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Performance Management Advisors Migration Guide

Pulse Advisors Current

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Genesys Pulse Advisors Migration Guide

Welcome to the *Genesys Pulse Advisors Migration Guide*. This document provides information for migration to Performance Management Advisors/Pulse Advisors releases 8.0 and later. The document also provides a summary of the features and functionality introduced in each generally-available release of Advisors software.

Important

Starting with release 9.0, the name of the Performance Management Advisors family of products changes to Pulse Advisors. In this document, references to the product suite continue to use Performance Management Advisors when discussing software release 8.5.2 and older releases. In this document, any reference made to an Advisors document that is specific to Advisors release 8.5.2 or earlier, or to a document that was discontinued before release 9.0, continues to use the Performance Management Advisors product name in the document title. Other, more general references use the new product name in document titles.

This document is intended for users who are familiar with Advisors deployment procedures. For information about deployment procedures, see the [Genesys Pulse Advisors Deployment Guide](#).

For migration information about other Genesys products, see the [Genesys Migration Guide](#).

Advisors Migration Overview

This document describes migration of the Advisors components from earlier releases (beginning with release 3.3) to release 8.x.

Genesys Pulse Advisors is the following family of products:

- Contact Center Advisor (CCAdv)
- Workforce Advisor (WA)
- Frontline Advisor (FA)
- Agent Advisor (AA)—Available only for Advisors releases prior to release 8.5.2. Discontinued starting with Advisors release 8.5.2.
- Advisors Genesys Adapter (AGA)
- Advisors Cisco Adapter (ACA)—Available only for Advisors releases prior to release 8.5.2. Support for Cisco data sources is discontinued starting with Advisors release 8.5.2.

You must install Advisors Platform to use the Advisors products. For more information about required and optional components, see [Advisors Applications and Adapters](#).

Additional Documentation Resources

The following resources provide additional information that is relevant to the Genesys Pulse Advisors software. Consult these additional resources as necessary.

Important

Starting with release 9.0.0, the name of the Performance Management Advisors family of products changes to Pulse Advisors. The following resources are identified with the Pulse Advisors product name where the resources continue to be available, but older resources that were discontinued before the product name change retain "Performance Management Advisors" in the document title.

- *Pulse Advisors Deployment Guide* describes how to install and configure all Advisors components.
- *Performance Management Advisors Contact Center Advisor - Mobile Edition Deployment Guide* describes how to install and configure Contact Center Advisor - Mobile Edition (CCAdv-ME). Starting with release 8.1.5, there is no longer a standalone installation file for deploying CCAdv-ME; it is an option on the CCAdv installer. Information in the *Performance Management Advisors Contact Center Advisor - Mobile Edition Deployment Guide* was moved to the *Performance Management Advisors Deployment Guide*.

Starting with release 8.5.2, CCAdv-ME is no longer supported.

Starting with release 9.0, Pulse Advisors introduces a mobile-friendly dashboard view for Frontline Advisor, Contact Center Advisor, and Workforce Advisor. The mobile-friendly dashboard views are described in the Pulse Advisors [Frontline Advisor Help](#) and the [Contact Center Advisor and Workforce Advisor Help](#).
- *Pulse Advisors Contact Center Advisor & Workforce Advisor Administrator User's Guide* describes how to perform administration functions for Contact Center Advisor and Workforce Advisor.
- *Pulse Advisors Frontline Advisor Administration User's Guide* describes how to perform administration functions for Frontline Advisor.
- *Performance Management Advisors Cisco Adapter Release Note* provides release-specific information about new features, as well as corrections, modifications, known issues, and recommendations for your Advisors Cisco Adapter software.
Support for Cisco data sources was discontinued starting with release 8.5.2; the Release Note has been discontinued.
- *Pulse Advisors Platform Release Note* provides release-specific information about new features, as well as corrections, modifications, known issues, and recommendations for your Advisors Platform software.
- *Pulse Advisors Contact Center Advisor & Workforce Advisor Release Note* provides release-specific information about new features, as well as corrections, modifications, known issues, and recommendations for your CCAdv/WA software.
- *Pulse Advisors Frontline Advisor Release Note* provides release-specific information about new features, as well as corrections, modifications, known issues, and recommendations for your FA software.
Formerly the *Frontline Advisor and Agent Advisor Release Note*. Agent Advisor was discontinued starting with release 8.5.2.

- *Pulse Advisors Genesys Adapter Release Note* provides release-specific information about new features, as well as corrections, modifications, known issues, and recommendations for your Advisors Genesys Adapter software.
- *Performance Management Advisors Contact Center Advisor - Mobile Edition Release Note* provides release-specific information about new features, as well as corrections, modifications, known issues, and recommendations for your Contact Center Advisor - Mobile Edition software. Also see client-specific Release Notes for CCAAdv-ME:
 - *Performance Management Advisors Contact Center Advisor - Mobile Edition Android Client Release Note*
 - *Performance Management Advisors Contact Center Advisor - Mobile Edition Blackberry Client Release Note*
 - *Performance Management Advisors Contact Center Advisor - Mobile Edition iOS Client Release Note*Starting with release 8.5.2, CCAAdv-ME is no longer supported. The Mobile Edition Release Notes have been discontinued.
- *Pulse Advisors Platform Product Alert* provides important information that applies to the Advisors Platform.
- *Performance Management Advisors Cisco Adapter Release Advisory* provides important information that applies to the Cisco Adapter product.
Support for Cisco data sources was discontinued starting with release 8.5.2; the Release Advisory has been discontinued.
- *Pulse Advisors Genesys Adapter Product Alert* provides important information that applies to the Genesys Adapter product.
- *Pulse Advisors Frontline Advisor Product Alert* provides important information that applies to the Frontline Advisor product.
Formerly the *Frontline Advisor & Agent Advisor Release Advisory*. Agent Advisor was discontinued starting with release 8.5.2.
- *Pulse Advisors Contact Center Advisor and Workforce Advisor Product Alert* provides important information that applies to the Contact Center Advisor/Workforce Advisor product.
- *Performance Management Advisors Contact Center Advisor - Mobile Edition Release Advisory* provides important information that applies to the Contact Center Advisor - Mobile Edition product.
Starting with release 8.5.2, CCAAdv-ME is no longer supported; the Release Advisory has been discontinued.

Preparing for Advisors Migration

Important

Genesys strongly recommends that anyone considering migration of the Pulse Advisors applications should engage Genesys Professional Services for the task.

Starting with release 9.0, the name of the Performance Management Advisors family of products changes to Pulse Advisors. In this document, references to the product suite continue to use Performance Management Advisors when discussing software release 8.5.2 and older releases. In this document, any reference made to an Advisors document that is specific to Advisors release 8.5.2 or earlier, or to a document that was discontinued before release 9.0, continues to use the Performance Management Advisors product name in the document title. Other, more general references use the new product name in document titles.

Use the information on this page to help you prepare for migration of the Advisors components to a new release. To ensure you are prepared for migration, it is important to review the migration procedures before you begin the actual migration work. On this page, there is a list of recommended reading material, as well as important reminders and recommendations.

Reading

- Review [Reminders and Recommendations](#) for information about utilities that may be required to migrate your Advisors components.
- Read the migration procedure that applies to you to ensure that you are fully prepared to perform all the steps. This document contains the following migration procedures:
 - [Migrating the Advisors Applications - 8.1 Releases](#)
 - [Migrating the Advisors Applications - 8.5 Releases](#)
 - [Migrating the Advisors Applications - 9.0 Releases](#)
- Review [Advisors Features by Release](#) for information about new or changed components. For complete information about components, see the [Genesys Pulse Advisors Deployment Guide](#) for the release to which you are migrating.
- Review the [Release Notes](#) for information about known issues, recommendations, and corrections and modifications for the release to which you are migrating.
- Review the [Release Advisories/Product Alerts](#), if applicable, for the release to which you are migrating.

Reminders and Recommendations

- Ensure you have a backup of your current Advisors components and all associated configuration before migration.

- If you install Advisors components on Linux machines, be aware that there are additional security concerns related to Advisors installation. The Advisors installation wizards are graphical installers. To run these installers as they were intended, you require the X Windows System on your Linux machines. Without the X Windows System, passwords that you enter during the installation process display in plain text; therefore, during installation, Genesys recommends that you take extra precautions to ensure that only users with the correct security permissions are allowed to view the screen where you are running the Advisors installers.
- You must migrate Advisors database schemas incrementally. For example, you cannot migrate directly from release 8.0 to 8.1.2. To migrate from release 8.0 to 8.1.2, you would:
 1. Migrate from release 8.0 to release 8.1.0.
 2. Migrate from release 8.1.0 to release 8.1.1.
 3. Migrate from release 8.1.1 to release 8.1.2.

Your installation package contains the migration scripts and tools you require. Run the migration scripts in sequential order. You must manually run each migration script; it is not automated. If you use Oracle databases, you can use SQL*Plus or SQL Developer. If you use Microsoft SQL Server, you can use Microsoft SQL Server Management Studio, or the application of your choice, to run the scripts.

After you run a migration script, and if there are no errors, then start the next script, if more than one is required. Always check the Release Notes, as well as any text files that might be included in the sql folder of your Platform Installation Package, for any additional instructions about running the scripts for each release.

- Ensure you successfully complete the Advisors migration of all components before configuring or enabling any new feature.
- Privileges associated with Role-Based Access Control for Advisors, introduced in Release 8.1.2, are not defined in any existing Advisors role in the Configuration Server settings. If you are migrating from Advisors Release 8.1.1, an administrative user must update existing roles, or create new roles, and add the privileges to allow the described access or activity.
- Beginning in Release 8.1.3, additional privileges for role-based access control are introduced. When migrating to Release 8.1.3, the new privileges are not defined in any existing Advisors role in the Configuration Server settings. After successful migration to Release 8.1.3, an administrative user must update existing roles or create new roles and add the privilege to allow the relevant access or activity. In addition, for subsequent releases, be sure to check the lists of [new features by release](#), available in this guide, for privileges introduced in releases later than release 8.1.3. Advisors RBAC privileges are also listed in the [Pulse Advisors Deployment Guide](#); make sure that you are using the version of the Deployment Guide that is specific to your 3-digit release.
- Beginning in Release 8.1.5, the AGA configuration database is not required because the data moves to Advisors Platform and Genesys Configuration Server. Ensure you understand the changes before migrating. See [Object Migration Wizard](#) in this document, and review the [Data Manager](#) information in the [Pulse Advisors Deployment Guide](#).
- The FA database objects moved to the Platform database in Release 8.5.0. An option to transfer the FA database to the Platform database is included in the Object Migration Wizard in Release 8.5.0 to assist you with the transition. See [Migrating the Advisors Applications – 8.5 Releases](#) and [Object Migration Wizard](#) in this guide.
- Starting with release 8.5.2, you configure Stat Servers as connections to the Advisors Genesys Adapter (AGA) Application object in the Genesys Configuration Server. If you have Advisors release 8.5.1 deployed in your enterprise, then you can use the migration wizard to export the existing Stat Server configuration from the Advisors Platform database to the Configuration Server in order to add the connections to the AGA Application object. See [Migrating Stat Server-Adapter Relationships from the Platform Database to Configuration Server](#) for more information.

Supporting Software Components

Advisors components and all related components (Stat Server, Configuration Server) must be installed on the same network.

All physical servers used in a given Advisors installation must have their system clocks synchronized with a central time server.

Before commencing Advisors migration, ensure that the following external software is installed on the appropriate physical computer involved in Advisors operation:

- Java Development Kit (JDK) – Advisors application support for Java changes starting with release 8.5.2. Check the *Genesys Supported Operating Environment Reference Guide* for information about supported Java versions.
- Apache HTTP Server
If the Apache server is installed on the same machine as Advisors Platform, the Apache server must use a port other than 8080 (which is used by Advisors Platform). In most cases, Apache can use port 80.
- One of the following Relational Database Management Systems (RDBMS):
 - Microsoft SQL Server
 - Oracle (applicable to Releases 8.1 and later)
If you use Oracle, the appropriate Oracle JDBC driver is also required. You can obtain the driver from the Oracle Web site (www.oracle.com).

For information about specific versions of the preceding software components that are compatible with the Advisors release to which you are migrating, see the *Genesys Supported Operating Environment Reference Guide*.

Advisors and the Adobe Flash Player Plugin

Starting with release 8.5.2, the Advisors dashboards (Contact Center Advisor, Workforce Advisor, and Frontline Advisor) no longer require the Adobe Flash Player plugin in order to run. Currently, the Adobe Flash Player plugin is required only on machines on which you run the Advisors administration module.

Using Advisors Installation Wizards on Linux Servers

If you install Advisors components on Linux machines, be aware that there are additional security concerns related to Advisors installation. The Advisors installation wizards are graphical installers. To run these installers as they were intended, you require the X Windows System on your Linux machines.

Without the X Windows System, passwords that you enter during the installation process display in plain text; therefore, during installation, Genesys recommends that you take extra precautions to ensure that only users with the correct security permissions are allowed to view the screen where you

are running the Advisors installers.

Advisors Applications and Adapters

The following Table shows which Advisors adapter to install for each Advisors application.

Important

The Advisors Cisco Adapter is available only for Advisors releases prior to release 8.5.2. Support for Cisco data sources is discontinued starting with Advisors release 8.5.2. Advisors Cisco Adapter release 8.5.100.09 was the final release for this Advisors component.

Application	Cisco Data Source	Genesys Data Source	Mixed Data Sources (Cisco and Genesys)
Contact Center Advisor	No Adapter required	Advisors Genesys Adapter	Advisors Genesys Adapter
Frontline Advisor	Advisors Cisco Adapter	Advisors Genesys Adapter	Advisors Cisco Adapter for the Cisco data source and Advisors Genesys Adapter for the Genesys data source
Contact Center Advisor and Frontline Advisor	Advisors Cisco Adapter	Advisors Genesys Adapter for CCAdv and Advisors Genesys Adapter for FA	Advisors Genesys Adapter for CCAdv (CCAdv does not require an adapter when installed with Cisco data sources). Advisors Genesys Adapter for FA for the Genesys data source and Advisors Cisco Adapter for FA for the Cisco data source. <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <p>Important</p> <p>AGA serving both FA and CCAdv/WA from one system is not recommended for performance reasons.</p> </div>

Contact Center Advisor–Mobile Edition

Before commencing migration, ensure that the following software is installed on the appropriate

physical computer:

- Windows Server or Red Hat Enterprise Linux
- Microsoft SQL Server or Oracle
- Java JDK
- Apache or Apache SSL Secure Web Server
- Advisors Platform
- Contact Center Advisor

Not all releases of CCAdv/ME support all of the preceding software. For compatibility and supported versions of the preceding software, see the [Genesys Supported Operating Environment Reference Guide](#).

Important

Starting with release 8.5.2, CCAdv-ME is no longer supported.

Advisors Features by Release

This section summarizes the significant enhancements in the Genesys Pulse Advisors suite for each release. For detailed information about the Advisors features and functionality in each release, see the Pulse Advisors (formerly Performance Management Advisors) [documentation set](#).

Introduced in Release 9.0.0

- Customers concerned with Adobe Flash vulnerabilities can now run the Advisors administration module as a desktop client application, instead of using the existing Advisors administration web application that requires Flash. Contact your Genesys representative to request the administration module client application.
- The Object Configuration user is now obsolete; you no longer create this user account. The installation wizards no longer prompt you for the Object Configuration user account name.
- To simplify Advisors configuration, the following changes have been made to the Advisors administration module:
 - The **Genesys Adapters** page has been removed from the Advisors administration module. You can query currently-installed adapters directly from the database, if needed.
 - The **Base Object Configuration** page has been removed from the administration module. All CCAAdv/WA agent groups and applications are now directly configurable on the **Application Configuration** page. Objects are now loaded into the administration module and are listed as available for application configuration and the mapping of agent groups.
 - There are changes to the regions, application groups, and contact centers configuration. When these objects are imported into Advisors from the Configuration Server for the first time, all regions and application groups are set to the "Active" state by default and all contact centers are preconfigured and set to the "Active" state. For more information, see [Application Groups and Thresholds](#), [Regions](#), and [Contact Centers](#).
 - For CCAAdv/WA, only applications that you have configured in the application rollup can be mapped to agent groups.
 - For CCAAdv/WA, statistics requests are processed along with the process of configuring applications. The statistics requests are sent when you add an application to the application rollup. For more information, see [Application Configuration](#).
 - For CCAAdv/WA, agent group statistics requests are processed along with the process of configuring application-agent group relationships. Statistics are requested for an agent group as soon as the agent group is assigned to a configured application. For more information, see [Applications - Agent Groups tab](#) and [Agent Group Configuration](#).

