers, you can revert back as needed when encountering issues.

**Note:** The migration tools have no *rollback* functionality. A virtualized development environment and computer imaging is the best way to avoid wasted efforts reinstalling and reconfiguring servers after encountering errors.

# Development database

The CIC database schema has undergone dramatic changes in CIC 4.0. For this reason, it requires its own migration process from the existing database to a new, empty CIC 2015 R1 or later database.

Genesys recommends following these guidelines for the development database migration. As stated previously, take snapshots of the development database as you progress.

- Prepare for and migrate the database using the CIC Database Migration Assistant as described in this guide. Plan for enough disk space to hold all the data to migrate. As various table groups migrate, errors can arise because of inconsistent or missing source data. Correct these issues in the source data before you complete the database migration. Expect to run the CIC Database Migration Assistant multiple times as issues arise. CIC Database Migration Assistant can recover from errors in previous migration attempts. However, in extreme circumstances you might need to revert the database and restart the migration.
- Once the source data migration completes successfully, **review all reporting data to ensure the accuracy of the migrated data**. All the views that support CIC 3.0 reports carried forward to CIC 2015 R1 or later, albeit with different underlying queries. This action allows for a side-by-side audit of the two datasets. Check the data for completeness and correctness. If you encounter issues, you might need to revisit the migration entirely. Once you verify all the data on the migrated development database, back it up for future use as a restore point.
- Once you verify all the standard reports, **test any custom reports or other custom features that use the database**. You might need to create custom tables and query the data manually from the original database using the link that the migration process created. You might need to redevelop custom reports or extensions that interact directly with the database or call stored procedures that are part of the CIC schema.

# **Development CIC server**

Genesys recommends several development/testing tasks beyond the import of configuration data from the existing CIC server. Interaction Migrator pulls configuration from Directory Services, and resource files and handlers. It is necessary to test all these things in the 4.0 environment.

Genesys recommends following these guidelines for the development CIC server migration. Take snapshots of the development CIC server as you progress.

- Prepare for and import the CIC configuration data from the existing CIC server using Interaction Migrator as described in this guide. Interaction Migrator imports all system settings, adds users, workgroups, roles, lines, dial plans, attendant profiles, and others. The Interaction Migrator import also converts and adds audio resource files, such as prompts. There is an option to import custom handlers at this time also. After the import, complete an audit of the system configuration in Interaction Administrator against the existing source server.
- Once you are satisfied that the settings on the development CIC server are correct, **install a test client workstation and complete some basic interaction testing**. It is helpful to have a test number that you can point to the server for this testing. If you use Exchange-based messaging, disable those workgroups or mailboxes so as not to queue emails to the development CIC server. This represents the best point to take a snapshot of the development CIC server. If you cannot fix any of the issues that you find with simple configuration changes, you might need to revert to the pre-import image of the server, and re-evaluate the export.
- Once the development CIC server is functional, **continue testing and correcting issues**. At this point, it is unlikely for a change to the export file to yield different results. Take careful notes about changes needed post-migration once you migrate to the production CIC server. Following are items to consider. As you progress through this list, take snapshots of the development CIC server as needed.
  - **Prompts** Are all prompts in place and playable? The prompts convert to a new codec, if necessary, during import. Check for issues and consider recopying prompt files, if necessary.
  - Attendant Profiles Are all profiles present and operable? If not, correct profiles and steps to move forward.
  - **Dial Plans** Use the dial plan simulator to verify that dialing patterns use the proper lines as configured.
  - **Permissions** Permissions are more granular in CIC 2015 R1 or later and the interface is quite different. Review permissions for users, groups, and roles against those on the existing source server and requirements for site security. Change the settings as necessary.
  - Handlers Verify that all base handlers copied over correctly, and custom handlers if you selected the option to import them. Copy files over manually as needed.
  - Certificates Check for valid certificates to remote subsystems, and run GenSSLCerts as necessary to correct them.
  - Add On Applications Interaction Recorder is a very complex migration. Review the migrated recorder configuration and change the policies as needed. You might need to check other add-on applications, depending on what you installed.
  - **Reports** Audit the CIC reports to ensure that proper historical data is in place. If any custom reports reference CIC tables directly, rework them to fit the new schema.
  - Custom applications Test custom applications and extensions to ensure compatibility with the new environment.

# Other servers in the development environment

Replicate other servers that exist in your production environment to the development environment. Install off-server Session Manager, Interaction Remote Content Servers, and ASR servers as needed and verify that each of these components is functional. As you wrap up this stage, you should have a replica of your existing production environment with CIC 2015 R1 or later components. Test as necessary, and take snapshots as needed.

# Migrating to the production environment

The ideal migration to the production environment is to move from the development environment that you just verified in the following sequence. This sequence provides the safest possible transition path. Any issues encountered during the migration are accounted for in the development environment.

- Create a new CIC 2015 R1 or later database for production and run the database migration from the source database. This step ensures that the data moved is up to date with recent activity on the server. Most issues encountered during the development phase of the migration relate to problems in the source data. Resolved these issues at this point to allow a clean database migration to the production database.
- Use Interaction Migrator to take a complete export of the development CIC server. On the production system, complete a restore operation using the exported development CIC server data file.
- To ensure that user configuration is up to date, take a new export from the existing source server of the user, workgroup, and role data so that the production system is as current as possible for this data.
- Import this second configuration file onto the production server and test as necessary, correcting issues as they arise.

