Performance Management Advisors Deployment Guide

WA Bulk Configuration – Independent Mode

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WA Bulk Configuration – Independent Mode

This page describes the bulk configuration of Workforce Advisor (WA) contact groups; the bulk configuration tool configures WA rollups outside of the Advisors administration module.

If you plan to deploy Pulse Advisors release 9.0.001.06 or later and you will use the bulk configuration tool, then see the Changes to Bulk Configuration section on the Bulk Configuration Overview page in this guide before you proceed.

You can use the bulk configuration 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. Starting with release 9.0.001, the default configuration mode is the independent configuration mode. Previously, the integrated configuration mode was deployed as the default mode.

In releases prior to release 8.5.2, the bulk configuration tool required the presence of the business hierarchy objects (regions, operating units, application groups, and contact centers) in the Advisors configuration. You had to first add the business hierarchy data to the Genesys Configuration Server's **Business Attributes** folder, and then manually activate the same objects using the Advisors administration module. Starting with release 8.5.2, none of that is necessary prior to using the bulk configuration tool; the bulk configuration tool now has a business hierarchy bulk configuration feature. All business hierarchy names will be automatically added to the Advisors configuration and activated. All new business attributes can then be added to the Genesys Configuration Server's **Business Attributes** folder using the migration wizard supplied in the installation package.

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 Database Objects Used in Bulk Configuration Process

The blkObjectsDrop.sql script removes all database objects used in the bulk configuration (such as the tables and procedures 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 or bulk export tables.

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 WA configuration, run the spblkRemoveConfigWA stored procedure, which is created during the Platform database/schema deployment and which is identical for any configuration mode. 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 export utility to generate a "clean" copy of blk tables from the existing contact group configuration before you run the configuration removal procedure. 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

Starting with release 8.5.2, the contact centers, regions, operating units, and application groups that you will use in the bulk configuration structures do not need to be present in the Genesys Configuration Server, nor do they need to be visible in the Advisors configuration pages at the time that you run the bulk configuration procedure. The bulk configuration tool automatically adds all hierarchy objects to the Advisors configuration as long as they are entered in the bulk configuration structures, and if they are not currently present in the Advisors configuration. 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.

Review the following considerations before using the bulk configuration import procedure:

- A contact center will be added to the configuration only if the corresponding Geographic Region name is supplied.
- If a contact center is already present in your configuration, then the bulk configuration import process will make no changes to the existing contact center configuration. NEW Starting with release 9.0, if the geographic region of the existing contact center is "Unknown" while a valid geographic region name is supplied in the bulk configuration structures, the bulk configuration procedure will substitute the "Unknown" geographic region for this contact center accordingly.
- A contact center that is automatically added to the configuration as part of the bulk configuration

process will be assigned the default value for opening ("00:00") and the default value for closing time ("23:59"). If you need to change those values, then you must adjust those properties manually using the **Contact Center** page in the administration module.

- A contact center that is automatically added to the configuration as part of the bulk configuration process will be assigned the local time zone if the contact center name does not match any geographic location in the list of time zones. If the matching location is found in the time zone list, then the time zone associated with that geographic location will be assigned to the contact center. An administrator can adjust the time zone property at any time. It is important to adjust the time zone property in accordance with the actual contact center time zone if the open and close times are different than the default values ("00:00"/"23:59").
- A contact center that is automatically added to the configuration as part of the bulk configuration process will always be of the "Network" type. If you need to create a "Site" contact center, then you must manually configure it on the **Contact Center** configuration page of the Advisors administration module *before* you execute the bulk configuration procedure.
- The application server and XML Generator service must be up and successfully running until the required data (see the following two bullet points) 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.

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).

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.

Procedure:

Steps

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. 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
6. Connect to the Oracle or SQL Server instance as the platform user.
7. 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.
8. 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.
9. Execute the spblkConfigWAIndependent procedure; for example, use the following string with an Oracle schema:

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

   In an MS SQL Server installation, execute the procedure as follows:

```
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
```

10. Verify the log stored in the blkCgLog table.

    For information about logs related to the bulk configuration, see Bulk Configuration Validation and Logs.
11. Correct the data, if necessary, and go back to Step 9. If no correction is necessary, go to the next Step.