If you currently have an Advisors installation with objects configured for your environment, no reconfiguration is necessary when you upgrade to release 9.0. The migration procedures will manage the reconfiguration of object configuration data.

- You now configure an object filter as an Annex option on the filter attribute value. You enter the filter expression in the **Option Value** field when you create the filter option. You can also add a **NameFormat** option to control the filter's display name for presentation purposes. For information, see the [Application Configuration](#) page in the *Genesys Contact Center Advisor and Workforce Advisor*

Administrator User's Guide.

For migrated installations, you must run the migration wizard in order to move existing filter definitions to the Annex section in Configuration Server. Use the **Reconfigure Advisors Filters Business Attributes** option on the migration wizard.

- Changes have been made to bulk configuration. Application and agent group names no longer need to be presented in the form of concatenated tenant name, base object name, switch name, and filter name; that is, [tenant name] [base object name or number] / filter name@switch. Instead, the bulk configuration structure contains separate fields for what was previously the parts of the concatenated object names. The **Application Name** and **Agent Group Name** columns should now only contain the base object name or number as it appears in the Configuration Server. The tenant name, switch name, and filter name are added if applicable or necessary. Applying the 9.0. bulk configuration object creation script to a Platform database that has bulk configuration tables containing the concatenated names used in the previous versions will transform the names as required in release 9.0.
- You can now enable and disable the browser console debug logging for the Advisors user interfaces. The debug logging is turned off by default. You can turn on the console debug logging for the UI by appending the `?adv.debug.on=true` parameter to the URL, and then turn it off again by appending the `?adv.debug.off=true` parameter.
- You can now view the Contact Center Advisor (CCAdv), Workforce Advisor (WA), and Frontline Advisor dashboard data on your mobile device. You can view the full desktop dashboard on your mobile device, if necessary, but the dashboards are available as an optimized view that is intended specifically for mobile device users. For information, see the [Genesys Contact Center Advisor and Workforce Advisor Help](#) and the [Genesys Frontline Advisor Help](#).
- In installations with Oracle, the script has changed that grants Select privileges to the Platform user on views contained in the Advisors Genesys Adapter metrics views. If you are performing a clean Advisors installation, see the [Configure Oracle Metrics Data Sources](#) page in the *Genesys Pulse Advisors Deployment Guide* for more information. If you are migrating to release 9.0 from the previous Advisors release, also see the [Pulse Advisors Migration Procedure - 9.0 Releases](#) page in this Guide.
- In installations with SQL Server, the following server-level collations are supported:
 - **Latin1_General_CI_AS**
 - **SQL_Latin1_General_CP1_CI_AS** (for compatibility with older installations)

The collation of the server and the collation of the database can be different as long as you use one of the preceding collations for each.
- Using the Metric Manager, you can now create Calling List custom metrics based on the Stat Server Outbound Contact Java Extension (OCCStatExtension).
- The following changes have been made to the Advisors Platform Installation Package:
 - The structure of subfolders has been rearranged in the `platform-database-sql/oracle` folder. The content description is in the `WhatsInThisFolder.txt` file. The archive folders contain adjusted scripts for older versions. They are included for use in migrations that involve database versions older than 9.000.06.
 - The [database validation script](#) that Genesys recommended for use with previous releases is now added to the Advisors Platform Installation Package. The `advisors-platform-<version>_ValidateDatabaseInstall.sql` script becomes part of the installation/migration process and you must apply it after all application components are installed and before they are started for the first time.
 - There are new ReadMe files included in the Advisors Platform installation package. The content of all Oracle folders and subfolders is described in the `WhatsInThisFolder.txt` file. The `WhatFolderToUse.txt` file explains how to decide which folder to use (`definer` or `current_user`)

when creating or migrating Oracle databases. The two folders, as well as the `WhatFolderToUse.txt` file, are included in the following three subfolders: `oracleJServer`, `oracleNoJServer`, and `migration`.

- Support has been added for OpenJDK 8. See the Prerequisites section on the [Pulse Advisors](#) page in the [Genesys Supported Operating Environment Reference Guide](#) for more detailed information and a list of all prerequisites.
- Starting with release 9.0.001.06:
 - Contact Center Advisor contains a default rollup configuration. In new Advisors installations, all base objects to which the Advisors user has access display as already assigned to a default Advisors hierarchy; the CCAdv dashboard starts showing the metadata and the real-time data on the initial start of the application. The new CCAdv automated rollup configuration method is turned on by default in installations where the database is newly created using the new database creation scripts. For information, see [Contact Center Advisor Default Rollup Configuration](#) in the *Contact Center Advisor/Workforce Advisor Administrator User's Guide*.
 - The independent configuration mode is now the new default configuration mode for Workforce Advisor. Previously the integrated configuration mode was deployed as the default mode.
 - The default storage location for log files changes. For information about log files, including the default log file storage locations, see [Adjust Logging Settings](#) and [Configure Administrative Actions Logs](#) in the *Genesys Pulse Advisors Deployment Guide*.
 - The URL to request a health check of the Advisors Web Services changes to `http://<host:port>/adv/health</host:port>`. Previously, the URL was `http://<host:port>/adv/rest/health</host:port>`. For additional information, see [Health Check API for the Platform Web Services Node](#) in the *Pulse Advisors Deployment Guide*.
- Starting with release 9.0.002.03:
 - You require Chrome version 66.0+ to run the Advisors user interfaces. Related to this, you can no longer use the Chrome browser on Windows Server 2008 to run the Advisors user interfaces. Windows Server 2008 support for Chrome ends with Chrome version 49.0 and the Advisors user interfaces require, as a minimum, Chrome version 66.0.
 - Dashboard performance was improved. Dashboards load into the browser faster than they did in previous 9.0 releases and are quicker to respond to user activity (better response time for dashboard rendering), even in large configurations and in any supported browser.

Introduced in Release 8.5.2

- The Advisors Platform installation wizard now includes the option to install Advisors Web Services. The Platform server nodes on which you install Advisors Web Services are called the *presentation nodes*. These are the nodes to which all user requests are routed. Installing the Advisors Web Services is sufficient to enable all Advisors dashboards (Frontline Advisor, Contact Center Advisor, and Workforce Advisor).

When you install the WA Server or FA rollup engine server on the Platform server nodes, then the nodes are called *server nodes*. For performance reasons, Genesys recommends that you keep the presentation nodes distinct from the server nodes. That is, install the Advisors Web Services and the server components (WA Server or FA rollup engine) on separate Platform nodes.
- The new Advisors Web Services provide an API to check the health of the web server nodes. For example, the load balancer might access an `/adv/rest/health` URL to check the health of an Advisors Web Services node. This is an unauthenticated resource; it can be accessed without first logging in. The service returns an HTTP status code of 200 when the Web server is up and running. The service returns

- a non-200 HTTP status code when the Web server is not reachable.
- The server-log4j.properties file has been renamed to log4j.properties, and is found in the <Advisors>/conf directory. All Tomcat logging and logging for all Advisors modules (CCAdv/WA/FA) is configured in this file.
- Performance is improved for redundant configurations that use multiple instances of queues that are registered under different switches.
- Support for MS SQL Server 2016 Cluster. See the [Supported Operating Environment Reference Guide: Performance Management Advisors](#) page for more detailed information and a list of all supported databases and database clusters.
- Support for Platform SDK 8.5.
- Support for Apache Tomcat 8. Tomcat version 8.5.23 is packaged with Advisors Platform.
- Support for Java 8 (that is, version 1.8). See the [Supported Operating Environment Reference Guide: Performance Management Advisors](#) page for more detailed information and a list of all prerequisites. Note that Java version 1.7 is no longer supported starting with release 8.5.2. See the Advisors deployment procedures in the *Genesys Performance Management Advisors Deployment Guide* for related updates.
- Support for Red Hat Enterprise/CentOS Linux 7 operating system. Advisors components support 64-bit native mode. See the [Supported Operating Environment Reference Guide: Performance Management Advisors](#) page for more detailed information and a list of all supported operating systems.
- Support for Oracle 12c Release 2. You require the ojdbc8.jar driver for Release 2.
- Support for the Oracle 12c Database In-Memory option.
- Support for MS SQL Server 2014/2016 memory-optimized tables.
- Support for Real-Time Metrics Engine 8.5.103.xx.
- Support for Microsoft Edge browser.
- Support for SAML 2.0 Single Sign-On (SSO). Users can authenticate once with their corporate SSO system, and then switch between Genesys products without having to enter their credentials again. In particular, users of both Genesys Pulse and Advisors can switch between the two applications without having to log into each separately.
- New screens have been added to the Advisors Platform installation wizard to accommodate the following new features:
 - You can now specify the authentication option that will be used in your deployment. You can continue to use the existing Configuration Server-based authentication system or you can select the SAML Single Sign-On (SSO) login process. Note, however, that the Resource Management Console and the "Change Password" and "Forgot Password" functionality are not supported with the SSO login process.
 - You now have the option to specify the URL for your Genesys Pulse installation. Entering the Pulse installation URL adds a link to Pulse in the navigation bar of each Advisors dashboard.
- You can now configure the connectivity between Advisors applications and Oracle databases to use the Oracle Call Interface (OCI). For existing installations where the connectivity uses the Oracle thin JDBC driver, see the *Genesys Performance Management Advisors Deployment Guide* for the procedure to update the connection to use the OCI.
- Database connections support TLS 1.2 (tested with MS SQL Server installations only).
- You can now configure secure TLS connections between Advisors Genesys Adapter and Stat Servers.
- For security purposes, you can separate the database accounts used by DBAs to create Advisors

databases and database objects from the database accounts used by Advisors modules to access and manipulate data at runtime. The *Genesys Performance Management Advisors Deployment Guide* now includes information and recommendations about scenarios in which you can configure Advisors database accounts to use a minimal set of privileges.

- You now configure Stat Servers as connections to the Advisors Genesys Adapter (AGA) Application object in the Genesys Configuration Server. See the *Genesys Performance Management Advisors Deployment Guide* for more information.
- The Advisors migration wizard has been updated to reflect the change in connection configuration between Stat Servers and AGA. When upgrading to Advisors release 8.5.2, you can use the migration tool to export the existing AGA-Stat Server configuration, stored in the Platform database. This automatically configures the connections to the respective AGA Application objects. See the *Genesys Performance Management Advisors Deployment Guide* for more information.
- In a multi-tenant Configuration Server environment, you no longer need to link each Advisors Stat Server to all tenants in the Configuration Server. You can now link a Stat Server to one tenant in the Configuration Server and the statistics will be routed correctly to that Stat Server. This configuration can sometimes help to reduce the load on the Stat Servers.
- The Frontline Advisor supervisor dashboard has been re-designed. Changes to the dashboard include the following:
 - There is now one pane in which to view detailed information about alerts, the **Team Alerts** pane. The **Team Alerts** pane provides all the information that was previously distributed between the **Agent Alerts** and **Team Alerts** panes.
 - You can now pause the dashboard. This preempts automatic data updates until you press the **Play** button to resume the data flow.
 - The dashboard toolbar includes a Data Connection status indicator. The status indicator changes color when you click the **Pause** button on the toolbar, or when there is a problem with connectivity.
 - The dashboard displays a timestamp in the toolbar, which indicates when dashboard data was last updated. Under normal circumstances, the Frontline Advisor dashboard receives data at regular intervals, however, the timestamp changes only when there is new data to display on the dashboard. Users can check the timestamp to determine when updated data was last received. You can use the timestamp to determine the health of the data source, as well. If the timestamp does not update in a long time, check the data source to make sure that it is working correctly.
- Improvements made to the Advisors Web services make it unnecessary to run FA Web services in the single instance, non-distributed mode. As a result, the FA deployment wizard no longer prompts you to choose between a "single instance" or "distributed mode" deployment.
- A configurable setting has been added to the FA accessible dashboard, which limits the number of agents, teams, and levels that can be displayed. The limit defaults to 1000.
- The Contact Center Advisor and Workforce Advisor dashboards have been re-designed. Changes to the dashboards include the following:
 - The dashboards now include an **Alerts** pane in which to view detailed information about alerts. This replaces the **Alerts** pop-up window. The **Alerts** pane provides all the information that was previously available in the **Alerts** window. The **Alerts** pane replaces the **Map** pane of earlier releases.
 - The dashboards now include a **Library** drop-down menu in the toolbar for users who have access to Column Chooser. Users can use the drop-down menu to switch between saved metrics libraries without having to launch the Column Chooser window.
- You can now configure DN Groups as applications for use in Contact Center Advisor/Workforce Advisor (CCAdv/WA). DN Groups provide an aggregated view of the underlying queues. Consider the use of DN Groups as applications for CCAdv/WA in enterprises where it is sufficient to monitor activity at the

"groups of queues" level, rather than drilling down to the individual queue level. In enterprises that have a very large number of queues, configuring DN Groups as applications, instead of queues as applications, can reduce the administrative maintenance effort and can improve system performance.

- This release includes the following improvements to the CCAAdv/WA bulk import and export tool:
 - 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 those objects in 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.
 - The bulk configuration data now includes the Service Level Threshold property for applications. With this addition, the bulk configuration tool covers all application, contact group, and agent group properties that are available in the Advisors administration module.
 - The bulk export tool can now export service level thresholds.
 - The bulk configuration export tool can now export the geographic regions that are required for bulk contact center configuration.
- WA now supports Genesys Workforce Management Server release 8.5.2.
- The accessible dashboards are no longer invoked from the user dashboards. To reach the accessible dashboard, enter its URL into the browser, as documented in the *Genesys Performance Management Advisors Deployment Guide*.

Introduced in Release 8.5.1

- The following Advisors modules are now integrated with Genesys Solution Control Server (SCS):
 - Advisors Genesys Adapter (AGA)
 - Advisors Cisco Adapter (ACA)
 - Contact Center Advisor (CCAAdv) XML Generator
 - Workforce Advisor (WA) Server
 - Frontline Advisor (FA) with the rollup engine

The Windows and Linux services that previously controlled the preceding components have been removed.

Advisors supports warm standby high availability for the modules that are integrated with SCS.

- Advisors Cisco Adapter (ACA) release 8.5.100.09 is the final release for this Advisors component. ACA release 8.5.100.09 is fully supported with Advisors release 8.5.1; that is, ACA is compatible with all 8.5.1 releases of FA, up to and including release 8.5.102.
- You now execute dedicated database procedures against the Advisors Platform database to:
 - register or remove Stat Server instances
 - add, edit, or remove Stat Server configuration settings related to Advisors

You can run the stored procedures whenever necessary. You perform Stat Server configuration adjustments after deployment – that is, after you have run the installers.

- The Source Metrics manager shows Interaction-related actions, available in the Main Mask and Relative Mask drop-down menus when you create a new source metric.

- Advisors alert and action management features can accumulate obsolete historical alert and action management report data that the Advisors application never removes automatically. A maintenance procedure is added to the Platform database that can remove the obsolete data based on configurable criteria. A database administrator can schedule a job or execute the procedure manually to periodically delete CCAdv and WA expired alerts, archived FA threshold violations, or purge key action reports that are associated with expired alerts.
- Custom historical chat and email agent group metrics that use the Short, Medium, or Long time profile group, and which you enable, are available in the Column Chooser for display on the CCAdv dashboard. Previously, CCAdv could display only Short email and chat agent group report metrics on the dashboard.
- In FA, updates to the hierarchy are now dynamic. The FA hierarchy is monitored in real time, with structural changes being reflected almost immediately in the dashboards rather than requiring a 24-hour refresh cycle or a manual hierarchy reload.
- Frontline Advisor and Agent Advisor include an Agent Skills metric. Agent Skills is an agent state metric; it is a default raw report metric with no corresponding source metric. The Agent Skills metric provides the list of configured skills for each agent and the skill levels. Use the Skill filter at the top of the Team pane in the supervisor dashboard to filter the list of agents by agent skill.