When installing CIC 2015 R1 or later client applications for end users, consider keeping some CIC 3.0 workstations available in case issues arise that you cannot correct immediately. Also, consider installing Interaction Web Client in the CIC 3.0 environment to give users a fall back as they cannot connect to the old production server once their Interaction Client is updated to CIC 2015 R1 or later.

# **Appendix B: Interaction Recorder Post-Migration Results**

After you review the migration tasks described in this guide, and the steps required to migrate Interaction Recorder configuration data, consider the post-migration effects on Interaction Recorder. These results provide you with important information for evaluating and adapting to your Interaction Recorder configuration environment after migration.

# CIC 3.0 to CIC 2015 R1 or later Interaction Recorder conversion results in Interaction Administrator

This section describes Interaction Recorder results in Interaction Administrator, and Interaction Recorder Policy Editor, after migrating CIC 3.0 to CIC 2015 R1 or later.

Migrating from CIC 3.0 to CIC 2015 R1 or later creates changes to Interaction Recorder data purging, selection results, category and categorization rules, questionnaires, archives, and Interaction Recorder licensing. As a best practice, Genesys recommends that you familiarize yourself with these changes as you work with Interaction Recorder post-migration.

#### Interaction Recorder base configurations

Interaction Recorder configurations including Recording Generation Settings, Data purging Settings, Processing Settings, Custom Attributes, Automated Archiving settings, and the master key migrate when you export the Interaction Recorder node using Interaction Migrator.

#### **Data purging**

If you enabled **data purging** in CIC 3.0, the migration creates a Retention policy for each category and subcategory. If you enabled **screen recording purging** and didn't select **Same as parent recording**, the migration creates a Retention policy to purge screen recordings.

#### Selection rules

Selection rules in CIC 3.0 convert to Initiation policies in CIC 2015 R1 or later. If a selection rule isn't associated to a user, workgroup, or role, the migration doesn't create an Initiation policy for that rule.

# Category

The migration creates a Retention policy in CIC 2015 R1 or later for the default Category in CIC 3.0. For each root Category, the migration creates a View and an Administrator Security policy. If a Category doesn't have users, workgroups, or roles that can view or administer the Category, the migration doesn't create a Security policy for that Category.

# **Categorization rules**

Categorization rules in CIC 3.0 convert to Retention policies in CIC 2015 R1 or later. If a categorization rule contains a condition not supported in CIC 2015 R1 or later, the migration doesn't create a Retention policy for that rule.

#### Questionnaires

Interaction Recorder questionnaires and completed score cards are in the database, and move to the 4.0 database as part of the Recorder table group migration. Questionnaires in Interaction Administrator in CIC 3.0 are now in IC Business Manager in CIC 2015 R1 or later.

#### Archives

In CIC 2015 R1 or later, archiving occurs by setting up retention policies to move recordings to an alternate storage location after a specified amount of time. The migration process creates retention policies that match the category-driven storage in CIC 2.4 to CIC 3.0. Once the migration is complete, configure storage policies manually to take effect after the main retention policy expires.

#### **Recording attributes**

Custom Recording Attributes migrate from the 3.0 Database to the 4.0 Database. All migrated recordings contain other custom attributes.

#### **Recorder Master Key**

Interaction Recorder has a built-in Master Key file that allows Interaction Recorder to encrypt recordings when you didn't configure a Master Key file. You can also choose to create a more secure, custom-generated Master Key file.

A Master Key securely protects recording keys, which encrypt and decrypt recorded media files. For more security, a Master Key encrypts each recording key. Recording keys generate when creating the media file, and store in the header of each media file. The recording key encrypts and decrypts the recorded media stored in the file.

Interaction Recorder Master Keys in CIC 3.0 convert to Interaction Recorder Master Keys in CIC 2015 R1 or later.

#### Stored recordings and the recordings storage path

If you store Interaction Media Server 3.0 recordings locally on the Media Server 3.0, you can update the recordings storage path in Interaction Recorder Policy Editor. For more information, see <u>Migrate Interaction Media Server</u>.

#### Licensing

In CIC 3.0, the only Interaction Recorder licenses were **Interaction Recorder Access** and **Interaction Recorder Extreme Query**. CIC 2015 R1 or later added two new licenses: **Interaction Recorder Client Access** and **Interaction Recorder Quality Monitoring**.

When you migrate users to CIC 2015 R1 or later, they cannot run the Interaction Recorder module in IC Business Manager without the Interaction Recorder Client Access license. Since this license is new in CIC 4.0, assign the license to the appropriate users after migration. For more information, see the <u>CIC Licensing Technical Reference</u> in the <u>PureConnect Documentation Library</u>.

Also, when you migrate users to CIC 2015 R1 or later, Interaction Recorder continues to apply the CIC 3.0 Interaction Recorder Access license for each user or station to record. For information about licensing recordings, see the <u>Interaction Recorder and</u> <u>Interaction Quality Manager Technical Reference</u> in the <u>PureConnect Documentation Library</u>.

