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GENESYS™

Transition to Interaction Desktop

Administrator's Guide

Abstract

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

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

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Introduction

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

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

More information

For more information about using Interaction Desktop, see these quick reference materials: http://help.genesys.com/cic/mergedProjects/wh_qr/desktop/Quick_Reference_Materials.htm.

- *Interaction Desktop Quick Start Guide*
- *Interaction Desktop Quick Reference Card*
- *Interaction Desktop Operator Console Quick Reference Card*

Interaction Desktop also has a complete help system that is available on the Interaction Desktop **Help** menu and also in PDF and DOC format at: http://help.inin.com/cic/desktop/Printable_Documentation.htm.

- Interaction Desktop client Help

Audience

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

3.0 vs. 4.0 migration

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

See the appropriate section in this document:

- *Interaction Client .NET Edition 3.0 migration*
- *Interaction Client .NET Edition 4.0 migration*

Interaction Client .NET Edition 3.0 migration

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

What the 3.0 migration utility does

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

3.0 Migration process

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

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

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

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

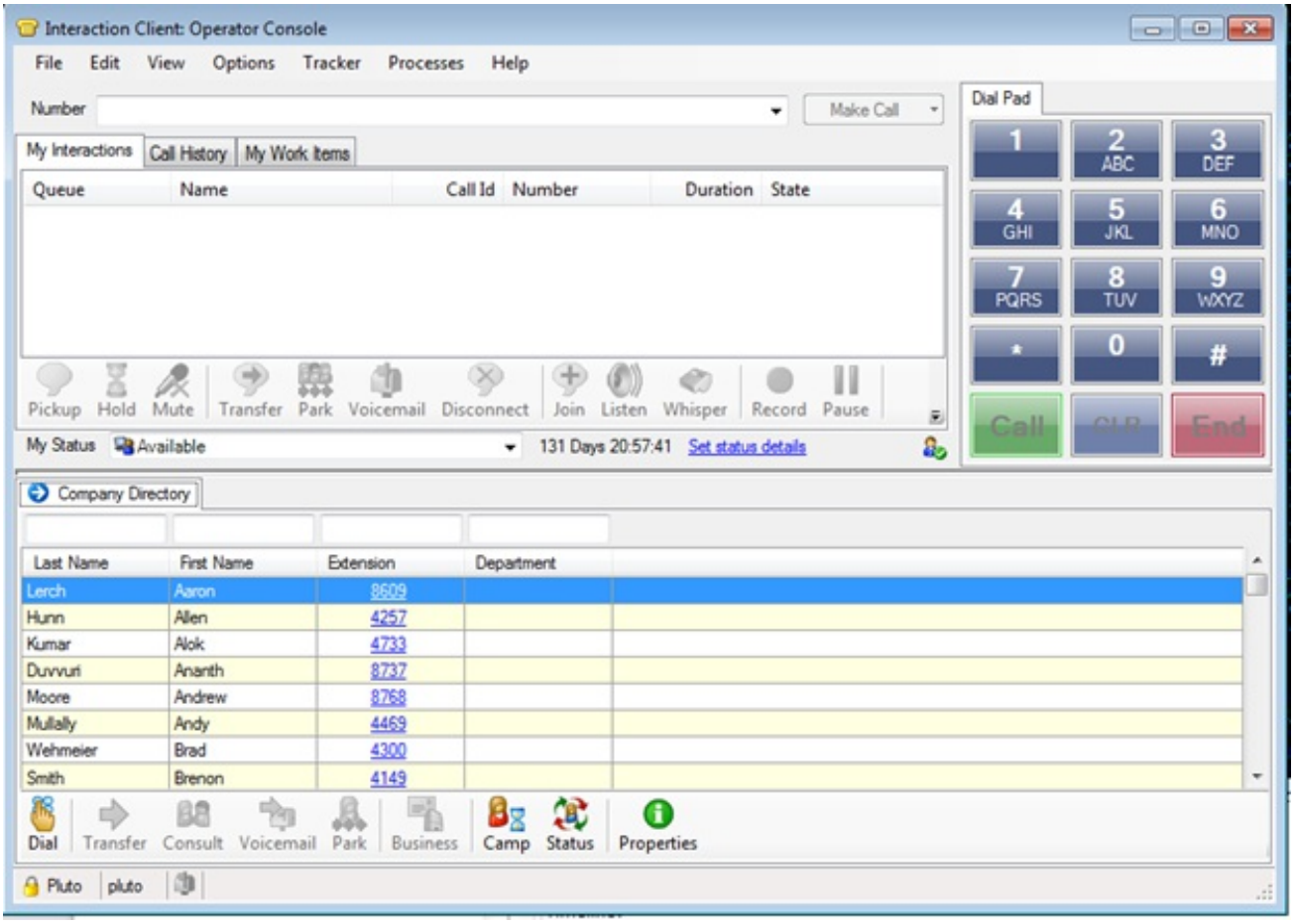
Using the legacy migration parameter to migrate from 3.0

