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Genesys Administrator Extension Migration Guide

Migration Procedures

Migration Procedures

After you have performed all necessary upgrades to your operating system, Management Framework, and web browser, use the following procedures as appropriate to migrate to the latest version of Genesys Administrator Extension.

Important

GAX 8.5.x uses an embedded instance of Jetty for web-server functions, whereas previous releases have used Tomcat. The following upgrade procedures explain how to upgrade GAX to use Jetty. To continue using Tomcat, you must remove the old **<Tomcat Home>/webapps/gax** folder and copy the new **gax.war** file from the GAX installation folder to the **<Tomcat Home>/webapps** folder.

Upgrading from Management Framework 8.1.1 or higher

1. Ensure that Management Framework, Configuration Server, and Genesys Administrator are all upgraded to versions that are compatible with the latest version of GAX before proceeding. Refer to the Genesys Administrator Extension Deployment Guide for more information.
2. Stop the instance of GAX that you want to upgrade.
3. If your GAX Application object type is Genesys Administrator Server and you do not intend to use the Pulse 8.5 plug-in, go to [step 6](#).
4. If your GAX Application object is of type Genesys Generic Server and you do not intend to use Pulse 8.5, use Genesys Administrator to create and configure the configuration objects that are required for the latest version of GAX, as follows:
 - a. Open your existing GAX Application object of type Genesys Generic Server in edit mode.
 - b. Click the **Options** tab.
 - c. Click **Export** to save your configured GAX options to a configuration file on your local file system. The file will have an extension of type **.conf** (on UNIX) or **.cfg** (on Windows).
 - d. Create and configure a new Application object for GAX of type Genesys Administrator Server, as follows. Refer to the [Genesys Administrator Extension Deployment Guide](#) for more information.
 - i. Ensure that you follow the steps that pertain to the use of Management Framework Configuration Server 8.1.1 or higher.
 - ii. Replicate any configuration that you want to add to your newly created Application object by referring to the GAX Application object in your previous version.
 - iii. Click the **Options** tab.
 - iv. Click **Import** and specify the configuration file that you created in [step c](#). Click **No** to avoid overwriting any existing options.
 - v. (Optional) Create a Database Access Point (DAP) that points to the Log Database (refer to the

[Genesys Administrator Extension Deployment Guide](#) for more information). Set the role of the DAP to auditing. Enable auditing by setting the value of the **[general].auditing** option to true. Add the DAP to your GAX connections. In the **Options** tab of the DAP, set the **[gax].role** option to auditing.

5. If your GAX Application object is of type Genesys Generic Server and you intend to use Pulse 8.5, you must reuse the existing GAX Application object to migrate to Pulse 8.5. Using Genesys Administrator, do the following:
 - a. Upload the GAX 8.5 Application Template. Refer to Genesys Administrator Help for instructions about uploading Application Templates.
 - b. Open the GAX 8.5 Application Template object.
 - c. Open the **Options** tab.
 - d. Click **Export** to save your configured GAX options to a configuration file on your local file system. The file will have an extension of type **.conf** (on UNIX) or **.cfg** (on Windows).
 - e. Close the GAX 8.5 Application Template.
 - f. Open your existing GAX Application object.
 - g. Open the **Options** tab.
 - h. Click **Import** and specify the configuration file that you created in [step d](#). Click **No** to avoid overwriting any existing options.
 - i. Click Save & Close.
6. Go to the GAX folder and back up the **webapp** folder by renaming it **webapp_backup**.
7. On the target machine, run the GAX installer for the release to which you want to upgrade. The installer copies the binary file and copies all of the required files to the target directory. For more details, refer to the procedure [Installing Genesys Administrator Extension Server](#).
8. If you are migrating from GAX 8.1.x, execute all applicable database upgrade scripts, if necessary. To determine if you have to apply any database scripts:
 - a. Execute the following SQL statement in your existing GAX database: `select * from db_schema_version.`
 - b. Compare the result with the update scripts in the **resources/sql_scripts** folder in the target directory of the installation.

Tip

The latest database schema versions are:

- asd—8.5.000.01
- opm-arm—8.1.301.01
- Core-8.5.260.11

For example, to upgrade from database schema version 8.1.301.01 to 8.5.260.11, run the following script:

- Oracle: `gax_core_upgrade_db_8.1.301.01_to_8.5.260.11_ora.sql`
- MS SQL: `gax_core_upgrade_db_8.1.301.01_to_8.5.260.11_mssql.sql`

- PostgreSQL: `gax_core_upgrade_db_8.1.301.01_to_8.5.260.11_postgres.sql`

9. As a local user on the host machine, whether in person or via a remote desktop connection, launch GAX and run Setup Mode. Follow the instructions in [Deploying Genesys Administrator Extension](#).
10. (Optional) You can delete the previous GAX Application object after you have verified that the new release is working correctly.
11. To use the System Dashboard feature, you must set up a connection to Solution Control Server (SCS). Refer to the procedure: [Set up a connection to Solution Control Server](#).
12. If you want to view log records in the Centralized Log Database, you must set up a connection to the Log Database through Message Server.
13. If you backed up the **webapp** folder to **webapp_backup**, do the following:
 - a. Stop GAX.
 - b. Copy the plug-in **.jar** files from **webapp_backup** to the new **webapp** folder in the GAX 8.5.x installation folder.
 - c. Delete the **webapp_backup** folder.
 - d. Start GAX.

