GENESYS™

Web Services and Applications Migration Guide

Web Services and Applications 8.6.0

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Web Services and Applications Migration Guide

Welcome to the *Web Services and Applications Migration Guide*. This document provides information about migrating Web Service and Applications, which includes Web Services API, Workspace Web Edition, and Gplus Adapters. See a summary of chapters below.

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Preparing for the migration

This article describes the setup you should have in your environment in order to migrate Genesys Web Services (GWS) to 8.6 version.

Refer the Genesys Web Services 8.6 deployment guide for more details on network, datastore, sizing, and deployment. Also refer the API changelist to learn the deprecated APIs in GWS 8.6.

Before starting the migration steps, ensure that you complete the following steps:

1. Setup and configure hardware and/or network for GWS 8.6. This setup must be parallel to the existing GWS 8.5 deployment.

2. Deploy datastores for GWS 8.6. The following third-party components are required:

    - Redis 6

    - Elasticsearch 8

    - Read Only copy of Configuration Database or Read Only access to the Configuration Database

    - Optionally, an SQL Database for persistent storage (Postgres 13, MSSQL 2019), if using Custom Contacts or Custom Settings.

3. Optionally, create a new Cloud Cluster and Cloud Application and deploy Genesys Web Services (GWS) 8.6 following the Genesys Web Services 8.6 deployment guide.

Once you have the setup ready, proceed with migration steps.

Migration procedure

This article describes the migration procedure to migrate your data to Genesys Web Services (GWS) 8.6.

1. To facilitate multimedia transfers and consultations between GWS 8.5 and GWS 8.6, upgrade to the latest GWS version 8.5.203.05 or later. For more details, refer Upgrading Web Services and Applications to migrate to the latest 8.5.2 version.

2. Ensure preparation steps described in prepare for migration have been completed.

3. Configure separate GWS 8.6 account in Configuration Server to be used in the following step.

4. Set the following for Configuration Server data migration:

   - **Configure Objects' visibility** - for each object that was configured `import=false` in the **htcc Annex** section of the object or object's folder, remove read permissions from the user account (see environment.yaml username). This ensures the **hidden** folders and objects don't have read permission.

   - If dn-less phone number is used in Genesys Web Services (GWS) 8.5, then switch to using a dynamic-dn solution: In the **interaction-workspace** section of the GWS 8.6 Cloud application, set the following:
     login.voice.prompt-dn-less-phone-number = `false`

     login.voice.prompt-dn-less-phone-number.enable-dynamic-dn = `true`

5. If your current deployment environment has persistent data for Custom Contacts or Settings stored in Cassandra, the following objects from the Persistent Data storage can be migrated:

   - **Contacts**

   1. From the Genesys Web Services (GWS) 8.5 cluster, list the custom contacts by using the following API request:
      `GET /api/v2/contacts?type=Custom`

   2. On the Genesys Web Services (GWS) 8.6 cluster, create the contacts (from above 8.5 list) to **SQL storage** by using the following API request:

      ```
      POST .../api/v2/contacts
      {
          "name":"My Custom Contact",
          "phoneNumber":"123-456-7899"
      }
      ```

   - **Settings**

      - Compare Custom Settings between GWS 8.5 and 8.6 by `GET /api/v2/settings` and in case of any discrepancies contact your Genesys Representative.

   > ## Important
   > If you need further assistance in persistent data migration, contact your Genesys Representative.

6. Deploy GWS 8.6 Node Pools sized for initial group of agents.

7. Move a group of agents from 8.5 to 8.6 environment by using the new URL for 8.6.

8. Ensure the agents moved to 8.6 could perform fundamental contact center operations such as handling calls including consultations, transfer, and so on.

9. Scale down GWS 8.5 Node Pool as necessary.

10. Repeat the process for the next group of agents until all agents are onboarded to 8.6.

11. Scale up GWS 8.6 Node Pools as necessary.

12. If you are using a Web Services and Applications 8.5 API which has been deprecated in Web Services and Applications 8.6, then please contact your Genesys Representative to review.

If your organization uses Gplus Adapter for Salesforce, refer the migration procedure here.