Using the legacy migration utility to migrate from 3.0

Using the legacy migration parameter to migrate from 3.0

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

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

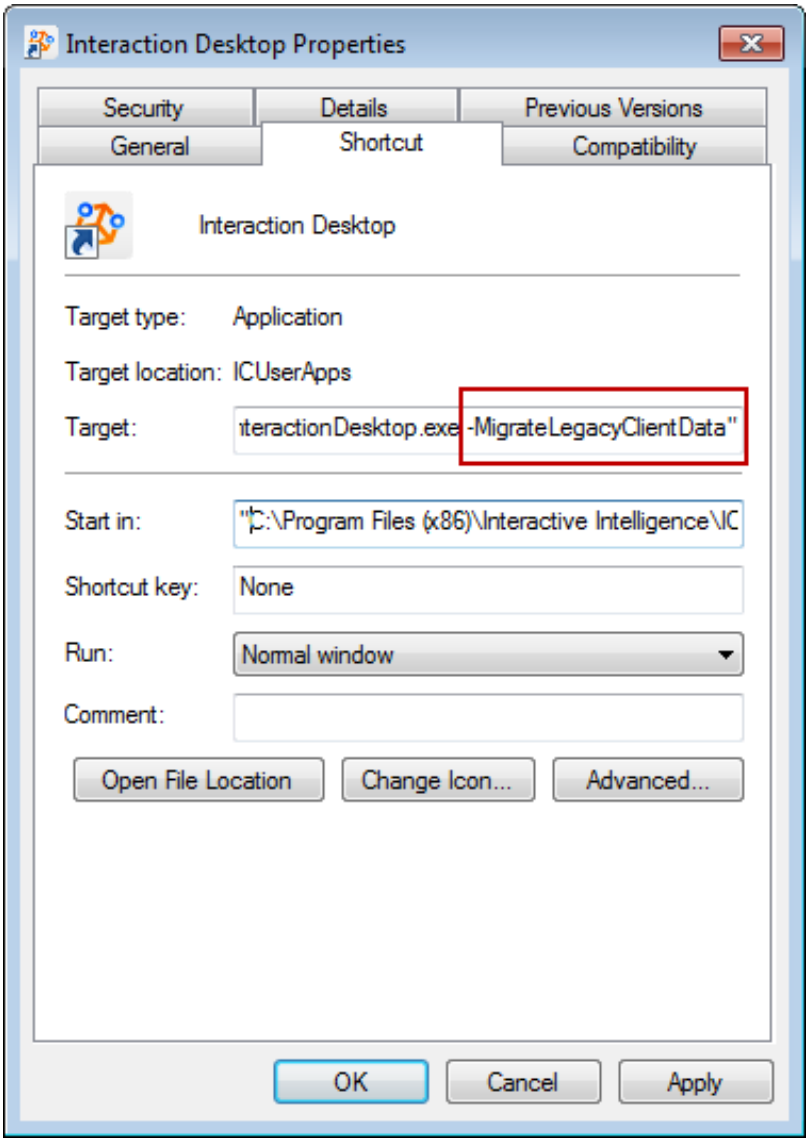


2. This CIC client user has the *same user name* in both the 3.0 and 2016 CIC systems. The 2016 IC server has the *same server name* as the 3.0 IC server.

   Important! If these names do not match, the CIC user cannot use the MigrateLegacyClientData parameter to migrate client settings. See "Using the legacy migration utility to migrate from 3.0".