**Note:** If the user or station doesn't have proper licensing for Interaction Recorder, recordings remain encumbered. Encumbered recordings display in a search result in the Interaction Recorder Client search results view when using the "Recording is Encumbered" search attribute. You cannot play back encumbered recordings, and it requires a valid unlock code to unencumber the encumbered recordings on the server.

# Interaction Screen Recorder capabilities and settings

Interaction Screen Recorder adds screen recording capability, which assists contact center managers and supervisors in improving their contact center's productivity and assessing agents' skills. CIC 2015 R1 or later does not require a separate Interaction Screen Recorder Server, as it does with CIC 3.0. Interaction Screen Recorder settings in CIC 3.0 convert to Interaction Screen Recorder settings in CIC 2015 R1 or later 0.

# Interaction Recorder Remote Content Service settings

Interaction Recorder Remote Content Service settings in CIC 3.0 convert to Interaction Recorder Remote Content Service settings in CIC 2015 R1 or later. Interaction Recorder Remote Content Service facilitates the retrieval and storage of both audio and screen recordings in your CIC environment. Interaction Recorder Remote Content Service in CIC 2015 R1 or later replaces Interaction Screen Recorder Capture Server in CIC 3.0. The CIC 2015 R1 or later environment requires a fresh install of the Interaction Recorder Remote Content Service.

For licensing, requirements, and installation and configuration instructions, see the <u>Interaction Recorder Remote Content Service</u> <u>Installation and Configuration Guide</u> in the <u>PureConnect Documentation Library</u>.

# Interaction recordings storage after database migration

Interaction recordings don't move during migration, only the path to the recordings migrate. If recordings are on the CIC server rather than on a network share or SAN, do one of the following manual steps so that Interaction Recorder can access the recordings:

- Create the same path on the CIC 2015 R1 or later server that you used on the CIC 3.0 server and copy the files to the CIC 2015 R1 or later server. Recording paths that contain a drive letter require these steps.
- Create a path on a network share, copy the files to that path, and then change the paths in the Interaction Recorder database to point to the new share.

After completing one of the options, create a Retention Policy with a valid storage location and reapply the Storage Location Retention policy. When the system reapplies the policy, it transfers the existing recordings to the new storage location, since the existing recordings match the location specified in the new storage policy. For more information, see the <u>Interaction Recorder</u> documentation in the <u>PureConnect Documentation Library</u>.

#### Interaction Recorder audit entries

If you select the Interaction Recorder group and specify a date range for migration, the date range governs what set of recordings migrate. Only recordings created within the date range migrate. However, since it is proper that all recording audit entries migrate with a recording, it is possible and correct for audit entries with dates outside the date range to migrate.

For example, if there are 12 recordings in a database, and each recorded on the first of the month for all 12 months of 2010, a migration over the range of April 15, 2010 through September 15, 2010 migrates six recordings (May 1, 2010, June 1, 2010, July 1, 2010, August 1, 2010, and September 1, 2010). If each of those six recordings played on January 1, 2012, the six recordings that migrated include the playback audit entries made on January 1, 2012, even though January 1, 2012 is outside the migration date range.

## Interaction Recorder client searches

Interaction Recorder searches created in IC Business Manager migrate to the 2015 R1 or later database; however, Interaction Recorder client searches don't migrate. Since CIC 2.4 does not have IC Business Manager and only uses Interaction Recorder client searching, no CIC 2.4 Interaction Recorder searches migrate. If you are migrating from CIC 2.4 to CIC 2015 R1 or later, re-implement your searches in CIC 2015 R1 or later.

#### Interaction Recorder Extreme Query Server

The Extreme Query Server stores information about millions of call recordings for quick retrieval. The CIC 2015 R1 or later environment requires a fresh install of the Interaction Recorder Extreme Query Server.

For licensing, requirements, and installation and configuration instructions, see the <u>Interaction Recorder Extreme Query Installation</u> <u>and Configuration Guide</u> in the <u>PureConnect Documentation Library</u>.

# **Appendix C: Oracle Tablespaces**

For Oracle databases, CIC Database Migration Assistant uses the following tablespaces:

- ININ data/index tablespaces: The tablespaces where database objects for the ININ MIGRATION schema reside.
- Target data/index tablespaces: The tablespaces where CIC 4.0 data and database objects (tables, indexes, stored procedures) reside.

The data and index tablespaces lay out logical storage locations, which tie to physical storage locations by way of the Oracle tablespace configuration. Table data reside in the data tablespaces, and index data reside in the index tablespaces. The system uses CIC 2015 R1 or later data/index tablespaces for data that are specific to the 2015 R1 or later database that you are migrating into. The ININ data/index tablespaces contain information for all database migrations, not specific to any 2015 R1 or later schema. While the schema name (ININ\_MIGRATION) does logically separate the migration history data from other CIC 2015 R1 or later schemas, using separate ININ data and index tablespaces allows you to specify separate storage locations. The separate storage locations allow you to take one CIC 2015 R1 or later schema and its attendant tablespaces offline without disturbing the ININ\_MIGRATION historical migration.

