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# Performance Management Advisors Deployment Guide

WA Bulk Configuration – Independent Mode

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# WA Bulk Configuration – Independent Mode

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This page describes the bulk configuration of WA contact groups; the bulk configuration tool configures WA rollups outside of the Advisors Administration module.

You can use the tool to rapidly configure WA based on the lists of objects you define and export from other systems and load into temporary structures in the Advisors Platform database. The bulk configuration tool retrieves the data from the temporary structures, validates it, and transforms it into WA rollup configuration. This tool is designed for use in independent configuration mode. For information about the configuration modes and how to set the mode, see [Contact Center Advisor and Workforce Advisor Administrator User's Guide](#). You must select the configuration mode before you perform bulk configuration.

If the independent configuration mode is set, then:

- Agent group-to-application relationships created in CCAdv are not propagated to the configured contact groups mapped to these applications. Instead, the direct network contact center (NCC) contact group-to-agent group mappings are used.
- Applications mapped to contact groups inherit all aggregation properties from those contact groups that are mapped to them. All properties that applications acquire in CCAdv configuration are ignored.
- Agent groups mapped to agent group contact centers (AGCC) inherit all the properties from the contact groups that are mapped to those AGCC. Each contact group can be mapped to only one contact center.

You can map contact groups, which are not mapped to AGCCs, to applications. You can map each such contact group (a contact group mapped to an application) directly to an agent group. In the independent configuration mode, mapping a contact group to an application does not trigger the automatic mapping of all the agent groups already assigned to that application.

You can map contact groups, which are mapped to AGCCs, only to agent groups. Each contact group configured under an agent group contact center has a parent in the form of a contact group mapped to the related network contact center. A combination of participating aggregated objects is derived from the specified parent, and an agent group contact center is automatically created under the derived network contact center, if one does not already exist.

All contact group-related aggregated objects that are derived from the parent (AGCCs, application groups, regions, and operating units) are automatically assigned to the children contact groups. All agent groups associated with the contact group that is mapped to an AGCC are mapped to this same AGCC automatically. Initially, these agent groups are excluded from CCAdv rollup by the bulk configuration tool, unless the agent group is already assigned to a contact center and included in CCAdv.

## Database Structures, Scripts, and Procedures

An object creation script, `blkObjectsCre.sql`, is supplied in the installation package, in the `\bulkconfig\independent\wa.-bulkload` folder. You must execute `blkObjectsCre.sql` as a script – not as a statement – if opened and executed from the SQL Developer SQL Worksheet.

You must apply the `blkObjectsCre.sql` object creation script to the Platform schema to create the following tables, which are required for the contact group bulk configuration:

- blkCgNames
- blkAgCgNames
- blkCgApp
- blkCgAgntGr
- blkAgntGrNames
- blkCgLog

You must create all of the preceding tables, but the content is optional. Any or all tables can remain empty. Empty tables do not impact the configuration in any way.

Objects already present in WA configuration, but absent from these tables, remain in the WA configuration after you perform the bulk configuration procedure.

### Stored Procedure for Bulk Configuration

You implement the bulk configuration by running a stored procedure, `spblkConfigWAIndependent`, which is also created when you run the `blkObjectsCre.sql` script. You execute the procedure against the Platform schema after all base data is prepared in the tables created by running the `blkObjectsCre.sql` script.

### Script to Remove Objects Used in Bulk Configuration Process

The `blkObjectsDrop.sql` script removes all objects used in the bulk configuration (such as the tables that the `blkObjectsCre.sql` script creates). You can execute this script whenever necessary. There is no negative impact because of the presence of these objects; they can be retained. The `blkObjectsDrop.sql` script does not remove any configuration.

### Stored Procedure for Removing Configuration

You can quickly and completely remove all configured WA contact groups, their relationships to applications and agent groups, and agent group contact centers created inside or outside the bulk configuration tool. To remove the configuration, run the `spblkRemoveConfigWA` stored procedure, which is created when you run the `blkObjectsCre.sql` script. Run the `spblkRemoveConfigWA` stored procedure against the Platform schema.