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

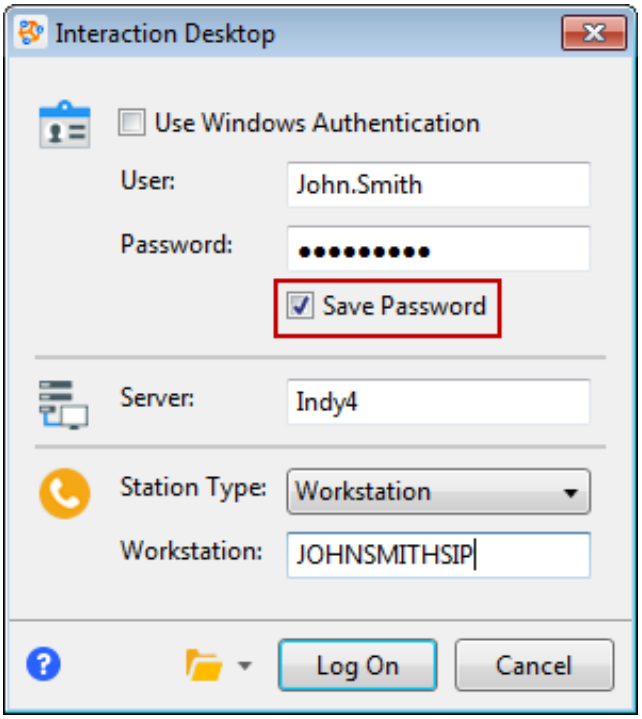
   The IC administrator can create an Interaction Desktop shortcut with this parameter and use Windows Group Policy or some other method to distribute it to all client users. Or the CIC client users could modify the Interaction Desktop shortcut themselves.



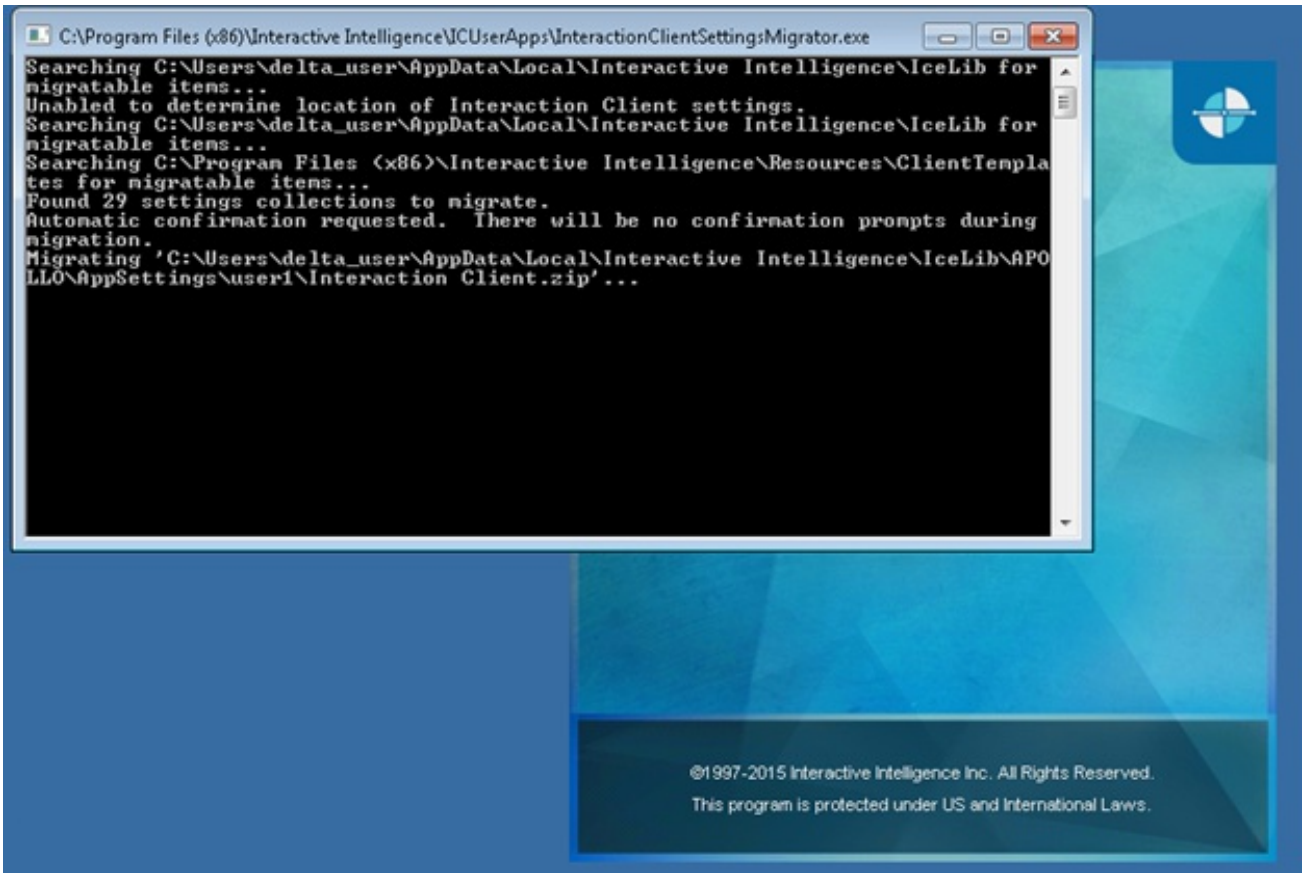
CIC client users could also use the parameter to start Interaction Desktop from a command prompt in the `C:\Program Files (x86)\Interactive Intelligence\ICUserApps\` directory.

