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Performance Management Advisors Deployment Guide

Bulk Configuration Overview

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The bulk configuration tool allows you to quickly configure Contact Center Advisor (CCAdv), Workforce Advisor (WA), or both outside of the Advisors Administration module. The tool configures CCAdv, WA, or both 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 CCAdv, WA, or CCAdv/WA rollup configuration.

You can use spreadsheets or CSV files to collect the configuration information into a simple file structure that can be loaded into blk database tables. Templates of Excel spreadsheets are supplied in the installation package.

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).

The bulk configuration procedures for CCAdv and WA can be executed on the Platform Oracle schema or Advisors Platform MS SQL Server database. The configuration logic, rollups, and dashboard views depend on which of the following two configuration modes you select:

- integrated configuration mode: you can configure CCAdv and WA simultaneously if the aggregation mappings of WA contact groups are expected to match the aggregation mappings of the applications related to those contact groups. Set the integrated configuration mode for CCAdv and WA and use the bulk configuration tool for integrated mode. Contact groups listed in the prepared data structures inherit the aggregation mappings specified for the relevant CCAdv applications.
- independent configuration mode: if you require the aggregation mappings to be different between CCAdv and WA, set the independent configuration mode and use the bulk configuration tools for the independent mode.

For information about the configuration modes and how to set the mode, see the [Contact Center Advisor and Workforce Advisor Administrator User's Guide](#). You must select the configuration mode before you perform bulk configuration.

Changes to Bulk Configuration Starting with Release 9.0

The data format for the bulk configuration has changed starting with release 9.0.001.06. You no longer specify the tenant name, switch name, and the filter name as part of the application or agent group name in the bulk configuration structure. If an object has a filter, it needs to be added to the new field that is allocated for that purpose. Adding the content to the fields for the tenant and switch is optional, unless the specified name exists in the Configuration Server as registered under several different tenants or switches. The column names are self-descriptive: AppFilterName, AgntGrFilterName, AppTenantName, AgntGrTenantName, AppSwitchName.

Starting with release 9.0.001.06, the bulk configuration tool is installed by the deployment script. If you plan to use the bulk configuration tool, you need to set the `ccadv.configuration.method.auto` parameter to false and `ccadv.wa.integrated.configuration` to true. Both parameters are located in the CONFIG_PARAMETER database table.

Important

The bulk configuration/export tool for independent mode is not available for installations with MS SQL Server starting with release 9.0.001.06.

NEW For Oracle installations, a bulk configuration/export tool for the independent configuration mode is available starting with Advisors release 9.0.002.09, which is a Hot Fix release. The tool is included with the deployment/migration scripts. For earlier 9.0 releases, a separate installation script is available for an independent configuration mode bulk configuration/export tool. Contact Genesys Support to request this script.

The format of bulk configuration structures in the release 9.0.002.09 bulk configuration tool has changed: the concatenated application and agent group names are no longer used and the parts related to tenant name, switch name, and filter are now recorded in separate fields. Moreover, if an object is unique within a switch or tenant, then the switch and tenant details are optional. You can still upload your bulk configuration files that contain data in the old name format, and then use the bulk configuration script to transform the format to the new one. The `advisors-platform-version_BulkConfigurationTool.sql` script will transform the old format to the new if the specified switch names and filter names are already imported into the Platform database. Re-applying the `advisors-platform-version_BulkConfigurationTool.sql` script does not erase any data. It is safe to apply the `advisors-platform-version_BulkConfigurationTool.sql` and `blkCfgExp.sql` scripts while the application is up and running.

For releases 9.0.001.06 and 9.0.002.03, if you are planning to use the Advisors bulk configuration/export tool in your installation with Oracle, execute the `advisors-platform-9.0.002.09_BulkConfigurationTool.sql` script against the Platform schema. The `advisors-platform-9.0.002.09_BulkConfigurationTool.sql` script and the matching `blkCfgExp.sql` script can be requested from your Genesys services representative. There is only one `blkCfgExp.sql` script for any mode. The script detects the configuration mode automatically and populates the corresponding tables. All bulk configuration tables are present in the schema, but only the ones that correspond to the selected configuration mode are considered.