The ININ data/index tablespaces can be the same as the CIC 2015 R1 or later data/index tablespaces, but Genesys recommends that they be different. The data stored in the ININ data/index tablespaces are migration progress log entries for the Interaction Recorder and Customer Satisfaction Survey migrations, and some table-specific migration history data.

The tables and indexes that the migration process creates reside in the ININ data/index tablespaces and contain data related only to migrating data into specific schemas that use those tablespaces.

Typically, Genesys recommends that any single CIC 2015 R1 or later schema have its own data and index tablespace so that disk space is managed independently for each 2015 R1 or later schema. Migrating CIC 3.0 data into a CIC 2015 R1 or later schema creates tables that do key mapping/translation between 3.0 primary/foreign keys and 4.0 primary/foreign keys. The key translation tables are in the same tablespace because they are related directly to the 2015 R1 or later data.

The following example illustrates why it is a good idea to separate the CIC 2015 R1 or later tablespaces from the ININ tablespaces. Let's say a single Oracle instance hosts 3 different CIC 4.0 schemas, one for a different CIC server. One schema is for production, another for special projects, and a third for testing out CIC 2015 R1 or later. Let's say also that each of those schemas has their own data and index tablespaces. At one point, you migrate some data from a CIC 3.0 database to the 2015 R1 or later test schema for evaluation purposes. Once you complete testing, the test schema and tablespaces are wiped clean or deleted. The production system goes live, and data migrates from a CIC 3.0 schema to the 2015 R1 or later production schema. In that scenario, if the ININ data/index tablespaces were the same ones as the 2015 R1 or later test schema's tablespaces, migration history and logging is lost. If the ININ data/index tablespaces were not any of the 2015 R1 or later tablespaces (test/evaluation, special projects, production), that history and log is not lost regardless of what happens to the other schemas and their tablespaces.

Losing the data in the ININ tablespaces does not prevent any future migrations from completing successfully. So, it is not required for the ININ tablespaces to be separate and protected.

# **Appendix D: Interaction Conference Migration**

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.

# Interaction Conference architecture

Interaction Conference is a premise-based audio conferencing application that allows your enterprise to host scheduled conference calls for internal and external use.

The Interaction Conference system components relevant to the CIC migration process are:

- **CIC Server**. The CIC server uses an Interaction Conference subsystem to host and manage the conference calls.
- Database Server. The repository for conference scheduling and historical data and also the CIC Report Database where all CIC Servers record call data.
- Client Workstations. Interaction Conference provides the following client workstation plug-ins:
  - (Required) MSOutlook\_IConferencePlugins.msi, a required client plug-in for Microsoft Outlook 2010 computers that allows users to schedule conferences from an Outlook Appointment Request. This plug-in installs in the CIC InteractionConferenceMSOutlookPlugin shared directory on the CIC server.
  - **(Optional)** ICServerManagerApps\_IConferencePlugins.msi, an optional client plug-in that users can run on workstations that have Interaction Administrator installed and where administrators configure Interaction Conference.

For more information about configuring Interaction Conference, see the <u>Interaction Conference Administrator's Guide</u> in <u>PureConnect Documentation Library</u>.

# Interaction Conference migration requirements

This section describes the minimum requirements for Interaction Conference 3.0 to Interaction Conference 2015 R1 or later migrations.

## Interaction Conference 3.0 server

- CIC 3.0 SU 14 or later
- Interaction Conference 3.0 SU 3

#### Interaction Conference 2015 R1 or later server

- CIC 2015 R1 or later or later
- Interaction Conference 2015 R1 or later

# **Migrate Interaction Conference**

Migrate Interaction Conference as part of your CIC migration.

#### Run Interaction Migrator to export Interaction Conference 3.0 configuration data

Interaction Migrator exports Interaction Conference 3.0 configuration data as part of the CIC 2.4/3.0 export process, described in Export CIC 2.4/3.0 Configuration Data.

Note: On the Data Component Selection page, ensure that Select All is selected (default) so that Interaction Migrator exports all Interaction Conference configuration data.

## Install Interaction Conference 2015 R1 or later

Install Interaction Conference 2015 R1 or later when you install the CIC 4.0 server. Setting up and installing the CIC 2015 R1 or later Server is described in <u>Prepare the CIC 2015 R1 or Later Server Environment</u>.

For more information about Interaction Conference 2015 R1 or later installation procedures, see "Installation Tasks" in the *Interaction Conference Administrator's Guide* in the *PureConnect Documentation Library*.

#### Run CIC Database Migration Assistant to migrate the Interaction Conference database

CIC Database Migration Assistant automatically migrates the Interaction Conference database as part of the CIC database migration, or as a standalone application. Depending on your company's requirements, you can migrate specific sections of the database and CIC over migrating as a whole.

CIC Database Migration Assistant migrates all Interaction Conference data—it does not filter data by parameters that you set on the **Date Range** page. For example, if an administrator migrates a database that includes call history and Interaction Conference, and then specifies a date range of one month, CIC Database Migration Assistant migrates one month of call history, but all Interaction Conference tables.

Before you run CIC Database Assistant, ensure that you complete all installation and configuration tasks for the Interaction Conference 4.0 server as described in the "Installation Tasks" section of the <u>Interaction Conference Administrator's Guide</u> in the <u>PureConnect Documentation Library</u>.