To support the Agent Skills metric, you must manually add a new business attribute value to the FA metrics list in the Configuration Server:

```
FrontlineAdvisor.Agent.ALL.AgentSkills
```

- Installer screens related to database connection have been changed. The Basic connection properties for Oracle no longer include SID. Instead, the Oracle service name must be provided. For more flexibility, an Advanced connectivity option is available for both MSSQL and Oracle that allows adding a custom connection string previously prepared in a text file.
- Advisors dashboards support the following browsers:
 - Mozilla Firefox 24.x
 - Microsoft Internet Explorer 10
 - Microsoft Internet Explorer 11
 - Google Chrome 35

Dashboards are available in English, French, or German.

- Support for Genesys intelligent Workload Distribution (iWD) metrics. The supported metrics do not include iWD datamart metrics.
- Advisors now include support for:
 - Microsoft SQL Server Cluster
 - Microsoft SQL Server 2012
 - Oracle 12c databases
- Starting with release 8.5.101:
 - The AGA, CCAdv XML Generator, FA, and WA applications support the Advanced Disconnect Detection Protocol (ADDP) connection to Genesys Solution Control Server (SCS). ADDP is now the default connection type between SCS and the Advisors servers.
 - The **Team** pane of the FA supervisor dashboard now includes a **DN** column. The **DN** column shows each agent's extension or ACD position in a voice environment, or, in a multimedia environment, the channel into which the agent is logged. Related to the new column, there is also a new source metric, AgentState, that derives information about the DN or multimedia channel, as applicable, for each logged-in agent. To display agent DN information on the FA supervisor dashboard, you must enable a new report metric, DN (AgentDN), in the Metric Manager (the metric is disabled, by default).
 - FA includes two new privileges, `FrontlineAdvisor.SupervisorDashboard.Export.canView` and `FrontlineAdvisor.AgentDashboard.Export.canView`, that control access to the **Print** button. Users to whom you assign the relevant privilege can see and use the **Print** button on their dashboard. The **Print** button does not display on the dashboard for users to whom you have not assigned the appropriate privilege.
 - FA can now display an agent's full first name and last name if the agent's first name is recorded in Genesys Configuration Server.
 - A `hierarchy.dynamicUpdate.maxBatchSize` property has been added to the `FrontlineAdvisor.properties` file in the Advisors conf directory. The new property specifies the maximum number of dynamic hierarchy events to process at one time before reconciling these updates with the FA adapter(s). Specifying a maximum ensures that updates are reconciled even when large numbers of events are received continuously. Genesys considers the default value of 1000 to be

large enough to avoid placing excessive load on the FA adapter(s), but you can increase this number if you regularly update more than 1000 objects at once in Configuration Server.

- Subscription to hierarchy updates can be enabled and disabled using the `hierarchy.dynamicUpdate.subscribe` property in the `FrontlineAdvisor.properties` file. Valid values are `true` (enable subscription) and `false` (disable subscription). Reloading of the hierarchy during the scheduled nightly refresh, or through the Administration page, continues to work as previously.
- Starting with release 8.5.101.17, AGA ships with Supervisor Desktop Service (SDS) release 7.6.300.11. The Resource Management Console (RMC) included with AGA release 8.5.101.17 requires SDS release 7.6.300.11 or higher, and is not compatible with earlier releases of SDS.
- Enhancements to RMC:
 - It is no longer necessary to configure RMC users as agents. In other words, RMC users can manage the skills of agents in RMC without being configured as agents themselves. To take advantage of this functionality, you must install SDS 7.6.300.11.
 - You can deploy SDS and RMC on Red Hat Enterprise Linux. See the [Genesys Supported Operating Environment Reference Guide](#) for information about supported operating system versions.
 - Access to agents and agent groups in RMC is more accurately controlled by user permissions saved in Genesys Configuration Server. Read permissions to agent groups and agents, granted in the Configuration Layer, now extend control to the RMC filtering window, as well as the agent list displayed in the RMC panes. For detailed information, see [Configuring RMC Users in the Genesys Configuration Layer](#) section in the *Genesys Contact Center Advisor and Workforce Advisor Administrator User's Guide* and [Agent Groups in the RMC Filter](#) in the *Genesys Contact Center Advisor and Workforce Advisor Help*.
 - If your deployment includes RMC, you must assign a value to a new configuration parameter for JMS messaging. The `ActiveMQ.properties` file in the `Advisors` conf directory now contains the `advisors.user.auth.event.queue.ttl.secs` property, which has a default value of 1, which is not large enough for RMC to function properly. For detailed information, see the [deployment procedures for SDS and RMC](#) in the *Genesys Performance Management Advisors Deployment Guide*.
 - You can configure the new `expectedNumberConcurrentUsers` parameter for RMC to make the application more specific to the user configuration in your enterprise (the default value is 10).
 - There are two new role-based access control (RBAC) privileges associated with RMC that provide additional task permissions: `Advisors.RMC.ManageAgentSkills.canView` and `Advisors.RMC.ManageAgentStatus.canView`.
- You can specify at what time each Stat Server is to reset the statistics daily (that is, for the One day/Growing time profiles). The configuration is applicable to both CCAdv/WA and FA Stat Servers configured on the respective AGA instances. For more information, see [Configure the Daily Reset Time for Statistics on a Stat Server](#) in the *Genesys Performance Management Advisors Deployment Guide*.
- A new Retrieved Calls metric for agent groups and contact groups has been added to CCAdv/WA. The previously-existing Retrieved Calls metric has been re-named to *Completed Calls*. The new Retrieved Calls metric counts answered/retrieved calls as soon as a call is answered.
- Genesys has enhanced the [CCAdv/WA bulk configuration](#) export utility. You can now use the export utility to generate a copy of your bulk configuration tables from existing application configuration, and the copy contains no redundancies.
- The minimum supported version of the Adobe Flash Player is now 20.0.0.286.
- Support for Genesys Stat Server 8.5.1.
- Support for Genesys Workforce Management (WFM) Server release 8.5.2. See release 8.5.101.15 in the [Contact Center Advisor and Workforce Advisor Release Note](#) for additional information about this support.
- Starting with Workforce Advisor release 8.5.102.01, WA supports Genesys WFM API release 8.0. WFM Server releases earlier than 8.0 are not supported with WA release 8.5.102.01 and later. See release 8.5.102.01 in the [Contact Center Advisor and Workforce Advisor Release Note](#) for additional information about this support.

Introduced in Release 8.5.0

- The Performance Management Advisors (PMA) browser has been removed and replaced with a new thin-

client user interface (supported on Firefox v.24.x+) that provides a single landing page for all Advisors. You can open each module in a separate browser tab. Always check the *Genesys Supported Operating Environment Reference Guide* for information about supported browsers and browser versions for each Advisors release.

- You can have two separate deployments of Advisors on the same machine, each with their own independent configuration and their own databases. The port numbers that Advisors modules use to communicate, previously hard-coded, are now exposed in properties files. The Platform installer now accepts and sets configurable port values for Geronimo. See the Performance Management Advisors Deployment Guide for details.
- In the Administration module, Metric Manager has been improved:
 - The **Source Metrics** page provides a user interface for maintaining statistic-type definitions from Stat Server. You can create custom source metrics for Agents, GroupAgents, Queue, and CallingList objects.
 - The **Report Metrics** page enables you to create custom Contact Center Advisor (CCAdv) agent group metrics and Frontline Advisor agent metrics. In release 8.5.0, you cannot create custom metrics for Workforce Advisor (WA).
- You can reduce the volume of statistics collected, and potentially reduce the number of Stat Servers used, by grouping raw report metrics and configuring metric applicability for source objects in the Configuration Server.
- Advisors Platform now supports a backup Configuration Server.
- The Frontline Advisor Oracle schema/MS SQL database has been removed from the installation. Frontline Advisor data has been moved to the Advisors Platform Oracle schema/MS SQL database.
- You can define metric display names and descriptions in English or German in the Metric Manager. Those names and descriptions are then displayed in the Advisors applications when you choose one of those languages on login.
- Advisors Genesys Adapter supports the Outbound Contact Campaign CallingList object.
- Performance Management Advisors components supported connection to Oracle Real Application Clusters (RAC) starting in release 8.1.4. Advisors now fully support RAC functionality such as High Availability and failover, as well.
- Starting in release 8.5.001, the following features are also available:
 - You can create custom agent group report metrics using capacity rules. Capacity rules define an agent's ability to handle multiple, simultaneous interactions of differing media types on both single-media and multimedia DNs. These custom report metrics can track:
 - maximum interactions
 - routable interactions
 - current interactions
 - You can configure the prefix to be used as part of the internal short name for custom report metrics. Previously, Advisors created an auto-generated short name that used the CM prefix, which you could not change.
- In the Metric Manager, you can search by metric name or description in German, as well as English, regardless of the language option you selected at login.
- You can place point-in-time metrics in a time profile group: Short, Medium, or Long. Previously, point-in-time metrics were displayed on the dashboard independently from the time profile group selection.
- You can enable or disable FA report metrics by time profile using the Report Metrics manager. You

continue to use the FA time profile configuration field in the FA administration Settings tab to configure the time profile durations, as well as to disable a time profile at the FA module level.

- You can configure whether or not the Time in Reason code part of the Reason code metric displays on the dashboard.
- The *Performance Management Advisors Deployment Guide* includes information about how to use Advisors in a Cold Standby mode of operation. Cold Standby is a form of High Availability.
- Performance Management Advisors release 8.5 supports the following versions of Genesys Management Framework and Stat Server:
 - Release 8.5.000 supports Genesys Management Framework up to, and including, release 8.1.3.
 - Release 8.5.001 supports Genesys Management Framework up to, and including, release 8.5.
- Performance Management Advisors support the following:
 - Release 8.5.000 supports Stat Server up to, and including, version 8.1.2. Advisors release 8.5.001 adds support for Stat Server version 8.5.
 - Genesys Workforce Management 8.1.2
 - Java SE Development Kit 7
 - Red Hat Enterprise Linux 6.0 64-bit native
 - Windows 8 64-bit Native
 - Windows Server 2012 64-bit native
 - Apache 2.4

Introduced in Release 8.1.5

- Starting in Release 8.1.5, permissions for user accounts are loaded when users log in to the Advisors browser. This affects the availability of objects in the browser:
 - In general practice, if a user is logged in to the Advisors browser, and a new object is added to Genesys Configuration Server, it is not added to the user's view until that user logs out and logs in again (if the user has the necessary security permission to view the object). The reverse is also true: when a user's access to an object is removed while that user is logged in, access to the object is not revoked until the user logs out and logs in again.
 - To see objects that were activated or removed in Advisors after the user logged in, that user must log out and log in again.
- Performance Management Advisors format numbers that display on the dashboard modules based on the language you selected in the Advisors browser, regardless of the system setting for Locale on the server. For example, if you log in to the German-language Advisors browser, but the system setting for Locale on the server is English, the numbers on your Advisors dashboard are formatted in the German style. Prior to Release 8.1.5, the number format depended on the Locale setting on the server.
- The following general changes have been made to the navigation pane in the Administration module:
 - The Frontline Advisor Administration component is embedded in the Advisors Administration component, consolidating administration of CCAAdv, WA, and FA within one Administration module in the Advisors browser. To access the Frontline Advisor page in the Administration module, you must have access permissions to both Frontline Advisor Administration

(FrontlineAdvisor.Administration.canView) and Advisors Administration (AdvisorsAdministration.canView).

- The Object Configuration page in the Administration module is now the Base Object Configuration page, and is no longer included in the Genesys Adapters section of the navigation pane.
 - The Manage Adapters page is read-only.
 - The navigation link to the Agent Group Configuration page is moved below the links to the Application and Contact Group Configuration pages.
 - The layout and content of the Agent Group Configuration and Contact Group Configuration pages have been updated; the contact center column and the contact center drop-down list now show the network contact center (NCC) name with the agent group contact center (AGCC) name, and uses the format NCC:AGCC.
 - Performance Management Advisors support Genesys Management Framework up to, and including, Release 8.1.3.
 - An additional configuration mode is added to Contact Center Advisor (CCAdv) / Workforce Advisor (WA), which enables you to implement WA configuration that does not depend on the existence of CCAdv configuration or CCAdv object mappings. The Administration System Configuration page contains a new option for CCAdv/WA configuration mode, which you can set as follows:
 - yes: for Integrated CCAdv/WA Configuration mode
 - no: for Independent CCAdv/WA Configuration mode

If Independent Configuration mode is selected, you can now directly map agent groups to contact groups mapped to Network Contact Centers on the Contact Group-Agent Group tab of the Contact Group Configuration page.

If Independent Configuration mode is selected, a contact group can be associated with an application that is not mapped to any contact center, application group, region, or operating unit. The application inherits those properties from the contact group associated with it.

If Independent Configuration mode is selected, a contact group can be associated with an agent group that is not mapped to any application. The agent group inherits contact center and application group properties from the contact group associated with it.
 - You can now map an agent group to multiple contact groups.
 - New bulk configuration tools are provided for CCAdv and WA, which enable you to configure applications, contact groups and their relationships to agent groups outside the Administration module. An additional configuration export/diagnostics tool is also provided. The new tools are found in the installation package, in folders `\sql\mssql\bulkconfig` and `\sql\oracle\bulkconfig`.
 - CCAdv/WA now support interaction with Data Manager. Metadata previously stored in the Advisors Genesys Adapter configuration database is now found in the Platform database and Configuration Server.
 - The Alerts window was previously called the Alerts pane or panel. You can open the Alerts window from the Map pane as you always did. The Alerts window has been re-designed in Release 8.1.5, and includes the following changes:
 - You can scroll through the alerts of each contact center automatically or manually.
 - Inactive alerts display for a few seconds before they are removed from the Alerts window.
 - The Alerts window now displays the difference between the last refresh of the metric value and the current metric value, as well as the percentage of the absolute difference.
 - An expanded Alert cell in the Alerts window displays a spark line to indicate the history of the alert
-

since the Alerts window was opened. Red or yellow spark line bars indicate the values that triggered a threshold alert.

- CCAAdv and WA metric graphing changes:
 - The time slider attributes are maintained when you log out and log in again.
 - The five default colors used in the graph are more easily distinguished from one another; the color values have greater contrast.
 - If metrics are not defined for an object, they are not available to graph.
 - You can graph multiple time profiles for a metric simultaneously.
- Role-based access control (RBAC) extends to the Alert Management Reports window and the Alert Management tab. You can view action reports only if you have permission to see the aggregating objects and metrics of the alerts to which the reports are related.
- Workforce Advisor is horizontally scalable. The WA server can be deployed on one node, and more than one instance of the WA web services can be deployed on other nodes in the same cluster of Advisors. This permits a larger number of simultaneous users of WA.
- CCAAdv supports 1500 concurrent users per installation and WA supports 1500 concurrent users per installation.
- During component upgrades, installation packages preserve the configured `Warehoused.metrics.max.minutes.kept` value.
- Frontline Advisor (FA) can operate in a distributed, or clustered, mode. In distributed mode, all FA instances share the Platform database and FA database. Only one FA instance, the FA engine, performs metric aggregation. The other FA instances, which provide FA web services, retrieve dashboard data and metrics from the FA engine. Together, the FA web instances provide the presentation layer.
- The following performance enhancements have been made to Frontline Advisor:
 - Frontline Advisor now supports 1500 concurrent users with a maximum dashboard age of 30 seconds for State metrics, 95% of the time, and a maximum dashboard age of 2 minutes for Performance and Rule metrics, 95% of the time.
 - Frontline Advisor now performs metric rollups in memory. Previously, FA performed the metric rollups through database stored procedures.
- Metadata previously stored in the Advisors Genesys Adapter database related to Data Manager functionality is now found in Advisors Platform and Genesys Configuration Server. The configuration database for Genesys Adapter is no longer required and has been removed. If you are upgrading to Release 8.1.5, you use the Advisors Object Migration Wizard to migrate data from the Genesys Adapter configuration database to Advisors Platform and Configuration Server. Changes related to this new functionality include the following:
 - Changes in the type of files supplied in the installation package.
 - Updates to the installation screens used to deploy AGA.
 - Introduction of a new user account (the Object Configuration User account), which you configure in Configuration Server.
- Advisors Genesys Adapter supports Genesys Platform Software Development Kit (PSDK) to Release 8.1.2.
- Performance Management Advisors support encryption of Advisors Genesys Adapter metrics database data.
- Genesys Cisco Adapter can connect to Oracle Real Application Clusters (RAC). RAC functions such as

High Availability and failover are not supported. Other Advisors components supported connection to RAC servers in Advisors release 8.1.4; see [Major enhancements in Advisor Suite functionality for Release 8.1.4](#) for additional information.