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

> **Important!** If the CIC user does not select this check box, the migration process does not start.

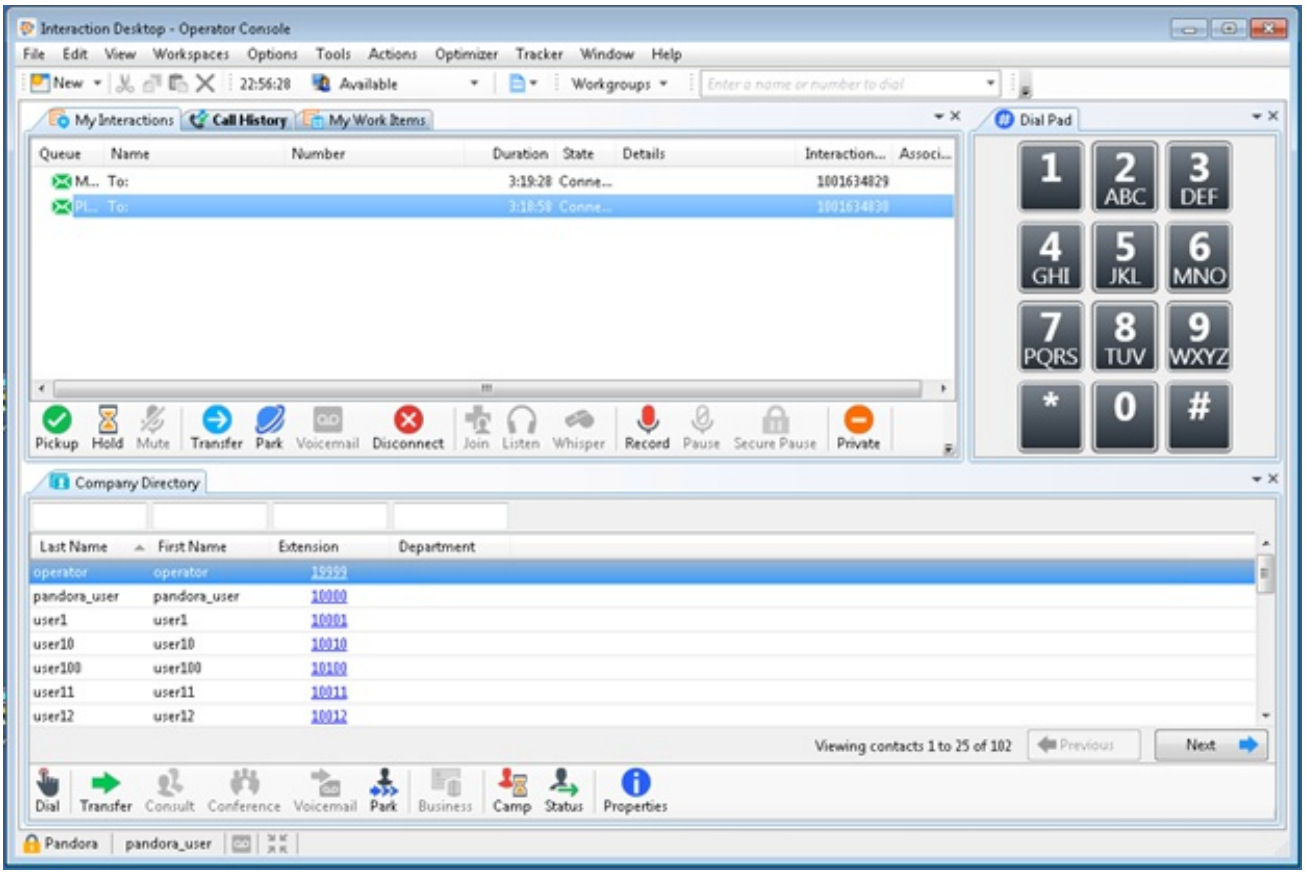


5. The migration process starts and reports on its progress.



6. Interaction Desktop starts and displays the same arrangement of selected views as appeared in Interaction Client .NET Edition. These views appear in the Interaction Desktop default workspace.

> **Note:** There is a slight delay before Interaction Desktop appears for the first time after the migration.



7. If CIC users employ the Interaction Desktop shortcut to migrate, after the migration process completes, they should edit the shortcut and remove the `MigrateLegacyClientData` parameter.

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