Upgrading from Management Framework 8.1.0 or lower

1. Stop the instance of GAX that you intend to upgrade.
2. If you are migrating from an earlier version of Pulse to Pulse 8.5, reuse the existing GAX Application object and use Genesys Administrator to do the following:
 - a. Upload the GAX 8.5 Application Template. Refer to Genesys Administrator Help for information about uploading Application Templates.
 - b. Open the GAX 8.5 Application Template object.
 - c. Click the **Options** tab.
 - d. Click **Export** to save your configured GAX options to a configuration file on your local file system. The file will have an extension of type **.conf** (on UNIX) or **.cfg** (on Windows).
 - e. Close the GAX 8.5 Application Template.
 - f. Open your existing GAX Application object.
 - g. Click the **Options** tab.
 - h. Click **Import** and specify the configuration file that you created in [step d](#) from the GAX 8.5 Application Template. Click **No** to avoid overwriting any existing options.
 - i. Click **Save & Close**.
3. If you want to retain the installed plug-ins that you used with GAX 8.1.x, go to the GAX folder and back up the **webapp** folder by renaming it **webapp_backup**.

4. On the target machine, run the GAX installer for the release to which you want to upgrade. The installer copies the binary file to the target directory that was defined during installation, and also copies all of the required files to the target directory. For more details, refer to [Installing Genesys Administrator Extension Server](#).
5. If you are migrating from 8.1.x, execute all applicable database upgrade scripts, if necessary. To determine if you have to apply any database scripts, do the following:
 - a. Execute the following SQL statement on your existing GAX database: `select * from db_schema_version.`
 - b. Compare the result with the update scripts in the **resources/sql_scripts** folder in the target directory of the installation.

Tip

The latest database schema versions are:

- asd—8.5.000.01
- opm-arm—8.1.301.01
- Core-8.5.260.11

For example, to upgrade from database schema version 8.1.301.01 to 8.5.260.11, run the following script:

- Oracle: `gax_core_upgrade_db_8.1.301.01_to_8.5.260.11_ora.sql`
- MS SQL: `gax_core_upgrade_db_8.1.301.01_to_8.5.260.11_mssql.sql`
- PostgreSQL: `gax_core_upgrade_db_8.1.301.01_to_8.5.260.11_postgres.sql`

6. As a local user on the host machine, whether in person or via a remote desktop connection, launch GAX and run Setup Mode. Follow the instructions in [Deploying Genesys Administrator Extension](#).
7. (Optional) You can delete the previous GAX Application object after you have verified that the new release is working correctly.
8. To use the System Dashboard feature, you must set up a connection to Solution Control Server (SCS). Refer to the procedure: [Set up a connection to Solution Control Server](#).
9. If you want to view log records in the Centralized Log Database, you must set up a connection to the Log Database through Message Server.
10. If you backed up the **webapp** folder to **webapp_backup**, do the following:
 - a. Stop GAX.
 - b. Copy the plug-in **.jar** files from **webapp_backup** to the new **webapp** folder in the GAX 8.5.x installation folder.
 - c. Delete the **webapp_backup** folder.
 - d. Start GAX.

Clear Cache

Important

This step is not required if you are upgrading from GAX 8.5.000.76 or later to another version of GAX 8.5.0 or GAX 8.5.2.

After upgrading from GAX 8.5.000.73 or earlier, if you have a browser window open with GAX, you must clear the browser cache. This enables the browser to load the content of the upgraded GAX. See [Clearing the Browser Cache](#).

Notes

Keep the following points in mind as you upgrade to GAX:

- Some plug-ins might require additional configuration. Refer to the plug-in documentation for more information about installing and configuring the plug-in.
- You must upload the plug-in installation package into GAX if the plug-in contains new privileges.
- If you are migrating from Tomcat to Jetty, you might need to update the paths used in the **asd** configuration options if they refer to the {CATALINA_HOME} variable that was previously used by Tomcat. For example:

```
asd.silent_ini_path=CATALINA_HOME}/webapps/gax/WEBINF/classes/xmltemplates/ga_default/  
genesys_silent_ini.xml
```

```
asd.local_ip_cache_dir = {CATALINA_HOME}/gaxLocalCache
```

The above two options must be set to a new path, such as:

```
asd.silent_ini_path=./plugin.data/asd/installation/genesys_silent_ini.xml  
asd.local_ip_cache_dir=./plugin.data/asd/gaxLocalCache
```

- Role privileges must be renewed if the application type is changed. Genesys stores role privileges that are associated with the application type to which they apply, but since GAX is associated with Genesys Administrator Server in 8.1.1 releases of Management Framework (for GAX 8.1.2 and higher), not Genesys Generic Server, the role privileges must be set using the correct type.
- Database upgrade scripts that have version numbers prior to the ones from which you upgraded do not have to be executed. You must log in to the database schema as a GAX user and run the commands inside the SQL scripts as commands for the database.
- When you execute the SQL upgrade scripts, make sure that the scripts are properly committed. If your client application has auto-commit switched off, you might have to add the following lines to the scripts.
 - For Oracle: `commit`
 - For MS SQL: `BEGIN TRANSACTION` and `COMMIT TRANSACTION`
 - For PostgreSQL: `commit`