### Important

The procedure will remove all data left from previous configurations that might have a negative impact on the new configurations. It can be very useful before the configuration mode must be changed.

In order to be able to restore the configuration, you must have a reliable set of bulk configuration files or blk tables that you can use to re-load the configuration. Before you execute the configuration removal procedures, make sure that such data exists.

If you do not have a copy of your bulk configuration files or blk tables, you can use the extended export utility to generate a "clean" copy of blk tables from the existing contact group configuration before you run the configuration removal procedure. The extended bulk configuration export utility is supplied beginning with version 8.5.001. See additional details in [Exporting WA Configuration](#).

You also can execute the bulk configuration removal procedures if you are comfortable with the current configuration loss and want to re-configure the applications from the beginning.

The configuration removal procedure does not remove the data from blk files. Those are always preserved unless the tables are dropped by running the blkObjectsDrop.sql script.

## Prerequisites and Preparations

- The application server and XML Generator service must be up and successfully running until the required data (see the following three bullets) displays on the pages of the Advisors Administration module. To ensure that the import runs successfully, check the XML Generator log for import-related errors.
- All relevant applications and agent groups have been automatically imported by XML Generator, and are available for configuration.
- All relevant contact groups have been automatically imported by the WA server from the WFM system(s) specified during Advisors installation, and are available for configuration.
- Prior to bulk configuration, ensure that all relevant application groups, reporting regions, geographic regions, operating units, and network contact centers are configured. You configure these manually using Advisors administration module.

No existing configuration is removed when using the WA bulk configuration tool. If any objects are already configured, or any applications or agent groups are added manually using the Administration module, they are not removed by the bulk configuration tool. The tool adds to the configuration – or changes the mappings of the existing configured objects – based on the data contained in the temporary structures.

If an AGCC does not already exist, one is created by the bulk configuration procedure under every network call center where contact groups have children (in the form of contact groups mapped to agent groups).

Genesys recommends that all aggregated objects participating in WA configuration are activated in Advisors administration module prior to performing bulk configuration. Optionally, you can complete this step after bulk configuration. In either case, it is required to make the objects visible on the dashboard view.

## Bulk Configuration of Contact Groups in WA independent Configuration Mode

The following procedure summarizes the steps to perform contact group bulk configuration when you use WA in independent configuration mode. The information following this procedure provides additional information to assist you.

1. Start Advisors Application Server and XML Generator.

2. Watch the XML Generator and Geronimo logs.

The logs must be free of any import-related errors.

3. Allow the Advisors application to run for approximately 10 minutes.

4. Open the Administration module in the browser.

5. When the aggregated objects are available, configure all those that you plan to use in WA rollups (see [Prerequisites and Preparations](#)).

6. Open each of the following pages and ensure that you can see objects among the available and/or configured object lists, as applicable:

- a. Application Configuration page
- b. Agent Group Configuration page
- c. Contact Group Configuration page

7. Connect to the Oracle or SQL Server instance as the platform user.

8. Execute the blkObjectsCre.sql script in the WA bulk configuration section.

You must execute blkObjectsCre.sql as a script – not as a statement – if opened and executed from the SQL Developer SQL Worksheet.

9. Populate the database tables with your contact group configuration data.

- For information about preparing your contact group data, see [Data Preparation for Contact Group Names, Contact Group Display Names and Aggregated Object Names](#).
- For information about importing the contact group data from spreadsheets to the database, see [Loading Data from Spreadsheets into Temporary Database Structures](#).