Using the legacy migration utility to migrate from 3.0

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

1. A CIC client user has configured Interaction Client .NET Edition 3.0 to display a preferred arrangement of selected client views.
2. The CIC user starts the legacy migration utility, using any necessary parameters:
   `C:\Program Files(x86)\Interactive Intelligence\ICUserApps\`**`LegacyInteractionClientMigrator`**

User, Password, and Host parameters

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

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

Oldhost parameter

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

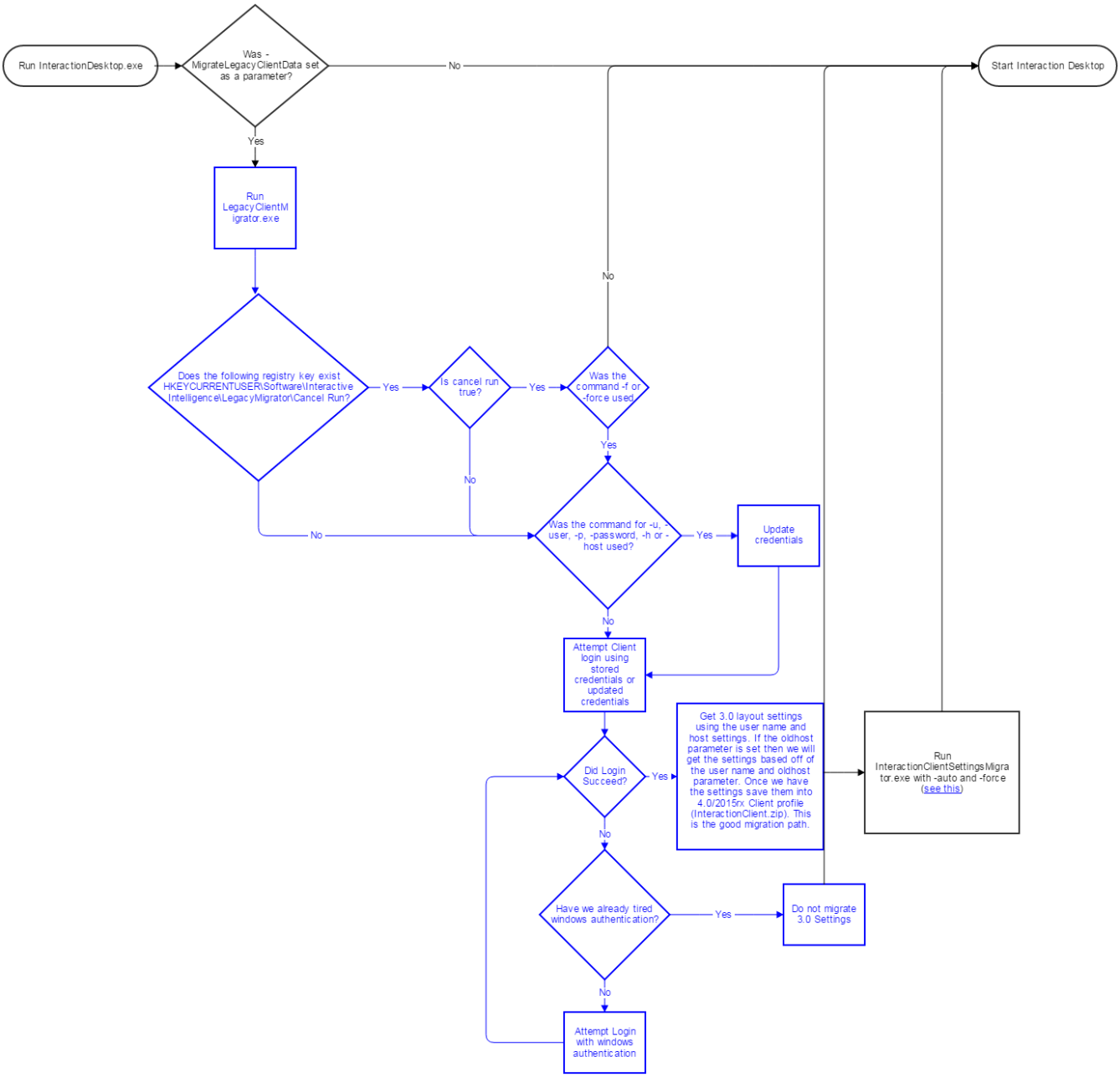
Example:

```
LegacyInteractionClientMigrator.exe u John.Smith p 1234 h CICServerB oldhost CICServerA
```