#### **Change the Interaction Conference site ID**

After you migrate the Interaction Conference 3.0 database, to ensure that the migration carries all historical Interaction Conference data to the new system, change the site ID in Interaction Conference 2015 R1 or later to match the site ID assigned in Interaction Conference 3.0.

#### To change the site ID for a SQL database:

Run the IConSiteID.SQL script on the Interaction Conference 2015 R1 or later database with the following syntax:

```
sqlcmd -S ServerName -d DBName -U UserName -P password -I "C:\Program Files
(x86)\Interactive Intelligence\CIC Database Migration
Assistant\Scripts\sqlserver\IConSiteId.sql" -v NewSiteId=<new site id value> OldSiteId=<old
site id value>
```

#### To change the site ID for an Oracle database:

Run the IConSiteID.SQL script on the Interaction Conference 2015 R1 or later database with the following syntax:

```
sqlplus [Owner]/[Password]@hostname:port/service @"C:\Program Files\Interactive
Intelligence\CIC Database Migration Assistant\Scripts\oracle\IConSiteId.sql" [Owner_Name]
[NewSiteID] [OldSiteID]
```

#### Run Interaction Migrator to import the Interaction Conference configuration data

Interaction Migrator imports Interaction Conference 3.0 configuration data as part of the CIC 2.4/3.0 export process, described in <u>Import CIC 2.4/3.0 Configuration Data</u>.

**Note:** After Interaction Migrator loads the Interaction Conference server 3.0 configuration data file and extracts the data, on the **Import Items** page, select all components to ensure that Interaction Migrator imports all Interaction Conference configuration data.

# **Appendix E: Interaction Director Migration**

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

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

## Interaction Director client/server architecture

Interaction Director uses client/server architecture, meaning that software deploys across servers that collectively comprise a system. Two types of servers comprise Interaction Director:

- **Director server**: A stand-alone computer on which Interaction Director server software runs. Migrate the Director server *after* you migrate all monitored servers.
- Monitored server: Two or more CIC servers that Director server manages and that you configured to know about. Each monitored server provides information to the Director Server that allows it to route calls most efficiently. Migrate all monitored servers before you migrate the Director server.

For more information about Interaction Director configuration, see the <u>Director Monitored Server Installation and Configuration</u> <u>Guide</u> and the <u>Interaction Director Installation and Configuration Guide</u>.

# Interaction Director migration

You must migrate all Interaction Director monitored servers before you migrate the Interaction Director server.

The current release of the CIC 2.4/3.0 to CIC 4.0 migration package supports only one-to-one Director-monitored server migrations. Multiple Director-monitored server environments must create a 4.0 Director-monitored server for each existing Director-monitored server and migrate the configuration data on a one-to-one basis.

#### Interaction Director migration requirements

This section describes the minimum requirements for Interaction Director 2.4 to 4.0 migrations.

#### Interaction Director 2.4 servers

- Interaction Director 2.4 SU 3 or later
- CIC 2.4 SU 35 or CIC 3.0 SU 13 or later
- SQL Client (Oracle or Microsoft), installed before Director Server

**Note:** Microsoft's SQL Client (osql.exe) installs with Microsoft SQL server. Oracle's script execution engine (sqlplus.exe) installs with the Oracle Client install. For version-specific details, see the Oracle server documentation.

#### **Interaction Director 4.0 servers**

- Interaction Director 4.0 GA or later
- CIC 4.0 SU 3 or later
- SQL Client (Oracle or Microsoft), installed before Director Server

**Note:** Microsoft's SQL Client (osql.exe) installs with Microsoft SQL server. Oracle's script execution engine (sqlplus.exe) installs with the Oracle Client install. For version-specific details, see the Oracle server documentation.

#### **Migrate Interaction Director monitored servers**

Interaction Migrator exports and imports Interaction Director Monitored server configuration data along with the CIC configuration.

Run Interaction Migrator to migrate the Interaction Director configuration on each monitored server in your implementation as part of the CIC 2.4/3.0 to CIC 4.0 migration process.

#### **Migrate the Director server**

You maintain the Director server configuration within Interaction Director-specific Interaction Administrator containers. The Director server also stores detailed interaction data within a database.

Migrate the Director server after you complete the CIC 2.4/3.0 to CIC 4.0 migration, which includes Interaction Director Monitored server migration.

Complete the steps in this section to migrate the Interaction Director server.

#### Install Interaction Migrator 4.0 on the Interaction Director 2.4 server

Install Interaction Migrator 4.0 on the Director 2.4 server as described in <u>Interaction Migrator Installation</u>. Ensure that you install the latest version of Interaction Migrator. For more information, see the PureConnect Customer Care site at <u>https://my.inin.com/support/products/ic40/Pages/Migrations.aspx</u>.

#### Install the 4.0 Interaction Director server

Install the Interaction Director 4.0 server as described in the <u>Interaction Director Installation and Configuration Guide</u> in the <u>PureConnect Documentation Library</u>.

#### Run Interaction Migrator to export Interaction Director 2.4 configuration data

Run Interaction Migrator on the Director 2.4 server to export the Interaction Director configuration data using the same process described in Export CIC 2.4/3.0 Configuration Data.