10. Execute the spblkConfigWaindependentprocedure.

Oracle:

```
DECLARE
M VARCHAR2(200);
R NUMBER;
BEGIN
"spblkConfigWaindependent"(
M => M,
R => R
);
END;
```

MSSQL:

```
USE <name of Advisors database>
GO
DECLARE @return_value int,
        @r int,
        @m varchar(255)
EXEC spblkConfigWaindependent
        @r = @r OUTPUT,
        @m = @m OUTPUT
SELECT @r as N'@r',
        @m as N'@m'
GO
```

### 11. Verify the log stored in the blkCgLog table.

For information about logs related to the bulk configuration, see [Bulk Configuration Validation and Logs](#).

### 12. Correct the data, if necessary, and go back to Step 8.

If no correction is necessary, go to Step 13.

### 13. Examine the Contact Group Configuration page in the Advisors Administration module to verify the configuration.

### 14. Examine the WA dashboard to verify the configuration.

### 15. Do one of the following:

- a. If you are satisfied with the resulting configuration, connect to the Oracle instance as platform user and execute the blkObjectsDrop.sql script to remove all temporary structures and bulk load procedures.
- b. If you are not satisfied with the resulting configuration, go to Step 12. Alternatively, if you see unpredictable results, and you have a reliable set of bulk configuration data loaded into blk tables, you can remove the whole WA configuration by executing the WA configuration removal procedure. After that you can reload the configuration as described in Step 10. You can remove the whole configuration by executing the spblkRemoveConfigWA procedure. Oracle:

```
DECLARE
M VARCHAR2(200);
R NUMBER;
BEGIN
"spblkRemoveConfigWA"
(
M => M,
R => R
);
END;
```

MSSQL:

```
USE <name of Advisors platform database>
GO
```

```
DECLARE
                                @m varchar(255),
                                @r int
```

```
EXEC spblkRemoveConfigWA
                                @m = @m OUTPUT,
                                @r = @r OUTPUT
```

```
SELECT  @m as N'@m',
                                @r as N'@r'
```

```
GO
```

## Data Preparation for Contact Group Names, Contact Group

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## Display Names and Aggregated Object Names

You can use spreadsheets or CSV files to collect contact group configuration information into a simple file structure that can be loaded into blk database tables.

Alternatively, you can omit the file preparation and load the data directly into blk database tables from the sources available through your relational database management system (RDBMS).

If you use spreadsheets or CSV files to collect your contact group data, use the following sections as guides.

### Contact Groups mapped to Objects other than AGCC

Your spreadsheet or CSV file contains the list of all contact group names that must be configured, together with the corresponding contact group display names, network contact center names, application group names, reporting region, and operating unit names. Your file must contain six columns – seven beginning with release 8.5.001 – with headers (headers are mandatory), and provide the following information:

- Contact Group Name
- Contact Group Display Name
- Contact Center Name
- Application Group Name
- Reporting Region Name
- Operating Unit Name
- Contact Group Include in Rollup Property (for release 8.5.001 and later)

Add relevant data to the spreadsheet or file under the corresponding column headers. You then import this data into the blkCgNames database table. To expedite the import of the data from the file into the database table, use the column names exactly as they are used in the blkCgNames database table.

### Guidelines

Use the following guidelines when you create the spreadsheets to import configuration information about contact groups mapped to objects other than AGCC:

- If a display name, reporting region, or operating unit is not defined, you must leave the related cell empty (that is, do not populate the cell with N/A or any other identifier). Where used, the reporting region or the operating unit must have a valid name – both cells cannot be empty for any given contact group. The whole content of the data row is rejected if any incomplete configuration is detected or there are names that cannot be resolved.
- Each contact group name must match the name contained in the CONTACT\_GROUP.NAME column of the Platform database. Do not put contact groups that need to be mapped to agent group contact centers in the spreadsheet (or table).
- Each contact center name must match the name contained in the CALL\_CENTER.NAME column of the Platform database.