Introduced in Release 8.1.4

- New performance metrics added to Frontline Advisor:
 - Thirteen new source metrics added to the metrics configuration table (metric IDs ranging from 500 to 512 inclusive).
 - New source and computed performance metrics, including metrics that are disabled until you configure an associated filter for each (available in stored procedures in the FA database).
 - Advisors Platform, Advisors Genesys Adapter, Contact Center Advisor/Workforce Advisor, and Frontline Advisor can connect to Oracle Real Application Clusters (RAC). Advisors Cisco Adapter supports connection to RAC servers starting in Advisors release 8.1.5; see [Major enhancements in Advisor Suite functionality for Release 8.1.5](#) for additional information.
- Starting in Release 8.1.401:
 - French is added as an option for language and country settings. English and German continue to be options.
 - Performance Management Advisors are compatible with Oracle Java 1.7.
 - Performance Management Advisors can use a Transport Layer Security (TLS) connection to Genesys Configuration Server.

Introduced in Release 8.1.3

- A Metric Manager page is added to the Administration module. Metric Manager replaces the Metrics page. All CCAAdv/WA metrics can be viewed in the Metric Manager, and the display attributes for all metrics can be updated. In Release 8.1.3, you can create custom application metrics using existing source metrics provided by Advisors Genesys Adapter and existing application metrics (you cannot create agent group or contact group metrics).
- Use the Time Profile for Charting property in the Metric Manager to enable up to five metrics for graphing.
- The Metric Graphing window functionality has the following changes:
 - Access to the Metric Graphing window is now available as an option within the row in which you select an object or application for graphing. Previously, the button was only available above the Contact Centers and the Applications panes.
 - You can access the Metric Graphing window from Workforce Advisor, which was previously unavailable.
 - You can graph WA forecast and real-time metrics.
 - Both Contact Center Advisor and Workforce Advisor metrics can be displayed within the same Metric Graphing window.

- You select the graphing style within the Metric Graphing window.
- CCAAdv and WA support JAWS Standard version 11, an accessibility interface for users with visual impairment. JAWS software provides audio and a series of keyboard shortcuts for navigating the tabulated information on the screen.
- Additional privileges are added for Role-Based Access Control within Contact Center Advisor, Workforce Advisor, and Frontline Advisor.
- The Genesys Adapter installer includes additional Stat Server configuration options. You can now specify the types of statistics supported on the Stat Server pair you are associating with a Genesys Adapter instance. For example, you can choose to collect core statistics only on certain pairs of Stat Servers and third-party media statistics on other specific pairs.
- There is additional configuration in Configuration Server to enable identification of NonVoiceOnly virtual queues. If you want only third-party media statistics to be requested on certain virtual queues, those virtual queues must be identified in the Configuration Server.
- The Show Totals and Averages Row for Agent Groups option on the System Configuration page of the Administration module now hides the Totals and Averages row in both the Contact Center Advisor and Workforce Advisor Agent Groups panes. Previously, it affected the Agent Groups pane in the Contact Center Advisor dashboard only.
- A Default Grouping section is added to the System Configuration page in the Administration Module. Use the drop-down lists to change the default grouping selection for the CCAAdv and WA Contact Centers panes.
- Column Chooser for Frontline Advisor now has the appearance and functionality of the Contact Center Advisor Column Chooser. Agents also use Column Chooser, which replaces the Configure pane on Agent Advisor.

Introduced in Release 8.1.2

- Removal of Administrative Partitioning (replaced by functionality in RBAC).
- Support for role-based access control (RBAC)—Access to business objects, hierarchies, and metrics is now controlled using roles and permissions that are created in Genesys Configuration Server, and whose configuration is completed in the Advisors Administration module. RBAC replaces the Administrative Partitioning feature of the previous release.
- Further integration with Genesys Management Framework, including management of user profiles, functionality permissions, and creation of business objects.
- A new Advisors Migration wizard supports CCAAdv/WA business objects and FA metrics migration.
- Improved internal support for Stat Server load balancing—The relationship between a statistic and the Stat Server pair against which it is requested is now maintained during refresh or restart of the Adapter. Statistics continue to be requested from the same Stat Server(s) after an Adapter refresh or restart as was used prior to the restart. Genesys Adapter no longer depends on the value set for the Stat Server old-stats-remove-interval option.
- When you install Frontline Advisors (FA), you can now specify a Persons folder in Configuration Server to be the root for the FA hierarchy. If you specify a Persons folder as the root, the hierarchy is read and loaded from that Persons folder at FA (re)start and when you use the reload feature.
- The FA Manager Console supports features of JAWS Standard version 11, an accessibility interface for users with visual impairment. Keyboard shortcuts can be used in conjunction with screen reader accessibility software (JAWS) as an alternative to the standard browser navigation.

- The Data Manager feature is implemented in this release. The Data Manager feature provides support for multiple Genesys and Cisco Adapters and load balancing across multiple adapters using the same data source (in a single Genesys environment).
- Support for Genesys Stat Server 8.1.
- Support for logging of changes made in the Administration module.
- A threshold's direction is now established on a per-threshold basis, rather than on a per-metric basis.
- Support for multilingual templates for email in German, English, or both languages.
- Full compatibility with Adobe Flash version 11.
- Support for Genesys PSDK 8.1.
- Updates to Contact Center Advisor–Mobile Edition make it compatible with Advisors Platform release 8.1.2 and with Contact Center Advisor/Workforce Advisor release 8.1.2.

Important

Contact Center Advisor–Mobile Edition Release 8.1.2 maintains the features and functionality of the 8.1.1 Mobile Edition product. CCAdv-ME does not include features introduced in Advisors Platform and Contact Center Advisor Release 8.1.2.

Introduced in Release 8.1.1

- Administrative Partitioning—A partition is a means by which Advisors objects can be grouped into business areas for the purposes of administration.
- Significantly updated Administration user interface, which permits more flexible configuration.
- User authentication through the Configuration Server.
- Hierarchy management through the Configuration Server for Frontline Advisor.
- Metric Graphing enhancements for Contact Center Advisor.
- Additional time profiles for Frontline Advisor.
- Support for MS SQL 2008.
- Support for Oracle.
- Support for capacity rule metrics.
- Metric filtering (ability to add filters on a per-metric basis as distinct from a per-object basis).
- Additional agent group metrics.
- Implementation of Genesys system requirements.

Introduced in Release 8.0

- UI enhancements in the CCAAdv, WA, FA, and AA dashboards, including:
 - Updated Dashboards to match the Genesys look and feel.
 - Introduction of a new Alerts pane.
 - Redesign of the Column Chooser.
 - Simultaneous display of metrics from different time periods on the CCAAdv and WA dashboards.
- Support for multimedia metrics (Web chat and email) has been added.
- Custom metrics have been introduced, allowing the customer to configure certain sets of metrics based on their business needs.
- Users can now save their metric selections using the Metric Libraries functionality. This allows users to quickly switch between different views on the CCAAdv and WA dashboards.

Introduced in Release 3.3

- Support for virtual agent groups that utilize the logged-in script as part of the group definition.
- Normalization of metrics between CCAAdv and WA.
- Introduction of Metric Graphing. This feature allows users to see trends in certain metrics over an extended period of time.
- Dashes are now displayed for metrics for a particular object where those metrics cannot be retrieved from the data source from which the object came.

Migration

This section contains two migration procedures:

- [Pulse Advisors Migration Procedure – 8.1 Releases](#)
- [Pulse Advisors Migration Procedure – 8.5 Releases](#)
- [Pulse Advisors Migration Procedure – 9.0 Releases](#)

Read the procedure relevant to your migration before you begin to ensure that you are fully prepared to perform all the steps.

Pulse Advisors Data Migration Paths

Typically, Advisors data migration from an originating version to a target version must include migrations to all of the target releases that exist between the originating and the target versions, although some exceptions apply. Follow the notes in the tables on this page (see [Data Migration Paths](#)) to be sure that you are migrating your Advisors data correctly. The information on this page is specific to migrations from release 8.5.101.09 to release 9.0.002.03. This guide also contains additional information about [migrating databases to Advisors release 8.5.2](#).

See general migration procedures on the following pages:

- [Pulse Advisors Migration Procedure – 8.1 Releases](#)
- [Pulse Advisors Migration Procedure – 8.5 Releases](#)
- [Pulse Advisors Migration Procedure – 9.0 Releases](#)

In Oracle installations, the migration to each target version involves the migration of both the Advisors Genesys Adapter (AGA) metrics schema and the Advisors Platform schema of the same version. In other words, you cannot migrate the Platform schema through all versions that exist between the originating version and the target version but then migrate the AGA metrics schema from the originating version directly to the target version; the AGA metrics schema must be migrated incrementally as well.

In all cases on this page where it states that you must execute one specific script and you choose to run its SQL*Plus version, then you must execute the script from its original folder or its exact copy. This is because SQL*Plus versions of the scripts normally call other scripts that are expected to be in the same folder. The SQL*Plus version of the scripts contain "plus" in their names when directly executed.

In MSSQL installations, Genesys recommends that you migrate the Platform database to every version between the originating and the *pre-target* version. Then follow the migration instruction for the target version to bring the AGA, Platform, and metric graphing schema to the target version. For example, if the migration is done from version A to C with B as the intermediate version between A and C:

1. Perform the Platform database migration from A to B.
2. Next, perform the AGA metrics database migration from version A directly to version C (skipping over version B).
3. Finally, migrate the Platform database from version B to C.

Depending on the MSSQL Server version and the database content, some migration scripts that are used to migrate from an originating to a pre-target version can issue `Invalid column name` errors. You can ignore such errors, while the migration to target versions should be error-free.

The metric graphing schema can be migrated directly from the originating version to the target version in either installation, Oracle or MSSQL.

In addition to the database content, Advisors components depend on some data held in the Configuration Server. You might also need to migrate or append the data in the Configuration Server

as part of the migration process. To do this, you use the Migration Wizard. You must use the Migration Wizard in the following scenarios:

1. If you decide to enable metrics that are not yet present in your Configuration Server.
2. If you use metric filters or object segmentation filters and you migrate to version 9.0.000.06 or later.
3. If you plan to use the default rollup configuration mode and your target version is 9.0.001.06 or later.

Data Migration Paths

Click a link to see the table of information specific to that migration path:

[Migrating from 8.5.101.09 to 8.5.101.17](#)

[Migrating from 8.5.101.17 to 8.5.101.21](#)

[Migrating from 8.5.101.21 to 8.5.102.00](#)

[Migrating from 8.5.101.21 or 8.5.102.00 to 8.5.201.26*](#)

[Migrating from 8.5.101.21, 8.5.102.00, or 8.5.201.26* to 8.5.202.09](#)

[Migrating from 8.5.202.09 to 8.5.202.10](#)

[Migrating from 8.5.202.10 or 8.5.202.09 to 9.0.000.06](#)

[Migrating from 9.0.000.06 or 8.5.202.09 to 9.0.000.10](#)

[Migrating from 9.0.000.10 to 9.0.001.06](#)

[Migrating from 9.0.001.06 to 9.0.002.03](#)

[Migrating from 9.0.002.03 to 9.0.002.09](#)

[Migrating from 9.0.002.09 to 9.0.003.04](#)

[Migrating from 9.0.003.04 to 9.0.003.09](#)

* Advisors release 8.5.201.26 is included in the following tables for those who installed this version (it was a restricted-access release). If you did not install release 8.5.201.26 in your environment, then you can omit migration path steps that include that release.

Originating version	8.5.101.09
Target version	8.5.101.17
Script to migrate to the target version from the original version	advisors-platform-migrateSchema_8.5.101.09_8.5.101.17.sql
AGA schema dependencies	<p>Before you apply the Platform migration script, migrate the AGA metrics schema to the target version by connecting as the AGA metrics schema owner and running any gc_metrics_<targetversion>_Objectsxxx.sql script for Oracle or gc_metrics_db_<target version>.sql script for MSSQL Server installations. There is no need to drop any AGA metrics objects before applying the script. Once the corresponding script is applied, in Oracle installations grant select privileges to the Platform schema owner as follows:</p> <pre>GRANT SELECT ON AGENT_SKILL_GROUP_REAL_TIME TO &&PLATFORM_SCHEMA_OWNER; GRANT SELECT ON CALL_TYPE TO &&PLATFORM_SCHEMA_OWNER; GRANT SELECT ON CALL_TYPE_REAL_TIME TO &&PLATFORM_SCHEMA_OWNER; GRANT SELECT ON CONTROLLER_TIME TO &&PLATFORM_SCHEMA_OWNER;</pre>

	<pre>GRANT SELECT ON INTERACTION_QUEUE TO &&PLATFORM_SCHEMA_OWNER; GRANT SELECT ON INTERACTION_QUEUE_REAL_TIME TO &&PLATFORM_SCHEMA_OWNER; GRANT SELECT ON LOGICAL_INTERFACE_CONTROLLER TO &&PLATFORM_SCHEMA_OWNER; GRANT SELECT ON PERIPHERAL TO &&PLATFORM_SCHEMA_OWNER; GRANT SELECT ON PERIPHERAL_REAL_TIME TO &&PLATFORM_SCHEMA_OWNER; GRANT SELECT ON QUEUE_SET1_REAL_TIME TO &&PLATFORM_SCHEMA_OWNER; GRANT SELECT ON QUEUE_SET2_REAL_TIME TO &&PLATFORM_SCHEMA_OWNER; GRANT SELECT ON SERVICE TO &&PLATFORM_SCHEMA_OWNER; GRANT SELECT ON SERVICE_MEMBER TO &&PLATFORM_SCHEMA_OWNER; GRANT SELECT ON SERVICE_REAL_TIME TO &&PLATFORM_SCHEMA_OWNER; GRANT SELECT ON SKILL_GROUP TO &&PLATFORM_SCHEMA_OWNER; GRANT SELECT ON SKILL_GROUP_REAL_TIME TO &&PLATFORM_SCHEMA_OWNER;</pre> <p>Proceed to the Platform schema migration.</p>
<p>Platform schema migration specifics</p>	<p>In Oracle installations, before the Platform migration script is applied, ask your DBA to verify that the Platform schema owner is granted the following privileges:</p> <pre>CREATE SESSION,CREATE TABLE,CREATE OPERATOR,CREATE TYPE,CREATE TRIGGER,CREATE INDEXTYPE,CREATE PROCEDURE,CREATE SEQUENCE,CREATE VIEW,CREATE MATERIALIZED VIEW.</pre>