`-u` `-user`	CIC client user name
`-p` `-password`	CIC client user password
`-h` `-host`	IC server name
`-oldhost`	IC 3.0 server name if different from IC 2016rX server name.
`-force`	CIC users can employ the force parameter to run the migration utility again, if they ran it previously.

3. The legacy migration utility converts and saves CIC client settings in 4.0/2015 format.
4. Next, either the CIC administrator or the CIC client user must run the 4.0 Migration utility, `InteractionClientSettingsMigrator`, in both **auto** and **force** mode. For details, see How to run the 4.0 Interaction Client Settings Migrator utility.
5. After the 4.0 Migration Utility finishes, the CIC user should log on to Interaction Desktop and confirm that selected views now appear in the Interactions Desktop default workspace.

3.0 Migration process flowchart


Run InteractionDesktop.exe
Was -MigrateLegacyClientData set as a parameter?
No
Start Interaction Desktop
Yes
Run LegacyClientMigrator.exe
Does the following registry key exist HKEYCURRENTUSER\Software\Interactive Intelligence\LegacyMigrator\Cancel Run?
Yes
Is cancel run true?
Yes
Was the command -f or -force used
No
Yes
No
No
Was the command for -u, -user, -p, -password, -h or -host used?
Yes
Update credentials
No
Attempt Client login using stored credentials or updated credentials
Did Login Succeed?
Yes
Get 3.0 layout settings using the user name and host settings. If the oldhost parameter is set then we will get the settings based off of the user name and oldhost parameter. Once we have the settings save them into 4.0/2015r Client profile (InteractionClient.zip). This is the good migration path.
Run InteractionClientSettingsMigrator.exe with -auto and -force (see this)
No
Have we already tired windows authentication?
Yes
Do not migrate 3.0 Settings
No
Attempt Login with windows authentication