- Each application group name must match the name contained in the APPLICATION.NAME column of the Platform database.
- Each reporting region name must match the name contained in the REGION.NAME column of the Platform database, where TYPE='R'.
- Each operating unit name must match the name contained in the REGION.NAME column of the Platform database, where TYPE='O'.
- An empty cell, or any values in the Include in Rollup properties that are different from Y or N are interpreted as Y (the new Contact Group Include in Rollup Property column is available beginning with release 8.5.001 – see [Contact Groups mapped to Objects other than AGCC](#) above).

### Contact Groups mapped to AGCC

The mapping of contact groups-mapped-to-AGCC to aggregated objects is derived from their parent contact groups, which are already mapped to the relevant network contact centers. Your spreadsheet or CSV file for this information contains the list of all contact group names that must be mapped to agent group contact centers, and further to agent groups. Your file must contain four columns – five columns beginning with release 8.5.001:

- Contact Group Name
- Name of AGCC to which contact group is related
- Parent Contact Group Name
- Contact Group Display Name
- Contact Group Include in Rollup Property (for release 8.5.001 and later)

The parent contact group name is the name of the contact group mapped to the associated network contact center.

Add relevant data to the spreadsheet or file under the column headers. You then import this data into the blkAgCgNames database table. To expedite the import of the data from the file into the database table, use the column names exactly as they are used in the blkAgCgNames database table.

If you supply data in a file related to contact groups mapped to AGCC, then the bulk configuration tool creates a WA configuration with participating agent group contact centers. If the blkAgCgNames database table remains empty, no agent group contact centers are added to the WA configuration. To be included in WA configuration, the child contact group must be specified in a pair with a parent contact group that is already mapped to a network contact center and other aggregated objects. That is, the parent contact group exists among the assigned contact groups in the current WA configuration, or it exists in the blkCgNames database table.

### Guidelines

Use the following guidelines when you create the spreadsheets to import configuration information about contact groups mapped to AGCC:

- If a display name is not defined, you must leave the related cell empty (that is, do not populate the cell with N/A or any other identifier).
- Each contact group name and parent contact group name must match the name contained in the CONTACT\_GROUP.NAME column of the Platform DB.

- An empty cell, or any values in the Include in Rollup properties that are different from Y or N are interpreted as Y (the new Contact Group Include in Rollup Property column is available beginning with release 8.5.001 – see [Contact Groups mapped to AGCC](#) above).

## Contact Groups and Related Applications

The word *application*, as used with Advisors, refers to Advisors objects that originate from the following:

- Genesys ACD and virtual queues
- Genesys interaction queues
- Genesys calling lists
- CISCO call types
- CISCO services

Relationships between contact groups and applications is a necessary part of WA configuration. The functionality of the bulk configuration tool assumes that only contact groups associated with anything other than agent group contact centers can be associated also with applications. Your spreadsheet or CSV file for this information contains two columns:

- Contact Group Name
- Application Name

Add relevant data to the spreadsheet or file under the corresponding column headers. You then import this data into the blkCgApp database table. To expedite the import of the data from the file into the database table, use the column names exactly as they are used in the blkCgApp database table.

### Guidelines

Use the following guidelines when you create the spreadsheets to import configuration information about contact groups and associated applications:

- Each contact group name must match the name contained in the CONTACT\_GROUP.NAME column of the Platform DB. A contact group will be mapped to the specified application only if this contact group is already mapped to something other than an agent group contact center. That is, the contact group exists among assigned contact groups or is mentioned in the blkAgCgNames DB table.
- Each application name must match the name contained in the tmpImportCallType.PeripheralName or tmpImportApp.PeripheralName column of the Platform database.

## Contact Groups and Related Agent Groups

You can associate contact groups mapped to network contact centers with agent groups.

Contact groups related to AGCC can be mapped only to agent groups that are mapped to AGCC and identified as agent groups to include in WA.