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<p>Originating version</p>	<p>8.5.101.17</p>
<p>Target version</p>	<p>8.5.101.21</p>
<p>Script to migrate to the target version from the original version</p>	<p>advisors-platform-migrateSchema_8.5.101.17_8.5.101.21.sql</p>
<p>AGA schema dependencies</p>	<p>Before you apply the Platform migration script, migrate the AGA metrics schema to the target version by connecting as the AGA metrics schema owner and running any gc_metrics_<targetversion>_Objectsxxx.sql script for Oracle or gc_metrics_db_<target version>.sql script for MSSQL Server installations. There is no need to drop any AGA metrics objects before applying the script. Once the corresponding script is applied, in Oracle installations grant select privileges to the Platform schema owner as follows:</p> <pre>GRANT SELECT ON AGENT_SKILL_GROUP_REAL_TIME TO &&PLATFORM_SCHEMA_OWNER; GRANT SELECT ON CALL_TYPE TO &&PLATFORM_SCHEMA_OWNER; GRANT SELECT ON CALL_TYPE_REAL_TIME TO &&PLATFORM_SCHEMA_OWNER; GRANT SELECT ON CONTROLLER_TIME TO</pre>

	<pre> &&PLATFORM_SCHEMA_OWNER; GRANT SELECT ON INTERACTION_QUEUE TO &&PLATFORM_SCHEMA_OWNER; GRANT SELECT ON INTERACTION_QUEUE_REAL_TIME TO &&PLATFORM_SCHEMA_OWNER; GRANT SELECT ON LOGICAL_INTERFACE_CONTROLLER TO &&PLATFORM_SCHEMA_OWNER; GRANT SELECT ON PERIPHERAL TO &&PLATFORM_SCHEMA_OWNER; GRANT SELECT ON PERIPHERAL_REAL_TIME TO &&PLATFORM_SCHEMA_OWNER; GRANT SELECT ON QUEUE_SET1_REAL_TIME TO &&PLATFORM_SCHEMA_OWNER; GRANT SELECT ON QUEUE_SET2_REAL_TIME TO &&PLATFORM_SCHEMA_OWNER; GRANT SELECT ON SERVICE TO &&PLATFORM_SCHEMA_OWNER; &&PLATFORM_SCHEMA_OWNER; GRANT SELECT ON SERVICE_REAL_TIME TO &&PLATFORM_SCHEMA_OWNER; GRANT SELECT ON SKILL_GROUP TO &&PLATFORM_SCHEMA_OWNER; GRANT SELECT ON SKILL_GROUP_REAL_TIME TO &&PLATFORM_SCHEMA_OWNER; </pre> <p>Proceed to the Platform schema migration.</p>
<p>Platform schema migration specifics</p>	<p>In Oracle installations, before the Platform migration script is applied, ask your DBA to verify that the Platform schema owner is granted the following privileges:</p> <pre> CREATE SESSION,CREATE TABLE,CREATE OPERATOR,CREATE TYPE,CREATE TRIGGER,CREATE INDEXTYPE,CREATE PROCEDURE,CREATE SEQUENCE,CREATE VIEW,CREATE MATERIALIZED VIEW, CREATE JOB, EXECUTE ON SYS.GENADVISORSJOBCLASS. </pre>

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<p>Originating version</p>	<p>8.5.101.21</p>
<p>Target version</p>	<p>8.5.102.00</p>
<p>Script to migrate to the target version from the original version</p>	<p>advisors-platform-migrateSchema_8.5.101.09_8.5.102.00.sql</p>
<p>AGA schema dependencies</p>	<p>Before you apply the Platform migration script, migrate the AGA metrics schema to the target version by connecting as the AGA metrics schema owner and running any gc_metrics_<targetversion>_Objectsxxx.sql script for Oracle or gc_metrics_db_<target version>.sql script for MSSQL Server installations. There is no need to drop any AGA metrics objects before applying the script. Once the corresponding script is applied, in Oracle installations grant select privileges to the Platform schema owner as follows:</p> <pre> GRANT SELECT ON AGENT_SKILL_GROUP_REAL_TIME TO &&PLATFORM_SCHEMA_OWNER; GRANT SELECT ON CALL_TYPE TO &&PLATFORM_SCHEMA_OWNER; GRANT SELECT ON CALL_TYPE_REAL_TIME TO </pre>

	<pre> &&PLATFORM_SCHEMA_OWNER; GRANT SELECT ON CONTROLLER_TIME TO &&PLATFORM_SCHEMA_OWNER; GRANT SELECT ON INTERACTION_QUEUE TO &&PLATFORM_SCHEMA_OWNER; GRANT SELECT ON INTERACTION_QUEUE_REAL_TIME TO &&PLATFORM_SCHEMA_OWNER; GRANT SELECT ON LOGICAL_INTERFACE_CONTROLLER TO &&PLATFORM_SCHEMA_OWNER; GRANT SELECT ON PERIPHERAL TO &&PLATFORM_SCHEMA_OWNER; GRANT SELECT ON PERIPHERAL_REAL_TIME TO &&PLATFORM_SCHEMA_OWNER; GRANT SELECT ON QUEUE_SET1_REAL_TIME TO &&PLATFORM_SCHEMA_OWNER; GRANT SELECT ON QUEUE_SET2_REAL_TIME TO &&PLATFORM_SCHEMA_OWNER; GRANT SELECT ON SERVICE TO &&PLATFORM_SCHEMA_OWNER; GRANT SELECT ON SERVICE_MEMBER TO &&PLATFORM_SCHEMA_OWNER; GRANT SELECT ON SERVICE_REAL_TIME TO &&PLATFORM_SCHEMA_OWNER; GRANT SELECT ON SKILL_GROUP TO &&PLATFORM_SCHEMA_OWNER; GRANT SELECT ON SKILL_GROUP_REAL_TIME TO &&PLATFORM_SCHEMA_OWNER; </pre> <p>Proceed to the Platform schema migration.</p>
<p>Platform schema migration specifics</p>	<p>In Oracle installations, before the Platform migration script is applied, ask your DBA to verify that the Platform schema owner is granted the following privileges:</p> <pre> CREATE SESSION,CREATE TABLE,CREATE OPERATOR,CREATE TYPE,CREATE TRIGGER,CREATE INDEXTYPE,CREATE PROCEDURE,CREATE SEQUENCE,CREATE VIEW,CREATE MATERIALIZED VIEW, CREATE JOB, EXECUTE ON SYS.GENADVISORSJOBCLASS. </pre>

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<p>Originating version</p>	<p>8.5.101.21 or 8.5.102.00</p>
<p>Target version</p>	<p>8.5.201.26</p> <div data-bbox="824 1444 1380 1612" style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <p>Tip</p> <p>Advisors release 8.5.201.26 is included in the migration path for those who might have installed this version (it was a restricted-access release). If you did not install release 8.5.201.26 in your environment, then you can omit this migration step.</p> </div>
<p>Script to migrate to the target version from the original version</p>	<p>advisors-platform-migrateSchema_8.5.101(102)_8.5.201.26.sql</p>
<p>AGA schema dependencies</p>	<p>Before you apply the Platform migration script, migrate the AGA metrics schema to the target version by connecting as the AGA metrics schema owner and running any gc_metrics_<targetversion>_objectsxxx.sql script for</p>

	<p>Oracle or gc_metrics_db_<target version>.sql script for MSSQL Server installations. There is no need to drop any AGA metrics objects before applying the script. Once the corresponding script is applied, in Oracle installations grant select privileges to the Platform schema owner as follows:</p> <pre>GRANT SELECT ON AGENT_SKILL_GROUP_REAL_TIME TO &&PLATFORM_SCHEMA_OWNER; GRANT SELECT ON CALL_TYPE TO &&PLATFORM_SCHEMA_OWNER; GRANT SELECT ON CALL_TYPE_REAL_TIME TO &&PLATFORM_SCHEMA_OWNER; GRANT SELECT ON CONTROLLER_TIME TO &&PLATFORM_SCHEMA_OWNER; GRANT SELECT ON INTERACTION_QUEUE TO &&PLATFORM_SCHEMA_OWNER; GRANT SELECT ON INTERACTION_QUEUE_REAL_TIME TO &&PLATFORM_SCHEMA_OWNER; GRANT SELECT ON LOGICAL_INTERFACE_CONTROLLER TO &&PLATFORM_SCHEMA_OWNER; GRANT SELECT ON PERIPHERAL TO &&PLATFORM_SCHEMA_OWNER; GRANT SELECT ON PERIPHERAL_REAL_TIME TO &&PLATFORM_SCHEMA_OWNER; GRANT SELECT ON QUEUE_SET1_REAL_TIME TO &&PLATFORM_SCHEMA_OWNER; GRANT SELECT ON QUEUE_SET2_REAL_TIME TO &&PLATFORM_SCHEMA_OWNER; GRANT SELECT ON SERVICE TO &&PLATFORM_SCHEMA_OWNER; GRANT SELECT ON SERVICE_MEMBER TO &&PLATFORM_SCHEMA_OWNER; GRANT SELECT ON SERVICE_REAL_TIME TO &&PLATFORM_SCHEMA_OWNER; GRANT SELECT ON SKILL_GROUP TO &&PLATFORM_SCHEMA_OWNER; GRANT SELECT ON SKILL_GROUP_REAL_TIME TO &&PLATFORM_SCHEMA_OWNER;</pre> <p>Proceed to the Platform schema migration.</p>
<p>Platform schema migration specifics</p>	<p>In Oracle installations, before the migration script is applied, ask your DBA to verify that the Platform schema owner is granted the following privileges:</p> <pre>CREATE SESSION,CREATE TABLE,CREATE OPERATOR,CREATE TYPE,CREATE TRIGGER,CREATE INDEXTYPE,CREATE PROCEDURE,CREATE SEQUENCE,CREATE VIEW,CREATE MATERIALIZED VIEW, CREATE JOB, EXECUTE ON SYS.GENADVISORSJOBCLASS.</pre>

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<p>Originating version</p>	<p>8.5.101.21, 8.5.102.00, or 8.5.201.26</p>
<p>Target version</p>	<p>8.5.202.09</p>
<p>Script to migrate to the target version from the original version</p>	<p>advisors-platform-migrateSchema_8.5.101(102)_8.5.202.09.sql</p>
<p>AGA schema dependencies</p>	<p>Before you apply the Platform migration script, migrate the AGA metrics schema to the target version by connecting as the AGA</p>

	<p>metrics schema owner and running any gc_metrics_<targetversion>_Objectsxxx.sql script for Oracle or gc_metrics_db_<target version>.sql script for MSSQL Server installations. There is no need to drop any AGA metrics objects before applying the script. Once the corresponding script is applied, in Oracle installations grant select privileges to the Platform schema owner as follows:</p> <pre> GRANT SELECT ON AGENT_SKILL_GROUP_REAL_TIME TO &&PLATFORM_SCHEMA_OWNER WITH GRANT OPTION; GRANT SELECT ON CALL_TYPE TO &&PLATFORM_SCHEMA_OWNER WITH GRANT OPTION; GRANT SELECT ON CALL_TYPE_REAL_TIME TO &&PLATFORM_SCHEMA_OWNER WITH GRANT OPTION; GRANT SELECT ON CONTROLLER_TIME TO &&PLATFORM_SCHEMA_OWNER WITH GRANT OPTION; GRANT SELECT ON INTERACTION_QUEUE TO &&PLATFORM_SCHEMA_OWNER WITH GRANT OPTION; GRANT SELECT ON INTERACTION_QUEUE_REAL_TIME TO &&PLATFORM_SCHEMA_OWNER WITH GRANT OPTION; GRANT SELECT ON LOGICAL_INTERFACE_CONTROLLER TO &&PLATFORM_SCHEMA_OWNER WITH GRANT OPTION; GRANT SELECT ON PERIPHERAL TO &&PLATFORM_SCHEMA_OWNER WITH GRANT OPTION; GRANT SELECT ON PERIPHERAL_REAL_TIME TO &&PLATFORM_SCHEMA_OWNER WITH GRANT OPTION; GRANT SELECT ON QUEUE_SET1_REAL_TIME TO &&PLATFORM_SCHEMA_OWNER WITH GRANT OPTION; GRANT SELECT ON QUEUE_SET2_REAL_TIME TO &&PLATFORM_SCHEMA_OWNER WITH GRANT OPTION; GRANT SELECT ON SERVICE TO &&PLATFORM_SCHEMA_OWNER WITH GRANT OPTION; GRANT SELECT ON SERVICE_MEMBER TO &&PLATFORM_SCHEMA_OWNER WITH GRANT OPTION; GRANT SELECT ON SERVICE_REAL_TIME TO &&PLATFORM_SCHEMA_OWNER WITH GRANT OPTION; GRANT SELECT ON SKILL_GROUP TO &&PLATFORM_SCHEMA_OWNER WITH GRANT OPTION; GRANT SELECT ON SKILL_GROUP_REAL_TIME TO &&PLATFORM_SCHEMA_OWNER WITH GRANT OPTION; </pre>
<p>Platform schema migration specifics</p>	<ol style="list-style-type: none"> 1. In Oracle installations, before the migration script is applied, ask your DBA to verify that the Platform schema owner is granted the following privileges: <pre> CREATE SESSION,CREATE TABLE,CREATE OPERATOR,CREATE TYPE,CREATE TRIGGER,CREATE INDEXTYPE,CREATE PROCEDURE,CREATE SEQUENCE,CREATE VIEW,CREATE MATERIALIZED VIEW, CREATE JOB, EXECUTE ON SYS.GENADVISORSJOBCLASS. </pre> 2. Before you run the script, ask your DBA to determine if your Oracle server has JServer Java Virtual Machine installed. If not, ask your DBA to grant the EXECUTE ON SYS.DBMS_LOCK privilege to the Platform schema owner. In this case, use the migration script located under oracleNoJServer folder. 3. If you do not plan to set up Oracle enhanced security that allows the application to connect

	<p>to the database as an application user with minimum privileges, you will need to edit the migration script before it is applied by replacing all entries of DEFINER with CURRENT_USER, or you can request the edited script through Genesys support.</p> <ol style="list-style-type: none"> Note that switching from NoJServer version back to Jserver will require removing the spWaitSec procedure from the Platform procedure list and then running the migration script contained in the root folder. Switching from the JServer version back to NoJserver will require removing the spWaitMSec procedure from the Platform procedure list and then running the migration script contained in the root folder. If you plan to set up Oracle enhanced security for Advisors, ask your DBA to review and apply the <code>advisors-platform-<targetversion>_UsersAndRoles.sql</code> script after the Platform migration script is applied by its schema owner. For more information, see enhanced security setup.
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Originating version	8.5.202.09
Target version	8.5.202.10
Script to migrate to the target version from the original version	None
AGA schema dependencies	<p>Before you apply the Platform migration script, migrate the AGA metrics schema to the target version by connecting as the AGA metrics schema owner and running any <code>gc_metrics_<targetversion>_objectsxxx.sql</code> script for Oracle or <code>gc_metrics_db_<target version>.sql</code> script for MSSQL Server installations. There is no need to drop any AGA metrics objects before applying the script. Once the corresponding script is applied, in Oracle installations grant select privileges to the Platform schema owner as follows:</p> <pre>GRANT SELECT ON AGENT_SKILL_GROUP_REAL_TIME TO &&PLATFORM_SCHEMA_OWNER WITH GRANT OPTION; GRANT SELECT ON CALL_TYPE TO &&PLATFORM_SCHEMA_OWNER WITH GRANT OPTION; GRANT SELECT ON CALL_TYPE_REAL_TIME TO &&PLATFORM_SCHEMA_OWNER WITH GRANT OPTION; GRANT SELECT ON CONTROLLER_TIME TO &&PLATFORM_SCHEMA_OWNER WITH GRANT OPTION; GRANT SELECT ON INTERACTION_QUEUE TO &&PLATFORM_SCHEMA_OWNER WITH GRANT OPTION; GRANT SELECT ON INTERACTION_QUEUE_REAL_TIME TO &&PLATFORM_SCHEMA_OWNER WITH GRANT OPTION; GRANT SELECT ON LOGICAL_INTERFACE_CONTROLLER TO</pre>