Note: On the Data Component Selection page, ensure that Select All is selected (default) so that Interaction Migrator exports all Director configuration data.

#### Run CIC Database Migration Assistant to migrate the Interaction Director database

From the CIC Database client computer, run CIC Database Migration Assistant to migrate the Interaction Director database.

Note: To ensure that the migration carries all historical Director data to the new system:

- On the Database Server Credentials page, select the Director Server 2.4 and Director Server 4.0 databases.
- On the Select Table Groups to Migrate page, select the Director table group.

#### Run Interaction Migrator to import the Interaction Director configuration data

Run Interaction Migrator on the Director 4.0 server to export the Interaction Director configuration data using the same process described in <u>Import CIC 2.4/3.0 Configuration Data</u>.

**Note:** After Interaction Migrator loads the Director Server 2.4 configuration data file and extracts the data, on the **Import Items** page, select all components to ensure that Interaction Migrator imports all Director configuration data.

# **Change Log**

The following changes have been made to this document since it was first distributed.

Date	Change
12-December-2012	In Appendix A: "Guidelines for Creating Your Migration Environment," updated the first bullet point in section "Migrating to the production environment" to clarify that you should create a new CIC 4.0 database for production and perform the database migration from the source (not the development) database.
13-March-2013	<ul> <li>In "Prepare the CIC 4.0 Server Environment," added a subsection to "Database server requirements" that addresses SQL Server 2000 to SQL Server 2012 upgrades.</li> <li>In "Migration Planning," in "CIC database migration scenarios," updated the "Many-to-one migration" description to include migrating multiple databases that contain data with identical site IDs.</li> <li>In "Introduction," updated the Interactive Update versions in "Minimum requirements for migrations" to Interactive Update 1.0 SU 11 and Interactive Update 2.0 SU 3.</li> <li>In "Migrate CIC 3.0 Workstations Using Interactive Update" updated the Interactive Update versions in "Required CIC and Interactive Update 2.0 SU 3 and updated the screen shots in the upgrade procedures for these versions.</li> <li>In "Migrate CIC 3.0 Workstations Using Setup.exe," reversed the "Upgrade Interactive Update" and "Upgrade IC User Applications" procedures and updated the "Upgrade Interactive Update" and "Upgrade Interactive Update" update 2.0 SU 3.</li> </ul>
10-May-2013	<ul> <li>In "Prepare for CIC Database Migration", updated the procedures in "Upgrade the CIC 2.4/3.0 and CIC 4.0 database schema" for the changes made to CIC Database Migration tools and scripts to ensure a successful migration to the database schema in CIC 4.0 SU 3 and later.</li> <li>"Prepare for CIC Database Migration", in "Prepare the CIC 3.0 and CIC 4.0 databases," added new procedure "Change the remote query timeout" to "SQL Server pre-migration procedures."</li> </ul>
18-June-2013	<ul> <li>In "Migrate the CIC 3.0 Database", in the "Migrate the 3.0 Database" procedure, updated step 12 with instructions for selecting a time zone to process UTC fields that appear in some 4.0 table groups, added a Windows support site link for users in specific time zones, added default Start Date and End Date, and noted that if the Site ID field is blank, the system migrates all records.</li> <li>In "Prepare for CIC Database Migration, "Manually run the individual database schema upgrade scripts", in clarified that in the Oracle syntax to run from the command line, <dba user=""> is the owner of the database and is CIC_ADMIN by default.</dba></li> <li>In "Prepare for CIC Database Migration, "Manually run the individual database schema upgrade scripts", updated the order of the manual script execution in the following sections:</li> <li>Upgrade the CIC 2.4/3.0 database schema to the most recent CIC 3.0 database schema (Oracle)</li> <li>Upgrade the CIC 4.0 database schema to the most recent CIC 4.0 database schema (SQL Server)</li> <li>Upgrade the CIC 4.0 database schema to the most recent CIC 4.0 database schema (Oracle)</li> <li>In "Prepare for CIC Database Migration, "Manually run the</li> </ul>

	<ul> <li>individual database schema to the most recent CIC 4.0 database schema (Oracle)" section, updated notes for the SetUpMigratorUser.sql script that the user should ensure the <dba_user> is in the "sysdba" role, required to properly run the SetUpMigratorUser.sql script.</dba_user></li> <li>In "Prepare for CIC Database Migration, "Prepare the CIC 3.0 and CIC 4.0 databases", combined content from the "Change restart table values" section. Resetting the value "and "Change restart table values" section. Resetting the value "and "Change restart table values" section. Resetting the value "and "Change restart table values" section. Resetting the value and "Change restart table values" section. Resetting the value and "Change restart table values" section. Resetting the value and "Change restart table values" section. Resetting the value and "Change restart table values" section. Resetting the value and "Change restart table values" section. Resetting the value and "Change restart table values" section. Resetting the value to avoid numerous entries in error tables due to duplicates is no longer necessary.</li> <li>In "Prepare for CIC Database Migration, "Upgrade the CIC 2.4/3.0 and CIC 4.0 database schema", in the "User CIC Database Script Execution Tool to run the database schema upgrade scripts (SQL Server only)" section, updated step 7 to describe behavior when the CIC 3.0 database is SQL 2000 Server 32-bit and is accessed with SQL Server Authentication credentials lacking rights to create a stored procedure on the master database.</li> <li>In "Migrate the CIC 3.0 Database, in the "Ingrate the CIC 3.0 Database in the "Ingrate the CIC 3.0 Database in the "Incremental Migrations" section, deleted the second bullet point under Notes. All tables have unique indexes; the system excludes previously migrated data without causing error. The bullet point cautioning the user anot to overlap date ranges to avoid duplicate data is no longer applicable.</li> <li>In Migrate the CIC 3.0 Database, "Migrate the CIC 3.0 Database section",</li></ul>
02-July-2013	Updated supported Oracle versions and caveat about Oracle 11.2.0.3 client in "Prepare the CIC 4.0 Server Environment" in the "Database server requirements" section.