12. Examine the Contact Group Configuration page in the Advisors Administration module to verify the configuration.
13. Examine the WA dashboard to verify the configuration.
14. 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 11. 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 9. You can remove the whole configuration by executing the spblkRemoveConfigWA procedure.

       To remove the entire configuration in Oracle installations, execute the following:

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

       To remove the entire configuration in MS SQL Server installations, the procedure calls are done as follows:

```
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 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, geographic region, reporting region, and operating unit names. Starting with release 8.5.2, your file must contain eight columns with headers (headers are mandatory).

Provide the following information in the file:

- Contact Group Name
- Contact Group Display Name
- Contact Center Name
- Geographic Region Name (to allow Contact Center bulk configuration)
- Application Group Name
- Reporting Region Name
- Operating Unit Name
- Contact Group Include in Rollup Property

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, geographic region, 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. If the geograpic region is not provided, and the associated contact center is not yet present in the Advisors configuration, the contact center will not be created and the application configuration will not be added. A corresponding message will be written in the blkCgLog table. If the geographic region is not supplied, but the contact center is already present, no error will be logged, and the application configuration will be added to Advisors rollup configuration, unless other issues are detected. If a contact center is already present in the Advisors configuration, but the geographic region that is supplied in the bulk configuration data does not match the existing geographic region property, no changes will be made to the existing contact center geographic region property. The whole content of the data row is rejected if any incomplete configuration is detected or there are names that cannot be resolved.
- An empty cell, or any values in the `Include in Rollup` properties that are different from `Y` or `N` are interpreted as `Y` (for information about the `Contact Group Include in Rollup Property` column, 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 the following columns with headers and provide the following information:

- 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

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` (for information about the `Contact Group Include in Rollup Property` column, see Contact Groups mapped to AGCC above).

Contact Groups and Related Applications

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

- Genesys ACD and virtual queues

- Genesys DN Groups
- 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. Provide the relationships by supplying the corresponding pairs of contact group and application name. NEW Starting with release 9.0, your file must contain three additional columns with headers (headers are mandatory). Bulk configuration application names no longer require the concatenation [tenant name] [base object name or number] / filter name@switch name. Instead the bulk configuration structure contains separate fields for the former parts of object names. The Application Name column should only contain the base object name or number as it appears in the Configuration Server. The tenant name, filter name and switch name can be provided in separate columns where applicable or if necessary. Your spreadsheet or CSV file for this information contains the following columns:

- Contact Group Name
- Application Name
- NEW Application Switch Name (if applicable, see the Guidelines below)
- NEW Application Tenant Name (if applicable, see the Guidelines below)
- NEW Application Filter Name (if necessary ans applicable, see the Guidelines below)

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. NEW Starting with release 9.0 each column with application names should contain only the base object names or numbers as they appear in the name or number property of the corresponding object in the Configuration Server or in the Name field of the Platform database table CFG_IMPORTED_OBJECTS.
- NEW Starting with release 9.0 the tenant name is provided in a separate column if applicable. If you know that the name of the object is unique across all tenants in the Configuration Server, the tenant name can be omitted.
- NEW Starting with release 9.0 the application switch name is provided in a separate column if applicable. If you know that the name of the object is unique across all switches within the mentioned tenant or across all switches in the Configuration Server, the switch name can be omitted.

- NEW Starting with release 9.0 the filter name is provided in a separate column if applicable. In this case the object will be configured with the object segmentation filter which will be applied to all filterable metrics applicable to the object. The filter will not be applied to the metrics that have "Exclude from Base Object Filter" property enabled. The filtered object configured by the bulk configuration tool will be treated as configured with the object segmentation filter even if the filter itself does not have the "ObjectSegmentationFilter" option (NEW in release 9.0) set to "true" or "yes". In order to be applied in the statistics requests , the filter must be registered in the Configuration Server as a business attribute under the "Advisors Filters" folder and contain the filter definition under the "Filter" section in the "Filter" option. If you already have filters registered in the "Advisors Filters" folder with the definitions contained in the "Description" property, use the migration wizard to move the existing filter definitions into the "Filter" section.