	<pre> &&PLATFORM_SCHEMA_OWNER WITH GRANT OPTION; GRANT SELECT ON PERIPHERAL TO &&PLATFORM_SCHEMA_OWNER WITH GRANT OPTION; GRANT SELECT ON PERIPHERAL_REAL_TIME TO &&PLATFORM_SCHEMA_OWNER WITH GRANT OPTION; GRANT SELECT ON QUEUE_SET1_REAL_TIME TO &&PLATFORM_SCHEMA_OWNER WITH GRANT OPTION; GRANT SELECT ON QUEUE_SET2_REAL_TIME TO &&PLATFORM_SCHEMA_OWNER WITH GRANT OPTION; GRANT SELECT ON SERVICE TO &&PLATFORM_SCHEMA_OWNER WITH GRANT OPTION; GRANT SELECT ON SERVICE_MEMBER TO &&PLATFORM_SCHEMA_OWNER WITH GRANT OPTION; GRANT SELECT ON SERVICE_REAL_TIME TO &&PLATFORM_SCHEMA_OWNER WITH GRANT OPTION; GRANT SELECT ON SKILL_GROUP TO &&PLATFORM_SCHEMA_OWNER WITH GRANT OPTION; GRANT SELECT ON SKILL_GROUP_REAL_TIME TO &&PLATFORM_SCHEMA_OWNER WITH GRANT OPTION; </pre> <p>If you decide to apply the Platform migration script, make sure that the step with AGA metrics migration is implemented first.</p>
<p>Platform schema migration specifics</p>	<p>If you have already migrated the Platform schema to release 8.5.202.09, no migration scripts need to be applied to the Platform schema during migration to release 8.5.202.10. If you imported the database or want to change something – for example, you want to switch from Jserver to NoJserver version or vice versa – repeat the instructions shown in the table for the 8.5.202.09 target version and use the 8.5.202.09 scripts. Do not use the database scripts that were supplied with the Platform distribution for Hot Fix release 8.5.202.10.</p>

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<p>Originating version</p>	<p>8.5.202.10 or 8.5.202.09</p>
<p>Target version</p>	<p>9.0.000.06</p>
<p>Script to migrate to the target version from the original version</p>	<p>advisors-platform-migrateSchema_8.5.202.09_9.0.000.06.sql</p>
<p>AGA schema dependencies</p>	<p>Before you apply the Platform migration script, migrate the AGA metrics schema to the target version by connecting as the AGA metrics schema owner and running any gc_metrics_<targetversion>_Objectsxxx.sql script for Oracle or gc_metrics_db_<target version>.sql script for MSSQL Server installations. There is no need to drop any AGA metrics objects before applying the script. Once the corresponding script is applied, in Oracle installations grant select privileges to the Platform schema owner as follows:</p> <pre> GRANT SELECT ON AGENT_SKILL_GROUP_REAL_TIME TO &&PLATFORM_SCHEMA_OWNER WITH GRANT OPTION; GRANT SELECT ON CALL_TYPE_REAL_TIME TO &&PLATFORM_SCHEMA_OWNER WITH GRANT OPTION; GRANT SELECT ON CONTROLLER_TIME TO &&PLATFORM_SCHEMA_OWNER WITH GRANT OPTION; </pre>

	<pre>GRANT SELECT ON INTERACTION_QUEUE_REAL_TIME TO &&PLATFORM_SCHEMA_OWNER WITH GRANT OPTION; GRANT SELECT ON PERIPHERAL_REAL_TIME TO &&PLATFORM_SCHEMA_OWNER WITH GRANT OPTION; GRANT SELECT ON QUEUE_SET1_REAL_TIME TO &&PLATFORM_SCHEMA_OWNER WITH GRANT OPTION; GRANT SELECT ON QUEUE_SET2_REAL_TIME TO &&PLATFORM_SCHEMA_OWNER WITH GRANT OPTION; GRANT SELECT ON SERVICE_MEMBER TO &&PLATFORM_SCHEMA_OWNER WITH GRANT OPTION; GRANT SELECT ON SERVICE_REAL_TIME TO &&PLATFORM_SCHEMA_OWNER WITH GRANT OPTION; GRANT SELECT ON SKILL_GROUP_REAL_TIME TO &&PLATFORM_SCHEMA_OWNER WITH GRANT OPTION;</pre>
<p>Platform schema migration specifics</p>	<ol style="list-style-type: none"> 1. In Oracle installations, before the migration script is applied, ask your DBA to verify that the Platform schema owner is granted the following privileges: CREATE SESSION,CREATE TABLE,CREATE OPERATOR,CREATE TYPE,CREATE TRIGGER,CREATE INDEXTYPE,CREATE PROCEDURE,CREATE SEQUENCE,CREATE VIEW,CREATE MATERIALIZED VIEW, CREATE JOB, EXECUTE ON SYS.GENADVISORSJOBCLASS. 2. Before you run the script, ask your DBA to determine if your Oracle server has JServer Java Virtual Machine installed. If not, ask your DBA to grant the EXECUTE ON SYS.DBMS_LOCK privilege to the Platform schema owner. In this case, use the migration script located under the oracleNoJServer folder. Before running the script, expand the procedures folder in your Platform schema and remove the spWaitMsec procedure if it is there. 3. If you do not plan to set up Oracle enhanced security that allows the application to connect to the database as an application user with minimum privileges, you will need to edit the chosen migration script before it is applied by replacing all entries of DEFINER with CURRENT_USER, or you can request the edited script through Genesys support. 4. Note that switching from the NoJServer version back to Jserver will require removing the spWaitSec procedure from the Platform procedure list and then running the migration script contained in the root folder. Switching from the JServer version back to NoJserver will require removing the spWaitMSec procedure from the Platform procedure list and then running the migration script contained in the root folder.

	<p>5. For Oracle installations, a bulk configuration/export tool for the independent configuration mode is available as a separate installation script. Contact Genesys Support to request this script.</p> <p>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 <code>advisors-platform-version_BulkConfigurationTool.sql</code> 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 <code>advisors-platform-version_BulkConfigurationTool.sql</code> script does not erase any data. It is safe to apply the <code>advisors-platform-version_BulkConfigurationTool.sql</code> and <code>blkCfgExp.sql</code> scripts while the application is up and running.</p> <p>6. If you plan to set up Oracle enhanced security for Advisors, ask your DBA to review and apply the <code>advisors-platform-<targetversion>_UsersAndRoles.sql</code> script after the Platform migration script is applied by its schema owner. For more information, see enhanced security setup.</p>
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Originating version	9.0.000.06 or 8.5.202.09
Target version	9.0.000.10
Script to migrate to the target version from the original version	<code>advisors-platform-migrateSchema_8.5.202.09_9.0.000.10.sql</code>
AGA schema dependencies	Before you apply the Platform migration script, migrate the AGA metrics schema to the target version by connecting as the AGA

	<p>metrics schema owner and running any gc_metrics_<targetversion>_Objectsxxx.sql script for Oracle or gc_metrics_db_<target version>.sql script for MSSQL Server installations. There is no need to drop any AGA metrics objects before applying the script. Once the corresponding script is applied, in Oracle installations grant select privileges to the Platform schema owner as follows:</p> <pre>GRANT SELECT ON AGENT_SKILL_GROUP_REAL_TIME TO &&PLATFORM_SCHEMA_OWNER WITH GRANT OPTION; GRANT SELECT ON CALL_TYPE_REAL_TIME TO &&PLATFORM_SCHEMA_OWNER WITH GRANT OPTION; GRANT SELECT ON CONTROLLER_TIME TO &&PLATFORM_SCHEMA_OWNER WITH GRANT OPTION; GRANT SELECT ON INTERACTION_QUEUE_REAL_TIME TO &&PLATFORM_SCHEMA_OWNER WITH GRANT OPTION; GRANT SELECT ON PERIPHERAL_REAL_TIME TO &&PLATFORM_SCHEMA_OWNER WITH GRANT OPTION; GRANT SELECT ON QUEUE_SET1_REAL_TIME TO &&PLATFORM_SCHEMA_OWNER WITH GRANT OPTION; GRANT SELECT ON QUEUE_SET2_REAL_TIME TO &&PLATFORM_SCHEMA_OWNER WITH GRANT OPTION; GRANT SELECT ON SERVICE_MEMBER TO &&PLATFORM_SCHEMA_OWNER WITH GRANT OPTION; GRANT SELECT ON SERVICE_REAL_TIME TO &&PLATFORM_SCHEMA_OWNER WITH GRANT OPTION; GRANT SELECT ON SKILL_GROUP_REAL_TIME TO &&PLATFORM_SCHEMA_OWNER WITH GRANT OPTION;</pre>
<p>Platform schema migration specifics</p>	<ol style="list-style-type: none"> 1. In Oracle installations, before the migration script is applied, ask your DBA to verify that the Platform schema owner is granted the following privileges: <pre>CREATE SESSION,CREATE TABLE,CREATE OPERATOR,CREATE TYPE,CREATE TRIGGER,CREATE INDEXTYPE,CREATE PROCEDURE,CREATE SEQUENCE,CREATE VIEW,CREATE MATERIALIZED VIEW, CREATE JOB, EXECUTE ON SYS.GENADVISORSJOBCLASS.</pre> 2. Before you run the script, ask your DBA to determine if your Oracle server has JServer Java Virtual Machine installed. If not, ask your DBA to grant the EXECUTE ON SYS.DBMS_LOCK privilege to the Platform schema owner. In this case, use the migration script located under the oracleNoJServer folder. 3. If you do not plan to set up Oracle enhanced security that allows the application to connect to the database as an application user with minimum privileges, you will need to edit the migration script before it is applied by replacing all entries of DEFINER with CURRENT_USER, or you can request the edited script through Genesys support. 4. Note that switching from the NoJServer version back to Jserver will require removing the spWaitSec procedure from the Platform

	<p>procedure list and then running the migration script contained in the root folder. Switching from the JServer version back to NoJserver will require removing the spWaitMSec procedure from the Platform procedure list and then running the migration script contained in the root folder.</p> <p>5. For Oracle installations, a bulk configuration/export tool for the independent configuration mode is available as a separate installation script. Contact Genesys Support to request this script.</p> <p>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 <code>advisors-platform-version_BulkConfigurationTool.sql</code> 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 <code>advisors-platform-version_BulkConfigurationTool.sql</code> script does not erase any data. It is safe to apply the <code>advisors-platform-version_BulkConfigurationTool.sql</code> and <code>blkCfgExp.sql</code> scripts while the application is up and running.</p> <p>6. If you plan to set up Oracle enhanced security for Advisors, ask your DBA to review and apply the <code>advisors-platform-<targetversion>_UsersAndRoles.sql</code> script after the Platform migration script is applied by its schema owner. For more information, see enhanced security setup.</p>
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Originating version	9.0.000.10
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<p>Target version</p>	<p>9.0.001.06</p>
<p>Script to migrate to the target version from the original version</p>	<p>advisors-platform-migrateSchema_9.000.10(7,6)_9.0.001.06.sql</p>
<p>AGA schema dependencies</p>	<p>If an AGA metrics schema upgrade was done in the previous release, you can skip it in the migration to 9.0.001.06. If you moved the schemas to another database or cloned them with different names, you will need to reinstate all privileges. In Oracle installations, reinstate select privileges to the Platform schema owner to AGA metrics views as follows:</p> <pre>GRANT SELECT ON AGENT_SKILL_GROUP_REAL_TIME TO &&PLATFORM_SCHEMA_OWNER WITH GRANT OPTION; GRANT SELECT ON CALL_TYPE_REAL_TIME TO &&PLATFORM_SCHEMA_OWNER WITH GRANT OPTION; GRANT SELECT ON CONTROLLER_TIME TO &&PLATFORM_SCHEMA_OWNER WITH GRANT OPTION; GRANT SELECT ON INTERACTION_QUEUE_REAL_TIME TO &&PLATFORM_SCHEMA_OWNER WITH GRANT OPTION; GRANT SELECT ON PERIPHERAL_REAL_TIME TO &&PLATFORM_SCHEMA_OWNER WITH GRANT OPTION; GRANT SELECT ON QUEUE_SET1_REAL_TIME TO &&PLATFORM_SCHEMA_OWNER WITH GRANT OPTION; GRANT SELECT ON QUEUE_SET2_REAL_TIME TO &&PLATFORM_SCHEMA_OWNER WITH GRANT OPTION; GRANT SELECT ON SERVICE_MEMBER TO &&PLATFORM_SCHEMA_OWNER WITH GRANT OPTION; GRANT SELECT ON SERVICE_REAL_TIME TO &&PLATFORM_SCHEMA_OWNER WITH GRANT OPTION; GRANT SELECT ON SKILL_GROUP_REAL_TIME TO &&PLATFORM_SCHEMA_OWNER WITH GRANT OPTION;</pre>
<p>Platform schema migration specifics</p>	<ol style="list-style-type: none"> 1. In Oracle installations, before the migration script is applied, ask your DBA to verify that the Platform schema owner is granted the following privileges: <pre>CREATE SESSION,CREATE TABLE,CREATE OPERATOR,CREATE TYPE,CREATE TRIGGER,CREATE INDEXTYPE,CREATE PROCEDURE,CREATE SEQUENCE,CREATE VIEW,CREATE MATERIALIZED VIEW, CREATE JOB, EXECUTE ON SYS.GENADVISORSJOBCLASS.</pre> 2. Before you run the script, ask your DBA to determine if your Oracle server has JServer Java Virtual Machine installed. If not, ask your DBA to grant the EXECUTE ON SYS.DBMS_LOCK privilege to the Platform schema owner. 3. If you do not plan to set up Oracle enhanced security that allows the application to connect to the database as an application user with minimum privileges, you will need to edit the migration script before it is applied by replacing all entries of DEFINER with CURRENT_USER, or you can request the edited script through Genesys support. 4. If you have the bulk configuration tool installed, apply the advisors-

	<p>platform-9.0.002.09_BulkConfigurationTool.sql script, which you can find in the ip\platform-database-sql\oracle\bulkconfig folder of the Platform release 9.0.002.09 installation package. If you do not have the release 9.0.002.09 installation package, request the script from Genesys Support team.</p> <ol style="list-style-type: none">5. If you plan to set up Oracle enhanced security for Advisors, ask your DBA to review and apply the advisors-platform-<targetversion>_UsersAndRoles.sql script after the Platform migration script is applied by its schema owner. For more information, see enhanced security setup.6. 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 Support 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. 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
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	<p>apply the <code>advisors-platform-version_BulkConfigurationTool.sql</code> and <code>blkCfgExp.sql</code> scripts while the application is up and running.</p> <div style="border: 1px solid orange; padding: 5px; margin: 10px 0;"> <p>Important</p> <p>The bulk configuration/export tool for independent mode is not available for installations with MS SQL Server starting with release 9.0.001.06.</p> </div> <p>7. In this release (release 9.0.001.06), you must run the <code>advisors-platform-<targetversion>_ValidateDatabaseInstall.sql</code> script as the schema owner after you install XML Generator and before you start it.</p>
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Originating version	9.0.001.06
Target version	9.0.002.03
Script to migrate to the target version from the original version	<code>advisors-platform-migrateSchema_9.001.06_9.0.002.03.sql</code>
AGA schema dependencies	<p>Before you apply the Platform migration script, migrate the AGA metrics schema to 9.0.002.03 by connecting as the AGA metrics schema owner and running any <code>gc_metrics_<targetversion>_Objectsxxx.sql</code> script. There is no need to drop any AGA metrics objects. Once this is done, grant select privileges to the Platform schema owner as follows:</p> <pre>GRANT SELECT ON AGENT_SKILL_GROUP_REAL_TIME TO &&PLATFORM_SCHEMA_OWNER WITH GRANT OPTION; GRANT SELECT ON CALL_TYPE_REAL_TIME TO &&PLATFORM_SCHEMA_OWNER WITH GRANT OPTION; GRANT SELECT ON CONTROLLER_TIME TO &&PLATFORM_SCHEMA_OWNER WITH GRANT OPTION; GRANT SELECT ON INTERACTION_QUEUE_REAL_TIME TO &&PLATFORM_SCHEMA_OWNER WITH GRANT OPTION; GRANT SELECT ON PERIPHERAL_REAL_TIME TO &&PLATFORM_SCHEMA_OWNER WITH GRANT OPTION; GRANT SELECT ON QUEUE_SET1_REAL_TIME TO &&PLATFORM_SCHEMA_OWNER WITH GRANT OPTION; GRANT SELECT ON QUEUE_SET2_REAL_TIME TO &&PLATFORM_SCHEMA_OWNER WITH GRANT OPTION; GRANT SELECT ON SERVICE_MEMBER TO &&PLATFORM_SCHEMA_OWNER WITH GRANT OPTION; GRANT SELECT ON SERVICE_REAL_TIME TO &&PLATFORM_SCHEMA_OWNER WITH GRANT OPTION; GRANT SELECT ON SKILL_GROUP_REAL_TIME TO &&PLATFORM_SCHEMA_OWNER WITH GRANT OPTION;</pre>