20-September-2013	<ul> <li>Made major organizational changes to this document to incorporate Interaction Dialer 2.4/3.0 to 4.0 migration information and procedures. Added three new chapters, which changed the chapter numbering: "Prepare the Interaction Dialer 4.0 Server Environment," "Prepare for Interaction Dialer Database Migration," and "Migrate the Interaction Dialer 2.4/3.0 Database."</li> <li>Made updates throughout this document to reflect: <ul> <li>The current migration package tools require CIC 4.0 SU 3 and later.</li> <li>The current migration package contains Oracle support for Interaction Database Migration Assistant for CIC 4.0 SU 3.</li> </ul> </li> <li>Added Appendix D: Interaction Director Migration</li> <li>Added Appendix E: Interaction Director Migration</li> <li>In "Workstation Migration Planning", updated "CIC 4.0 client workstation software requirements" to include Windows 8 support, available in CIC 4.0 SU 3 and later.</li> <li>Updated "Interaction Optimizer Considerations" sections in this document to reflect new behavior in CIC Database Migration Assistant for Interaction Optimizer data.</li> </ul>
19-December-2013	<ul> <li>In "Prepare the CIC 4.0 Server Environment", updated "Database server requirements" for Microsoft SQL Server version.</li> <li>In "Migrate CIC 3.0 Workstations Using Interactive Update", in "Create a 'migration' machine group", added note about Modify Group Members option in Interactive Update 1.0 SU 12 and later.</li> </ul>
03-February-2014	<ul> <li>In "Prepare for CIC Database Migration":</li> <li>Updated "Upgrade the CIC 4.0 database schema to the most recent CIC 4.0 database schema (Oracle) to add Create_User_Role.sql."</li> <li>"Updated all sections that describe running scripts manually that the scripts be run consecutively, not concurrently."</li> </ul>
10-April-2014	<ul> <li>In "Prepare the CIC 4.0 Server Environment," in "Database server requirements," added note and KB article reference about known issues with Oracle client 11.2.0.1.0.</li> <li>In "Import CIC 2.4/3.0 Configuration Data," in "Run Interaction Migrator to import CIC 2.4/3.0 configuration data," added note about stopping CIC Service if running a Switchover pair.</li> </ul>
28-April-2014	<ul> <li>Removed Migration Checklists from beginning of this document. A more comprehensive, separate Migration Checklists document is available in the Migration package on the Product Information site. Updated screenshot of Migration package in "Introduction."</li> <li>Made additional minor edits.</li> </ul>
06-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 Interactive Intelligence Product Information site URLs, and copyright and trademark information.
15-January-2015	<ul> <li>In "Migrate CIC 3.0 Managed IP Phones", added section "Identify Imported Managed IP Phones".</li> <li>In "Install CIC Database Migration Assistant", added section for "Oracle Client requirements".</li> <li>In "Migrate the CIC 3.0 Database", added 4th bullet to "Additional notes" section in step 12 of "Migrate the CIC 3.0 database" procedure to run ICUserID Dedup script.</li> <li>In "Prepare for CIC Database Migration", in the "Upgrade the CIC 4.0 database schema" section, corrected name of TrackerBuild.sql in list of scripts.</li> </ul>