Contact Groups and Related Agent Groups

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

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

Your spreadsheet or CSV file for this information contains the relationships between contact groups and agent groups provided as pairs of the related contact group name and agent group name. NEW Starting with release 9.0, your file must contain 2 additional columns with headers (headers are mandatory). Bulk configuration agent group names no longer require the concatenation [tenant name] [base object name or number] / filter name. Instead the bulk configuration structure contains separate fields for the former parts of object names. The Agent Group Name column should only contain the base object names as they appear in the Configuration Server. The tenant name and the filter name can be provided in separate columns where applicable or if necessary.

- Contact Group Name
- Agent Group Name
- AGCC Name
- NEW Agent Group Filter Name (if necessary , the guidelines are similar to the ones for Applications)
- NEW Agent Group Tenant Name (if necessary, the guidelines are similar to the ones for Applications)

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. NEW Starting with release 9.0 the agent group name must match the Name field content in the Configuration Server or in the Platform database table CFG_IMPORTED_OBJECTS.
- 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. NEW Starting with release 9.0, your file must contain 2 additional columns with headers (headers are mandatory). Bulk configuration agent group names no longer require the concatenation [tenant name] [base object name or number] / filter name. Instead the bulk configuration structure contains separate fields for the former parts of object names. The Agent Group Name column should only contain the base object names as they appear in the Configuration Server. The tenant name and the filter name can be provided in separate columns where applicable or if necessary.

Example of content in an blkAgntGrNames file

In releases prior to 9.0:

AGNTGRNAME	AGNTGRDISPLAYNAME
V_THO_PK_TR_EntertainIP_Generalist_KristallRetention_100/F1	KristallRetention_100_cca
[Tenant1] V_IDR_PK_CF_Kundenbindung_120	Kundenbindung_120

NEW Starting from release 9.0

AGNTGRNAME	AGNTGRDISPLAYNAME	"AGNTGRFILTERNAME"	"AGNTGROUPTENANTNAME"
V_THO_PK_TR_EntertainIP_Generalist_KristallRetention_100/F1	KristallRetention_100		
V_IDR_PK_CF_Kundenbindung_120	Kundenbindung_120		Tenant1

General Data Preparation Guidelines

- If your platform database contains bulk configuration data generated in a previous version, applying the blkObjCre.sql script of the new version in the platform database migrated to the new version will migrate the bulk configuration data to the form required in the new version. If you have bulk configuration data stored outside the database, it can be imported "as is" and then migrated to the form required in the new version by applying the blkObjCre.sql supplied with the new version installation package. It is safe to apply blkObjCre.sql several times. It will migrate the older schema and transform the data as well as preserve the configuration data content.

- If you have a platform database with the existing Advisors configuration but do not have a corresponding copy of the bulk configuration data, you can generate the bulk configuration data in the form required in the new version by applying the bulk export script to the Platform database migrated to the new version. The bulk export script will not remove any existing bulk configuration content. If any, the previous content will be moved to the tables that have identical names with appended timestamps. You can use the content in tables that have "Exp" in their names to review the validity of your current configuration. You then can address the reported warnings or problems by editing the exported bulk configuration data and then by removing and replacing the configuration by using the bulk removal and then the bulk configuration procedure. You also can address the reported issues by applying the changes in the Administration module and verifying the configuration by applying the bulk export script again. The verification process may require several iterations. You can repeat the process until the bulk export procedure does not report any issues in which case the bulk configuration structures will also contain the valid configuration. If the "Exp" content is large, select only the records that have one or more stars '*' in the "Message" field. These would be the messages that require your attention.

See more information in the "Exporting WA Configuration" section of this guide.

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

Procedure:

Steps

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, geographic regions, 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, geographic regions, 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.

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. 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.

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.