Migrating Gplus Adapter for Salesforce

The Gplus Adapter for Salesforce is an integrated solution that enables Salesforce users to handle contact center interactions seamlessly within Salesforce. The adapter is part of the Genesys Gplus Adapters, which provide out-of-the-box, pre-packaged, and vendor-validated solutions that integrate Genesys' Customer Experience Platform to the leading CRM solutions. The adapter is included in the Web Services and Applications installation package.

Important

Beginning with version Genesys Web Services (GWS) 8.6 and later, the Gplus Adapter for Salesforce is based on Workspace Web Edition (WWE) only.

This article describes the procedure to migrate the Gplus Adapter for Salesforce (an adapter with smaller interface) to Gplus Adapter for Salesforce - Workspace Web Edition (WWE). Beginning with GWS 8.6, Gplus Adapter for Salesforce means the WWE edition of the adapter.

If you used the adapter with the smaller interface, you must migrate to Gplus Adapter for Salesforce based on WWE by using the following procedure:

Tip

The data in Step 7 can be entered directly into an existing Call Center Configuration. Cloning the Call Center Configuration allows a backup of the configuration and opportunity for testing the new configuration.

1. Log into Salesforce.com with your administrator credentials to open the **Home** page.
2. Go to **Setup**.
3. In the **Quick Find** field, type **Call Center**.
4. Click **Call Centers**.
5. Click **Genesys Gplus for Salesforce**.
6. Click **Clone**.
7. Enter the following values:

Parameter	Value
Internal Name	Limited to 40 chars and the first character must be a letter
Display Name	Limited to 40 chars and the first character must be a letter
CTI Adapter URL	https://host:port/ui/crm-workspace/index.html

Parameter	Value
Softphone Height	Recommended: 325 Minimum: 300
Softphone Width	Recommended: 850 Minimum: 500

8. Click **Save**.

9. Add your company domain where Web Services and Applications is installed to the whitelist.

a. Click **App Setup** > **Create** > **Apps**.

b. From the **Apps** list, click the application specific to your Salesforce deployment.

c. Click **Edit**.

d. Scroll down to the **Whitelist Domains** section, and then type your company domain. For example:
   `live.genesys.com:8043`

   If you use the default port (443), you do not need to specify the port.

e. Click **Save**.

Next steps

After you migrate your Gplus adapter, you must provision the call center with users. If you have a previous Salesforce Call Center, remove users from that Call Center and add the users to the new call center you just added.

Removing Multiple Users

To remove multiple users from a call center:

1. Log into Salesforce with your administrator credentials to open the **Home** page.

2. Click **Setup**, found under the **User menu** drop-down list, under your user name in the top right corner, to open the **Force.com** page.

3. From the **App Setup** section on the left side of the screen, click **Customize** to open the customization options.

4. Click **Call Center** to open the **Call Center** page.

5. Click **Manage Call Centers** under the **Call Center** section.

6. Click the name of the call center from which you want to remove the Salesforce user.

7. In the **Call Center Users** section, click **Manage Call Center Users**.

8. Select the **Action** check box next to each user you want to remove.

9. Click **Remove Users**.

Adding Users

You can add new users to your Salesforce call center using the following steps:

1. Log into Salesforce with your administrator credentials to open the **Home** page.

2. Click **Setup**, found under the **User menu** drop-down list, under your user name in the top right corner to open the **Force.com** page.

3. From the **App Setup** section on the left-hand side of the screen, click **Customize** to open the customization options.

4. Click **Call Center** > **Call Centers**.

5. Click the name of your contact center.

6. In the **Call Center Users** section, click **Manage Call Center Users**. You can also access this button from the **Call Center Edit** screen, if you are editing your `callcenter.xml` file.

7. Click **Add More Users**.

8. Specify the search criteria to find the users who you want to assign to your call center. For example, you can search by the **Last name** field.

9. Click **Find** to display the refined list of your search criteria.

10. Select the check boxes for the users that you want to add.

11. Click **Add to Call Center**.

Rolling Migration Back

In case of any issues observed during the migration to Genesys Web Services (GWS) 8.6, you may rollback by having the agents log back into the previous Genesys Web Services (GWS) 8.5 cluster.