Platform schema migration specifics

1. In Oracle installations, before the migration script is applied, ask your DBA to verify that the Platform schema owner is granted the following privileges:

```
CREATE SESSION,CREATE TABLE,CREATE OPERATOR,CREATE TYPE,CREATE TRIGGER,CREATE INDEXTYPE,CREATE PROCEDURE,CREATE SEQUENCE,CREATE VIEW,CREATE MATERIALIZED VIEW,CREATE JOB, EXECUTE ON SYS.GENADVISORSJOBCLASS.
```
2. Before you run the script, ask your DBA to determine if your Oracle server has JServer Java Virtual Machine installed. If not, ask your DBA to grant the EXECUTE ON SYS.DBMS_LOCK privilege to the Platform schema owner. Otherwise, use a script located under the oracleJServer folder.
3. If you have the bulk configuration tool installed, apply the advisors-platform-9.0.002.09_BulkConfigurationTool.sql script, which you can find in the ip\platform-database-sql\oracle\bulkconfig folder of the Platform release 9.0.002.09 installation package. If you do not have the release 9.0.002.09 installation package, request the script from Genesys Support team.
4. If you do not plan to set up Oracle enhanced security that allows the application to connect to the database as an application user with minimum privileges, you will need to use the script located under the current_user subfolder. Otherwise, use the script located under the definer subfolder. In this case, ask your DBA to review and apply the advisors-platform-<targetversion>_UsersAndRoles.sql script after the Platform migration script is applied by its schema owner. For more information, see [enhanced security setup](#).
5. 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 Support representative. There is only one blkCfgExp.sql script for any mode. The script detects the configuration mode automatically and populates the corresponding tables. All

	<p>bulk configuration tables are present in the schema, but only the ones that correspond to the selected configuration mode are considered.</p> <p>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 <code>advisors-platform-version_BulkConfigurationTool.sql</code> 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 <code>advisors-platform-version_BulkConfigurationTool.sql</code> script does not erase any data. It is safe to apply the <code>advisors-platform-version_BulkConfigurationTool.sql</code> and <code>blkCfgExp.sql</code> scripts while the application is up and running.</p> <div data-bbox="928 1171 1455 1388" style="border: 1px solid #ccc; padding: 10px; margin: 10px 0;"> <p>Important</p> <p>The bulk configuration/export tool for independent mode is not available for installations with MS SQL Server starting with release 9.0.001.06.</p> </div> <p>6. In this release (release 9.0.002.03), you will need to run the <code>advisors-platform-<targetversion>_ValidateDatabaseInstall.sql</code> script as the schema owner after you install XML Generator and before you start it.</p>
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Originating version	9.0.002.03
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<p>Target version</p>	<p>9.0.002.09</p>
<p>Script to migrate to the target version from the original version</p>	<p>advisors-platform-migrateSchema_9.002.03-9.0.002.09.sql</p>
<p>AGA schema dependencies</p>	<p>Before you apply the Platform migration script, migrate the AGA metrics schema to 9.0.002.09 by connecting as the AGA metrics schema owner and running any gc_metrics_<target version>_objectsxxx.sql script. There is no need to drop any AGA metrics objects. Once this is done, grant select privileges to the Platform schema owner as follows:</p> <pre>GRANT SELECT ON AGENT_SKILL_GROUP_REAL_TIME TO &&PLATFORM_SCHEMA_OWNER WITH GRANT OPTION; GRANT SELECT ON CALL_TYPE_REAL_TIME TO &&PLATFORM_SCHEMA_OWNER WITH GRANT OPTION; GRANT SELECT ON CONTROLLER_TIME TO &&PLATFORM_SCHEMA_OWNER WITH GRANT OPTION; GRANT SELECT ON INTERACTION_QUEUE_REAL_TIME TO &&PLATFORM_SCHEMA_OWNER WITH GRANT OPTION; GRANT SELECT ON PERIPHERAL_REAL_TIME TO &&PLATFORM_SCHEMA_OWNER WITH GRANT OPTION; GRANT SELECT ON QUEUE_SET1_REAL_TIME TO &&PLATFORM_SCHEMA_OWNER WITH GRANT OPTION; GRANT SELECT ON QUEUE_SET2_REAL_TIME TO &&PLATFORM_SCHEMA_OWNER WITH GRANT OPTION; GRANT SELECT ON SERVICE_MEMBER TO &&PLATFORM_SCHEMA_OWNER WITH GRANT OPTION; GRANT SELECT ON SERVICE_REAL_TIME TO &&PLATFORM_SCHEMA_OWNER WITH GRANT OPTION; GRANT SELECT ON SKILL_GROUP_REAL_TIME TO &&PLATFORM_SCHEMA_OWNER WITH GRANT OPTION;</pre>
<p>Platform schema migration specifics</p>	<ol style="list-style-type: none"> 1. In Oracle installations, before the migration script is applied, ask your DBA to verify that the Platform schema owner is granted the following privileges: <pre>CREATE SESSION,CREATE TABLE,CREATE OPERATOR,CREATE TYPE,CREATE TRIGGER,CREATE INDEXTYPE,CREATE PROCEDURE,CREATE SEQUENCE,CREATE VIEW,CREATE MATERIALIZED VIEW, CREATE JOB, EXECUTE ON SYS.GENADVISORSJOBCLASS.</pre> 2. Before you run the script, ask your DBA to determine if your Oracle server has JServer Java Virtual Machine installed. If not, ask your DBA to grant the EXECUTE ON SYS.DBMS_LOCK privilege to the Platform schema owner. Otherwise, use a script located under the oracleJServer folder. 3. If you do not plan to set up Oracle enhanced security that allows the application to connect to the database as an application user with minimum privileges, you will need to use the script located under the current_user subfolder. Otherwise, use the script located under the definer subfolder. In this case, ask your DBA to review and apply the advisors-

	<p>platform- <targetversion>_UsersAndRoles.sql script after the Platform migration script is applied by its schema owner. For more information, see enhanced security setup.</p> <p>4. For Oracle installations, a bulk configuration/export tool for the independent configuration mode is available starting with Advisors release 9.0.002.09. The tool is included with the deployment/migration scripts. 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.</p> <div data-bbox="927 890 1458 1104" style="border: 1px solid #ccc; padding: 10px; background-color: #fff9c4;"> <p>Important</p> <p>The bulk configuration/export tool for independent mode is not available for installations with MS SQL Server starting with release 9.0.001.06.</p> </div> <p>5. In this release, you will need to run the advisors-platform-<targetversion>_ValidateDatabaseInstall.sql script as the schema owner after you install XML Generator and before you start it.</p>
<p>Metric Graphing schema migration specifics</p>	<p>Contact Customer Care to request the metric-graphing-database_9.0.002.09_patch1.sql script. Apply the script to the metric graphing schema after you have applied the metric graphing migration script. See the Known Issues in the Contact Center Advisor and Workforce Advisor Release Note.</p>

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<p>Originating version</p>	<p>9.0.002.09</p>
<p>Target version</p>	<p>9.0.003.04</p>

<p>Scripts to migrate to the target version from the original version</p>	<ol style="list-style-type: none"> advisors-platform-migrateSchema_9.002.09_9.0.003.04.sql advisors-platform-9.0.003.04_BulkConfigurationTool.sql (Oracle only) advisors-platform-9.0.003.04_patch1.sql (Oracle only)
<p>AGA schema dependencies</p>	<p>Before you apply the Platform migration script, migrate the AGA metrics schema to 9.0.003.04 by connecting as the AGA metrics schema owner and running any gc_metrics_<target version>_Objectsxxx.sql script. There is no need to drop any AGA metrics objects. Once this is done, grant select privileges to the Platform schema owner as follows:</p> <pre>GRANT SELECT ON AGENT_SKILL_GROUP_REAL_TIME TO &&PLATFORM_SCHEMA_OWNER WITH GRANT OPTION; GRANT SELECT ON CALL_TYPE_REAL_TIME TO &&PLATFORM_SCHEMA_OWNER WITH GRANT OPTION; GRANT SELECT ON CONTROLLER_TIME TO &&PLATFORM_SCHEMA_OWNER WITH GRANT OPTION; GRANT SELECT ON INTERACTION_QUEUE_REAL_TIME TO &&PLATFORM_SCHEMA_OWNER WITH GRANT OPTION; GRANT SELECT ON PERIPHERAL_REAL_TIME TO &&PLATFORM_SCHEMA_OWNER WITH GRANT OPTION; GRANT SELECT ON QUEUE_SET1_REAL_TIME TO &&PLATFORM_SCHEMA_OWNER WITH GRANT OPTION; GRANT SELECT ON QUEUE_SET2_REAL_TIME TO &&PLATFORM_SCHEMA_OWNER WITH GRANT OPTION; GRANT SELECT ON SERVICE_MEMBER TO &&PLATFORM_SCHEMA_OWNER WITH GRANT OPTION; GRANT SELECT ON SERVICE_REAL_TIME TO &&PLATFORM_SCHEMA_OWNER WITH GRANT OPTION; GRANT SELECT ON SKILL_GROUP_REAL_TIME TO &&PLATFORM_SCHEMA_OWNER WITH GRANT OPTION;</pre>
<p>Platform schema migration specifics</p>	<ol style="list-style-type: none"> In Oracle installations, before the migration script is applied, ask your DBA to verify that the Platform schema owner is granted the following privileges: <pre>CREATE SESSION,CREATE TABLE,CREATE OPERATOR,CREATE TYPE,CREATE TRIGGER,CREATE INDEXTYPE,CREATE PROCEDURE,CREATE SEQUENCE,CREATE VIEW,CREATE MATERIALIZED VIEW, CREATE JOB, EXECUTE ON SYS.GENADVISORSJOBCLASS.</pre> Before you run the script, ask your DBA to determine if your Oracle server has JServer Java Virtual Machine installed. If not, ask your DBA to grant the EXECUTE ON SYS.DBMS_LOCK privilege to the Platform schema owner. In this case, use the migration script located under the oracleNoJServer folder. Otherwise, use a script located under the oracleJServer folder. If you do not plan to set up Oracle enhanced

	<p>security that allows the application to connect to the database as an application user with minimum privileges, you will need to use the migration script and the patch script located under the <code>current_user</code> subfolder. Otherwise, use the scripts located under the <code>definer</code> subfolder. In this case, ask your DBA to review and apply the <code>advisors-platform-<targetversion>_UsersAndRoles.sql</code> script after the Platform migration script and the patch script are applied by its schema owner. For more information, see enhanced security setup.</p> <ol style="list-style-type: none"> 4. Apply <code>advisors-platform-migrateSchema_9.002.09_9.0.003.04.sql</code>. 5. In Oracle installations, apply the <code>advisors-platform-9.0.003.04_BulkConfigurationTool.sql</code> script to upgrade the bulk configuration tool. 6. In Oracle installations, apply <code>advisors-platform-9.0.003.04_patch1.sql</code>. 7. In Oracle installations, and only if you use the Oracle enhanced security setup, apply the <code>advisors-platform-<targetversion>_UsersAndRoles.sql</code> script. In MSSQL installations, and only if you use MSSQL enhanced security setup, execute <code>spGrantExecute</code> in each database. 8. In this release, you must run the <code>advisors-platform-<targetversion>_ValidateDatabaseInstall.sql</code> script as the Oracle Platform schema owner after you install XML Generator and before you start it.
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Originating version	9.0.003.04
Target version	9.0.003.09
Script to migrate to the target version from the original version	<ol style="list-style-type: none"> 1. <code>advisors-platform-migrateSchema_9.003.04_9.0.003.09.sql</code> 2. <code>advisors-platform-9.0.003.09_BulkConfigurationTool.sql</code> (Oracle only)

<p>AGA schema dependencies</p>	<p>Before you apply the Platform migration script, migrate the AGA metrics schema to 9.0.003.09 by connecting as the AGA metrics schema owner and running any gc_metrics_<target version>_Objectsxxx.sql script. There is no need to drop any AGA metrics objects. Once this is done, grant select privileges to the Platform schema owner as follows:</p> <pre>GRANT SELECT ON AGENT_SKILL_GROUP_REAL_TIME TO &&PLATFORM_SCHEMA_OWNER WITH GRANT OPTION; GRANT SELECT ON CALL_TYPE_REAL_TIME TO &&PLATFORM_SCHEMA_OWNER WITH GRANT OPTION; GRANT SELECT ON CONTROLLER_TIME TO &&PLATFORM_SCHEMA_OWNER WITH GRANT OPTION; GRANT SELECT ON INTERACTION_QUEUE_REAL_TIME TO &&PLATFORM_SCHEMA_OWNER WITH GRANT OPTION; GRANT SELECT ON PERIPHERAL_REAL_TIME TO &&PLATFORM_SCHEMA_OWNER WITH GRANT OPTION; GRANT SELECT ON QUEUE_SET1_REAL_TIME TO &&PLATFORM_SCHEMA_OWNER WITH GRANT OPTION; GRANT SELECT ON QUEUE_SET2_REAL_TIME TO &&PLATFORM_SCHEMA_OWNER WITH GRANT OPTION; GRANT SELECT ON SERVICE_MEMBER TO &&PLATFORM_SCHEMA_OWNER WITH GRANT OPTION; GRANT SELECT ON SERVICE_REAL_TIME TO &&PLATFORM_SCHEMA_OWNER WITH GRANT OPTION; GRANT SELECT ON SKILL_GROUP_REAL_TIME TO &&PLATFORM_SCHEMA_OWNER WITH GRANT OPTION;</pre>
<p>Platform schema migration specifics</p>	<ol style="list-style-type: none"> 1. In Oracle installations, before the migration script is applied, ask your DBA to verify that the Platform schema owner is granted the following privileges: <pre>CREATE SESSION,CREATE TABLE,CREATE OPERATOR,CREATE TYPE,CREATE TRIGGER,CREATE INDEXTYPE,CREATE PROCEDURE,CREATE SEQUENCE,CREATE VIEW,CREATE MATERIALIZED VIEW, CREATE JOB, EXECUTE ON SYS.GENADVISORSJOBCLASS.</pre> 2. Before you run the script, ask your DBA to determine if your Oracle server has JServer Java Virtual Machine installed. If not, ask your DBA to grant the EXECUTE ON SYS.DBMS_LOCK privilege to the Platform schema owner. In this case, use the migration script located under the oracleNoJServer folder. Otherwise, use a script located under the oracleJServer folder. 3. If you do not plan to set up Oracle enhanced security that allows the application to connect to the database as an application user with minimum privileges, you will need to use the migration script and the patch script located under the current_user subfolder. Otherwise, use the scripts located under the definer subfolder. In this case, ask your DBA to review and apply the advisors-platform-<targetversion>_UsersAndRoles.sql script after the Platform migration script and the

	<p>patch script are applied by its schema owner. For more information, see enhanced security setup.</p> <ol style="list-style-type: none">4. Apply <code>advisors-platform-migrateSchema_9.003.04_9.0.003.09.sql</code>.5. In Oracle installations, apply the <code>advisors-platform-9.0.003.09_BulkConfigurationTool.sql</code> script to upgrade the bulk configuration tool.6. In Oracle installations, and only if you use the Oracle enhanced security setup, apply the <code>advisors-platform-<targetversion>_UsersAndRoles.sql</code> script. In MSSQL installations, and only if you use MSSQL enhanced security setup, execute <code>spGrantExecute</code> in each database.7. In this release, you must run the <code>advisors-platform-<targetversion>_ValidateDatabaseInstall.sql</code> script as the Oracle Platform schema owner after you install XML Generator and before you start it.
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Pulse Advisors Migration Procedure – 8.1 Releases

Procedure:

Prerequisites

- Ensure that you have a backup of your current Advisors components and all associated configuration before migration. In particular, you must back up the Platform database. Genesys strongly recommends that you also back up the Metric Graphing database and the Advisors Genesys Adapter metrics database. Before proceeding with the migration procedure, ensure that your backup databases can be restored.