Your spreadsheet or CSV file for this information contains three columns:

- Contact Group Name
- Agent Group Name
- AGCC Name

Add relevant data to the spreadsheet or file under the corresponding column headers. You then import this data into the blkCgAgntGr database table. To expedite the import of the data from the file into the database table, use the column names exactly as they are used in the blkCgAgntGr database table.

## Guidelines

- Each contact group name must match the name contained in the CONTACT\_GROUP.NAME column of the Platform database.
- Each agent group name must match the name contained in the tmpImportSkill.EnterpriseName column of the Platform database.
- If necessary, agent group descriptive (display) names can be prepared in a separate file blkAgntGrNames. If the blkAgntGrNames table is populated, the bulk configuration tool applies the agent group descriptive names. The following table shows an example of a blkAgntGrNames file.

### Example of content in an blkAgntGrNames file

AGNTGRNAME	AGNTGRDISPLAYNAME
V_THO_PK_TR_EntertainIP_Generalist_KristallRetention_100	KristallRetention_100_cca
[Tenant1] V_IDR_PK_CF_Kundenbindung_120	Kundenbindung_120

## Loading Data from Spreadsheets into Temporary Database Structures

Import content from the spreadsheets or files into the relevant columns of the corresponding database tables using the Oracle SQL Developer import option (**Import Data ...**). Follow the procedure below.

### Importing Content into Tables

1. Open SQL Developer and register a connection to the Advisors Platform schema.
2. Navigate to the Advisors platform schema, then to each created table.
3. Right-click on a table and select the Import Data ... option from the menu.
4. Navigate to the relevant file and select it.
5. Follow the SqlDeveloper Import Data Wizard instructions; the wizard guides you through the import process.

Ensure that you verify the data for each step of the Data Import Wizard, in particular:

- Review the data on the Data Preview screen to ensure accuracy.

- Ensure that you correctly map columns in the database table to columns in the file. Verify each and every column.
- Verify the parameters before import.

See the SQL Developer documentation if you have questions related to the import of data.

## Bulk Configuration Validation and Logs

The contact group bulk configuration procedure (spblkInsertIntoCg) validates each record in the database blk structures. The procedure does not add a contact group or a relationship to the WA configuration if any data contained in the corresponding tables fails to pass validation or cannot be found (or created) in the database. Instead, the procedure records a message in the blkCgLog table and proceeds to the next record. See [Prerequisites and Preparations](#) and [Data Preparation for Contact Group Names, Contact Group Display Names and Aggregated Object Names](#) for information about correct data preparation.

Examine the log to see if you encountered errors when performing the bulk configuration. If there are errors reported in the log, correct the data in the spreadsheets or files, and reload the content to the related tables and columns. You can also correct the data directly in the tables. You can correct only some of the records leaving the rest intact. When you execute the bulk configuration procedure, the procedure applies changes to objects present in WA configuration and in the bulk configuration tables.

Re-run the procedure to complete or correct the configuration using the updated data. Repeat the process as many times as necessary. The procedure does not remove the mapping of objects already present in WA configuration, but not present in the blkCgNames table, or otherwise damage existing configuration. The procedure applies all modifications and additions that occurred in the blk tables after your previous execution of the procedure. Any deletion of data, however, is ignored.

The resulting configuration can be verified from the Advisor Administration module and on the dashboard.

## Correct Configuration Validation in Advisors Administration Module

Execution of the spblkConfigWAIndependent procedure results in the following configuration, which you can validate in the Advisors Administration module:

- Associates contact groups contained in the blkCgNames table with contact centers (excluding agent group contact centers), application groups, reporting regions, and operating units contained in the related columns. The contact groups for which all the names are resolved (all objects whose names are found in the Platform database) are added to the existing WA configuration and included in the rollup. The procedure also updates display names based on the content in the related column. For example, if the CGDISPLAYNAME column is blank, the existing display name of the contact group, present in the WA configuration, is replaced with the blank name.
- Associates contact groups contained in the blkAgCgNames table with parent contact groups (contact groups associated with network call centers).
- Creates agent group contact centers associated with the derived network contact centers, if the AGCC are not already present.