Interaction Client .NET Edition 4.0 migration

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

What the 4.0 migration utility does

4.0 Migration process

What the 4.0 migration utility does

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

Client templates

User settings

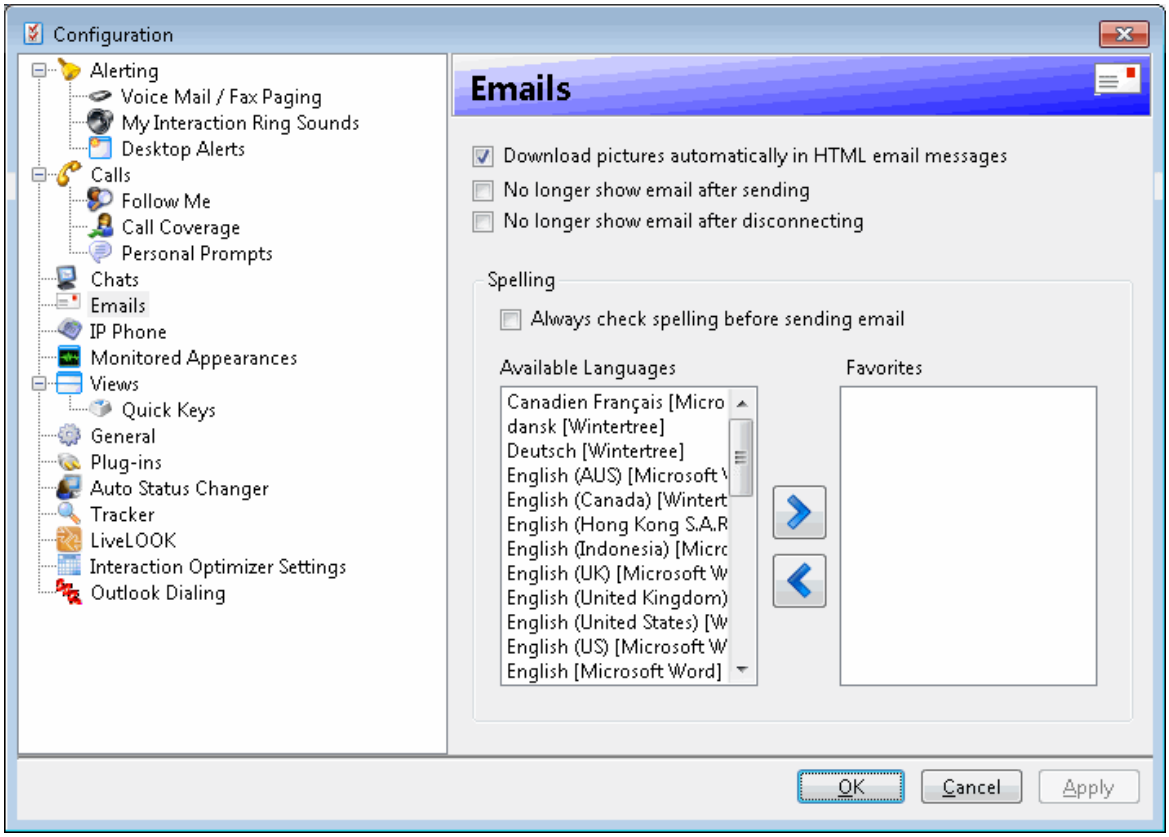
Client templates

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

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

- Can supply a standard set of user configuration settings.

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



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

In addition, Interaction Desktop client templates can supply:

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

Client template files

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

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

User settings

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

User settings files

CIC stores Interaction Client .NET Edition user settings in individual **Interaction Client.zip** files on the IC server in application settings directories: I3\IC\ClientSettings*username*\PersonalStorage\ApplicationSettings.

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

4.0 Migration process

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

Switchover pair

If your configuration includes a CIC server switchover pair, the Interaction Client .NET Edition 4.0 migration process has to occur only on the primary server.

Types of migration

How to run the 4.0 Interaction Client Settings Migrator utility

4.0 Migration process flowchart

Types of migration

The Interaction Client .NET Edition 4.0 migration utility can run in three different modes.

Automatic vs. Default migration

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

Forced migration vs. Normal migration

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

Scenario	Forced migration	Normal migration
Agent has used only Interaction Client .NET Edition.	Migrates Interaction Client .NET Edition client settings to Interaction Desktop client settings.	Migrates Interaction Client .NET Edition client settings to Interaction Desktop client settings.
Agent modified the Interaction Desktop layout or configuration.	Migrates Interaction Client .NET Edition client settings to Interaction Desktop client settings and overwrites the existing Interaction Desktop layout and settings.	Does not migrate Interaction Client .NET Edition client settings to Interaction Desktop client settings. The Agent keeps the existing Interaction Desktop layout and settings.
Agent modified the Interaction Desktop layout or configuration and then went back and modified the Interaction Client .NET Edition layout or configuration settings.		