27-January-2015	<ul> <li>"Install CIC Database Migration Assistant", in the "Tracing" section, added note about drive space.</li> <li>"Export CIC 2.4/3.0 Configuration Data", in the "To export CIC 2.4/3.0 configuration data" section, added bullet about IPA node is not checked by default.</li> <li>"Import CIC 2.4/3.0 Configuration Data", in the "Before you run Interaction Migrator to import CIC 2.4/3.0 configuration data" section, added bullet about verifying the NIC.</li> <li>"Prepare for CIC Database Migration" removed Delete_Dups_IVRInterval.sql, Delete_Nulls_UserObjectSecurity.sql, and Delete-Dups_UserObjectSecurity.sql scripts from list for SQL Server and Oracle.</li> <li>"Migrate the CIC 3.0 Database", in the "Optimizer table group considerations" section, added 3rd bullet to indicate that data from CIC 3.0 cannot be merged into existing data.</li> <li>"Workstation Migration Planning", in the "Custom client settings stored on the CIC server" section, updated the location of where the custom client settings are stored.</li> <li>"Migrate the Interaction Dialer 2.4/3.0 Database", in the "Dialer database migration considerations" section, added bullet about deleting workflows that do not contain historical workflow tables to avoid an error.</li> <li>"Migrate the CIC 3.0 Database", in the "To migrate the CIC 3.0 database" section, added note to indicate that files are zipped and encrypted after a user clicks finish.</li> </ul>
28-January-2015	"Prepare for CIC Database migration", changed path names that included \ic30 to \source and \ic40 to \target.
29-January-2015	<ul> <li>"Introduction", in the "Migration package contents" section, updated to indicate new downloads page and use of Migration .iso.</li> <li>"Install Interaction Migrator", in the "Interaction Migrator version information" section and the "Install Interaction Migrator" section, updated to indicate new downloads page and use of Migration .iso.</li> <li>"Export CIC 2.4/3.0 Configuration Data", in the "If applicable, run the Interaction Recorder Migration Prep Utility" section, removed reference to CIC 2.4 and updated to indicate new downloads page and use of Migration .iso.</li> <li>"Introduction", in the "CIC Database Migration Assistant Version information" section, updated to indicate new downloads page and use of Migration .iso.</li> </ul>
03-June-2015	<ul> <li>In "Install CIC Database Migration Assistant", in the "About the CIC Database Migration Assistant package" section, removed bullet about CIC Database Script Execution Tool.</li> <li>In "Install CIC Database Migration Assistant", in the "Install CIC Database Migration Assistant" section, in step 8 removed two icons for script shortcuts for CIC Database Script Execution Tool for 3.0 and 4.0 SQL Scripts.</li> <li>In "Prepare for CIC Database Migration", in the "Upgrade the CIC 2.4/3.0 and CIC 2015 R1 or later database schema" section, updated the two options for running the database schema upgrade scripts.</li> <li>In "Prepare for CIC Database Migration", removed "Use CIC Database Script Execution Tool to run the database schema upgrade scripts (SQL Server only)" section.</li> <li>In "Migrate the CIC 3.0 Database", in the "To migrate the CIC 3.0 database" section, added information about checking for compatibility of source and target database.</li> </ul>

15-July-2015	<ul> <li>Replaced Interaction Client .NET Edition with Interaction Desktop.</li> <li>In Appendix B: Interaction Recorder Migration, "Licensing" section, updated name of TR to Interaction Recorder and Interaction Quality Manager Technical Reference.</li> <li>In Workstation Migration Planning in the "Windows OS requirements" section, updated requirements for Windows 8 and 8.1 to include 32-bit.</li> <li>Updated cover page and copyright page.</li> </ul>
31-August-2015	<ul> <li>Migration Planning, in the "Interaction Dialer configuration and database migration summary" section, added information about server parameter and event log entry.</li> <li>Migrate CIC 3.0 Managed IP Phones, in the "Create a DHCP custom option (recommended)" section, updated parameters in 2b.</li> </ul>
01-September-2015	<ul> <li>Import CIC 2.4/3.0 Configuration Data, in the "Run Interaction Migrator to import CIC 2.4/3.0 configuration data" section, added note about conversion of client settings.</li> <li>Workstation Migration Planning, in the "Custom client settings" section, updated note to refer to the Transition to Interaction Desktop Administrator's Guide.</li> </ul>
11-September-2015	Prepare for CIC Database Migration, reorganized to create sections for Oracle and SQL Server.
16-October-2015	Updated requirements to indicate .NET Framework 4.5.2.
20-October-2015	Chapter 17: Migrate CIC 3.0 Workstations Using Interactive Update, updated for 2015 R1 or later.
11-January-2016	Migration Planning and Chapter, Prepare for CIC Database Migration, and Migrate the CIC 2.0 Database, updated to clarify Optimizer consideration. Updated copyright and trademark information.
15-February-2016	Migrate the CIC 3.0 Database, removed sentences suggesting that you run CIC database Migration Assistant before importing CIC configuration data.
10-March-2016	Updated requirements to include Windows 10 version 1511.
04-October-2016	Updated Install Interaction Migrator, Prepare the CIC 2016 R1 or later Server Environment, and Migrate Intea4rction Media Server 3.0 to explain the appropriate version of Interaction Migrator to download and install instead of always installing the "latest" version.
07-December-2016	Updated Prepare the CIC 2015 R1 or Later Server Environment, Database server requirements to include Microsoft SQL Server 2016.
11-July-2017	Updated Microsoft .NET Framework 4.5.2 requirement to Microsoft .NET Framework 4.5.2 or later.
18-October-2017	Rebranded to Genesys.
10-January-2018	Added "IP table names" section in chapter 12 to indicate that the Interaction Migrator import appends "_migrated" to the IP table names.
15-March-2018	Added link to "CIC 4.0 License Upgrade Guide" to the "Review the CIC 4.0 License Upgrade Guide" section
28-March-2018	Updated document format.
14-June-2018	Added Microsoft .NET Framework 4.7 requirement for PureConnect 2018 R4 or later.

1-February-2019	Updated "Create a UDL file for the new 2015 R1 or later database" to indicate that the UDL file resides on the CCS server, not the CIC server.
-----------------	--