- Associates contact groups contained in the blkAgCgNames table with agent group contact centers, derived application groups, reporting regions, and operating units. The procedure also includes these contact groups in the rollup and assigns contact group display names. If the CGDISPLAYNAME column is blank, the existing display name of the contact group, present in the WA configuration, is replaced with the blank name.
- Establishes relationships between contact groups and agent groups contained in the blkCgAgntGr table. The table can contain contact groups mapped to contact centers of any type. Each contact group mapped to an agent group contact center is mapped to this agent group contact center, to the contact group related to this agent group contact center, and is indirectly mapped to the parent contact group that is mapped to a network contact center. Each contact group mapped to something other than an agent group contact center is mapped to the specified agent groups directly.
- Assigns descriptive names to agent groups if the blkAgntGrNames table is populated.
- Records the outcome in the blkCgLog table, which you can examine after the procedure exits.

### Exporting WA Configuration

You can export the existing WA configuration into a set of temporary structures compatible with WA bulk configuration. You can then export the structures into delimited files, edit them by adapting to the bulk configuration format and use those for WA configuration in the current or another environment. You can also use the exported structures to compare the actual WA configuration to your expected configuration. Run the blkCfgExp.sql script in your Oracle or MS SQL Server installation to export the data. The script creates and populates, or updates, the following six tables:

- blkExpAgntGrNames
- blkExpCgNames
- blkExpAgccCgNames
- blkExpAgCgNames
- blkExpCgApp
- blkExpCgAgntGr

All entries for which there is a problem contain an explanation of the issue in the Message column of each table. Make sure you always review the content of this column.

Beginning with release 8.5.001, the export utility exports data into 12 tables:

- Diagnostic tables
  - blkExpAgntGrNames
  - blkExpCgNames
  - blkExpAgccCgNames
  - blkExpAgCgNames
  - blkExpCgApp
  - blkExpCgAgntGr

- Clean configuration tables
  - blkAgntGrNames
  - blkCgNames
  - blkAgccCgNames
  - blkAgCgNames
  - blkCgApp
  - blkCgAgntGr

The first six blkExp tables contain expanded configuration data that is presented in a redundant form for diagnostic purposes. As with releases prior to 8.5.001, the Message field contains a warning or error information, where applicable. The other six blk tables contain a "clean" non-redundant copy of your Advisors contact group configuration that can be further used "as is" by the bulk configuration tool.

If, at the time of the export, the Advisors Platform schema already contains the six blk tables, the utility will create a backup copy of each table with the name containing a timestamp.

For example:

- blk12MAY15063407AgntGrNames
- blk12MAY15063407CgNames
- blk12MAY15063407AgccCgNames
- blk12MAY15063407AgCgNames
- blk12MAY15063407CgApp
- blk12MAY15063407CgAgntGr

The timestamp format is: DD MON YY HH24 MI SS

Once the content of the six blk tables is saved into the timestamped backup tables, the tables are cleared and the current Advisors contact group configuration is loaded into them.

Beginning with release 8.5.001, there is no need to adapt the exported diagnostic blkExp data in order to craft Advisor contact group configuration blk structures. The content recorded into the blk tables by the export utility can be used as a data source for the bulk configuration tool. The data can be used for migration to another schema or for re-loading the saved configuration into the same schema after you apply the configuration removal procedure. Genesys recommends that you first verify the content of the diagnostic export tables before loading the configuration data from the blk tables created by the export tool.

The export utility can also be used for saving the versions of Advisors configuration while you are in the process of configuring Advisors. The blkExp data will help to capture and correct a problem as soon as you run the export utility. Any copy of the backup data can be loaded into the blk tables and used for reverting the configuration to any earlier, saved version. Genesys recommends that you use the bulk configuration removal procedure before each configuration load.