Migration Process

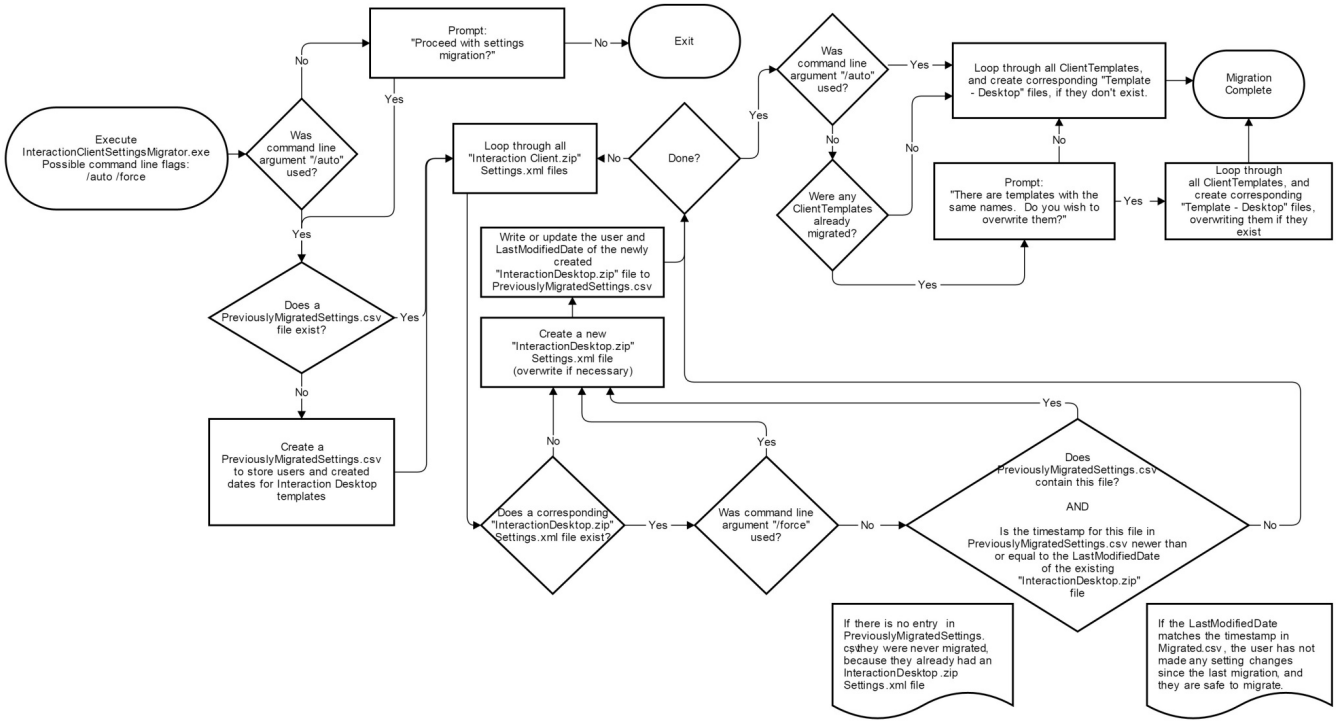
Mode	Description
Automatic	In automatic mode, the migration tool converts user settings only for users who have not yet modified the default layout or configuration settings for Interaction Desktop. Automatic mode preserves user settings for agents who have already used Interaction Desktop and possibly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

How to run the 4.0 Interaction Client .NET Edition Settings Migrator utility

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

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

Interaction Client .NET Edition 4.0 Migration process flowchart



Change log

Date	Changes
08-June-2015	• Corrected the name of the utility in the *How to run the Interaction Client Settings Migrator manually* section. Changed it from "InteractionSettingMigrator" to "InteractionClientSettingsMigrator". • Made rebranding changes to cover.
29-July-2015	IC-131357 Rewrote the "Migration process" section to make the operation of the three available modes clearer. Also checked for rebranding changes.
31-August-2015	IC-131786 Added new sections: • 3.0 vs. 4.0 migration • What the 3.0 migration utility does • 3.0 Migration process
14-December-2015	In the "More Information" section, updated the URLs for Quick Reference Materials and Client Comparison Matrix in the new Documentation Library.
02-May-2016	• IC-136928: Add old host parameter to the LegacyInteractionClientMigrator • Title page: Changed revision to CIC 2016 R4. • Copyright and Trademark page: Updated to 1/12/16 version. • More Information: Added link to printable documentation. • In the "Using the legacy migration parameter to migrate from 3.0" section, step 2, added: Important: If these names do not match, the CIC user cannot use the MigrateLegacyClientData parameter to migrate client settings. See Using the legacy migration utility to migrate from 3.0 on page 9. • In the "Using the legacy migration utility to migrate from 3.0" section, rewrote step 2 to incorporate Oldhost parameter information. • In the "3.0 Migration process flowchart" section, updated screen capture.
18-August-2017	• Rebranded using Genesys terminology. • Updated title page and Copyright and Trademarks page.
19-January-2018	Converted to HTML format.
26-April-2019	Reorganized the content only, which included combining some topics and deleting others. For more information, see CICDOC-176.