Steps

1. Ensure that all the external prerequisites are in place (see [Supporting Software Components](#)).
2. Upgrade your database software, if required.
3. Uninstall the previous version of each application from the server.

Important

The previous installation must be completely removed by deleting or renaming its installation directory.

Genesys recommends that you uninstall the Windows services for the Advisors CCAAdv XML Generator and Advisors Suite Server (that is, the Platform Server) before you rename or delete the installation directory. Uninstalling the Windows services requires files that are in the installation directories you are going to delete or rename.

If the migration fails and you must roll back to the previous version, changing the directory name to the original name suffices.

4. Migrate the databases.

It is very important to migrate the databases in the order listed here.

Important

- To migrate users held in the 3.3, 8.0, or 8.1.0 Advisors database to the Genesys Configuration Server, run the User Migration Utility before migrating the Platform database. If you run the User Migration Utility to move users to the

Configuration Server as part of a general migration to Release 8.1.2, it is not necessary to run it again as part of a migration from Release 8.1.2 to Release 8.1.3. If you have new users, simply add them to Configuration Server either before or after the successful migration to Release 8.1.3.

- To migrate configuration objects held in Advisors databases in releases prior to 8.1.2 to the Genesys Configuration Server, run the Advisors Object Migration Wizard. Genesys recommends that you run the Object Migration Wizard to migrate metrics after executing the last FA migration database script.

- a. Migrate the AGA metrics databases (not required for migration to release 8.1.5). The AGA metrics database must be migrated before any other.

Starting in Release 8.1.5, source metric definitions and statistics templates that were previously stored in the AGA database move to Advisors Platform tables. Configured objects and filters that were previously stored in the AGA database move to Genesys Configuration Server.

If you are migrating from Advisors release 8.1.4 to release 8.1.5, you must use the release 8.1.5 metrics database creation script to recreate the AGA metrics schema (you do not run a migration script):

- i. Delete the AGA metrics database(s):

- MSSQL:
`DROP DATABASE <metrics_database_name>`
- ORACLE:
`DROP USER <metrics_database_user> CASCADE`

- ii. Recreate the AGA metrics database(s) using the 8.1.5 database schema script:

- MSSQL:
`gc_metrics_newdb_<version>.sql`
- Oracle:
`gc_metrics_new_<version>_Schema.sql`

- iii. If you use Oracle, you must grant access privileges to the Platform database user account (the Advisors User account) to access the new AGA metrics database(s).

- iv. If the new AGA metrics database has a name that is different from the previous database, ensure you change the name in the LINKED_SERVER column of the Advisors Platform ICM_DATABASE table.

- b. Migrate the Platform database.

If supplied in your installation package, the platform post-install script should not be executed immediately after you apply the migration script. If the migration script issues a recommendation to apply the post-installation script, apply it after you have installed all components. See [Step 9](#).

- c. Migrate the AGA configuration databases (not required for migration to release 8.1.5).

The AGA configuration database is not required in Release 8.1.5 because the data moves to Advisors Platform and Genesys Configuration Server. However, you must maintain the AGA configuration database from previous releases until you complete all migration work for Release 8.1.5. After a successful upgrade to Release 8.1.5, you can delete the AGA configuration database.

- d. If you deploy Advisors Frontline Advisor, migrate the Frontline Advisor database.

Important

Thresholds and rules that use overrides, and were configured prior to 8.1, cannot be migrated to 8.1.1. The FA database generates errors to the log file when using the 8.1 to 8.1.1 migration script to migrate the FA database. Immediately before you run the 8.1 to 8.1.1 migration script for the FA database (fa-database-migration-8.1-to-8.1.1.sql), execute the following queries to remove threshold and rule overrides and to allow creation of the indexes:

- DELETE FROM FA_Violations
- DELETE FROM FA_Thresholds WHERE IsGlobal = 0
- DELETE FROM FA_Rules WHERE IsGlobal = 0

- e. Migrate the Advisors Cisco Adapter database if you use FA with a Cisco source.
- f. Migrate the Metric Graphing database if you use CCAAdv/WA.

The script for the Metric Graphing database is included in the CCAAdv/WA installation package (IP). Unlike other Advisors components, there is no script for the Metric Graphing database that includes the word “migration” or “migrate” in the filename; you use the Metric Graphing script that is included in the IP for both new installations and for migration.

7. Install the Platform service (Geronimo).
8. Install the core service for the Adapter(s) you have installed.

If you are installing Release 8.1.5, migrate source metric definitions templates, statistics templates, and configured objects and filters from the AGA database to the Platform database and to Genesys Configuration Server using the Advisors Object Migration Wizard before you install the AGA core service.

To install an Adapter core service, run the installation .jar file for the release to which you are migrating and ensure the option to install the service is selected as part of the server installation. For detailed information, see the [Performance Management Advisors 8.1 Deployment Guide](#).

9. Optionally, install Contact Center Advisor, Workforce Advisor, CCAAdv XML Generator, Resource Management, and Frontline Advisor.

Important

- Resource Management is not available in a Cisco-only configuration.
- XML Generator is required only for Contact Center Advisor to function. XML Generator is not used in the WA application, although XML Generator must run at least one cycle immediately after you install it. This is necessary to generate a set of views used by CCAAdv and WA to access metrics data sources. XML Generator also loads metadata during this cycle: names of switches, applications, agent groups, and the relationships among them, which are subsequently used in CCAAdv and WA configuration.
- If you install a new version of Contact Center Advisor in an environment that

uses Contact Center Advisor–Mobile Edition, first uninstall Mobile Edition, install the new Contact Center Advisor software, and then re-install Mobile Edition software. Starting in Release 8.1.5, CCAdv–ME does not have a standalone installation file; it is an optional module included in the CCAdv installation file.

10. Make any additional configuration changes required. For example, if you changed memory allocations in your original Advisors installation, you must reconfigure those settings after migration. The settings revert to default values when you re-install the Advisors suite during a migration.

For detailed information, see relevant component chapters in the *Performance Management Advisors 8.1 Deployment Guide*. If you use Contact Center Advisor–Mobile Edition with a release earlier than 8.1.5, see *Performance Management Advisors Contact Center Advisor–Mobile Edition Deployment Guide*.

11. Apply the post-installation script, if required; apply the script only if the Platform migration script issued such a recommendation. The purpose of the post-installation script is to re-map existing object filters to the new filter IDs that are stored in the Genesys Configuration Server starting in release 8.1.5.

If you must apply the post-installation script, first ensure that you have completed the CCAdv/WA and AGA (for CCAdv) installation. Start all related services and wait for a successful run of several cycles with AGA delivering data. Once this is complete, stop the services and apply the Platform post-installation script that is supplied in the installation package. Repeat this procedure, if necessary.

12. After you have confirmed a successful upgrade to release 8.1.5, you can delete the AGA configuration database.

Pulse Advisors Migration Procedure – 8.5 Releases

Procedure:

Prerequisites

- Ensure that you have a backup of your current Advisors components and all associated configuration before migration. In particular, you must back up the Platform database. Genesys strongly recommends that you also back up the Metric Graphing database and the Advisors Genesys Adapter metrics database. Before proceeding with the migration procedure, ensure that your backup databases can be restored.

- **Important Security Information for Users of Linux Servers**

If you install Advisors components on Linux machines, be aware that there are additional security concerns related to Advisors installation. The Advisors installation wizards are graphical installers. To run these installers as they were intended, you require the X Windows System on your Linux machines.

Without the X Windows System, passwords that you enter during the installation process display in plain text; therefore, during installation, Genesys recommends that you take extra precautions to ensure that only users with the correct security permissions are allowed to view the screen where you are running the Advisors installers.

- **Important Information for Migration to Release 8.5.2:**

Migrating to release 8.5.2 removes all existing user preferences in all existing installations because of the significant UI changes in this release and the user preference management strategy that has been implemented.

- **Important Information for Migration to Release 8.5.100 in Oracle Environments:**

For migration to release 8.5.1, you must grant the Platform user a privilege that allows that user to create materialized views if you did not use the supplied deployment scripts to create the user. You must grant the privilege to the 8.5.001 user *before* you apply the migration script.

- **Important Information for Migration to Release 8.5.100 in Microsoft SQL Server Environments:**

- Starting with Performance Management Advisors release 8.5.100, the minimum supported version of Microsoft SQL Server is MS SQL Server 2008.
- Complete the following steps in the order listed:
 - i. Prior to the Platform database content migration, you must move the Platform database to an MS SQL Server of a supported version. See the *Genesys Supported Operating Environment Reference Guide* for the list of supported databases.
 - ii. You must upgrade the Platform database to release 8.5.001 before you begin the upgrade to release 8.5.100.

Steps

1. Ensure that all the external prerequisites are in place (see [Supporting Software Components](#)).
2. Upgrade your database software, if required.

3. Uninstall the previous version of each application from the server.

Important

The previous installation must be completely removed by deleting or renaming its installation directory.

Genesys recommends that you uninstall the Windows services for the Advisors CCAAdv XML Generator and Advisors Suite Server (that is, the Platform Server) before you rename or delete the installation directory. Uninstalling the Windows services requires files that are in the installation directories you are going to delete or rename.

If the migration fails and you must roll back to the previous version, changing the directory name to the original name suffices.

4. Migrate the databases. For migrations to Advisors release 8.5.2, see [Migrating Databases to Advisors Release 8.5.2](#) for additional information.

It is very important to migrate the databases in the order listed in the substeps following the Note.

In release 8.5.0, database migration includes deprecating schemas. In earlier releases, the Advisors suite required three schemas. Starting in release 8.5.0, the suite requires only two (the Frontline Advisor database is no longer required). As part of the database migration, described in the following substeps, you will remove the third schema's data.

Important

Important Information for Migrations of 8.5.0 Installations in an Oracle Environment

Before applying the 8.5.001 database migration script, check to see if any procedures have names starting with spMigrate. If such procedures exist, use the following script to remove them:

```
BEGIN
EXECUTE IMMEDIATE 'DROP PROCEDURE spMigrateCallCalcFA';
EXCEPTION WHEN OTHERS THEN NULL;
END;
/
BEGIN
EXECUTE IMMEDIATE 'DROP PROCEDURE spMigrateCallRaFA';
EXCEPTION WHEN OTHERS THEN NULL;
END;
/
BEGIN
EXECUTE IMMEDIATE 'DROP PROCEDURE spMigrateCustomMetricDirect';
EXCEPTION WHEN OTHERS THEN NULL;
END;
/
```

If the Platform 8.5.001 database migration script for Oracle issues errors on the first run, then you must re-apply the script.

- a. Migrate the AGA metrics databases. The AGA metrics database must be migrated before any other in any environment – Oracle or MSSQL.

Important

Important Information for Release 8.5.000

To migrate to release 8.5.000, you use scripts supplied by Genesys to remove old objects and then add new objects to the Advisors Genesys Adapter metrics database. Genesys provides two scripts for Oracle and one for MS SQL.

Migration of AGA Oracle METRICS Schema

1. Connect as the METRICS user.
2. Execute `gc_metrics_<version>_ObjectsDrop.sql`.
3. Execute `gc_metrics_new_<version>_ObjectsPlus.sql`.

Migration of AGA MS SQL Databases

1. Connect to the AGA metrics database.
2. Execute `gc_metrics_newdb_<version>.sql`.

Important Information for Release 8.5.100

Starting with release 8.5.1.00, it is no longer necessary to run `gc_metrics_<version>ObjectsDrop.sql` before running `gc_metrics_new<version>_ObjectsPlus.sql` when migrating the Advisors Genesys Adapter metrics database.

Migration of AGA Oracle METRICS Schema

1. Connect as the METRICS user.
2. Execute `gc_metrics_new_<version>_ObjectsPlus.sql`.

- b. Ensure you grant Select permissions for all AGA Metrics views to Advisors Platform.
- c. Make a backup of the Platform schema. Ensure that the backup can be successfully restored. Compare the restored and the original schema to ensure that they are identical.
- d. Migrate the Platform database.

For detailed information about which scripts to run and when, see the `Readme-advisors-platform-migrate.txt` file included in your Installation Package.

Important

Important Information About the Advisors Platform Release 8.5.101.17 Database Migration

Before you apply the migration scripts, complete the following steps:

1. Either you, as a privileged user, or your DBA, must run the following script to create a job class for Advisors:


```
advisors-platform-<version>_DBMS_SCHEDULER.sql
```
2. Either you, as a privileged user, or your DBA, must run the following commands:


```
GRANT CREATE JOB TO &&PLATFORM_USER;
GRANT EXECUTE ON SYS.GENADVISORSJOBCLASS TO &&PLATFORM_USER;
```

If you are upgrading an existing installation and you have the bulk configuration tool deployed, run the new version of the `bulkObjectsCre.sql` script. Take the script from the folder that corresponds to the configuration mode of the installation that you are upgrading.

e. For Migration to Release 8.5.000 only

Starting in release 8.5.0, the Frontline Advisor database is no longer required; the FA database content moves to the Platform database.

If you use Frontline Advisor in your enterprise, perform the following Steps in the order listed to migrate FA database content to the Platform database and to migrate FA metrics from release 8.1.5 to 8.5.0.

1. Run the Object Migration Wizard to transfer the 8.1.5 FA database content to the Platform database after you migrate the Platform database (see [Using the Frontline Advisor Database Transfer Migration Option](#)).
 2. Manually remove the FA metrics business attribute values before using the Object Migration Wizard to migrate FA metrics data. In the Genesys configuration interface that you use, the values are under the default tenant. The path is Business Attributes\Advisors Metrics\Attribute values\Frontline Advisor.
 3. Run the Object Migration Wizard to register the FA metrics in Genesys Configuration Server. The metrics transferred to the Platform database as part of [Step 1](#), and removed from the Genesys Configuration Server in [Step 2](#), need to be registered in Genesys Configuration Server for user access control.
- f. If you use Frontline Advisor with a Cisco data source, migrate the Advisors Cisco Adapter database. Note that the Advisors Cisco Adapter is available only for Advisors releases prior to release 8.5.2. Support for Cisco data sources is discontinued starting with Advisors release 8.5.2. Advisors Cisco Adapter release 8.5.100.09 was the final release for this Advisors component.
- g. If you use CCAAdv/WA, migrate the Metric Graphing database.

The script for the Metric Graphing database is included in the CCAAdv/WA installation package (IP). Starting in release 8.5.0, the script to migrate the Metric Graphing database includes the word "migrate" in the filename.

5. Migration to Release 8.5.1 only

New metrics were added to Advisors in release 8.5.1. Ensure you run the FA metrics and CCAAdv/WA metrics options in the Object Migration Wizard to register these metrics in Genesys Configuration Server. See [Object Migration Wizard](#) for information about using the wizard.

6. Migration to Release 8.5.1 only

Be aware that some Advisors components are controlled by the Genesys Solution Control Server (SCS) starting with release 8.5.1. Integration with the SCS means you must:

- Install the Local Control Agent (LCA) on each system that runs any of the components that integrate with SCS.
- Configure a Host in Genesys Configuration Server for each system that runs any of the components that integrate with SCS.
- Configure an Application in Genesys Configuration Server for each Advisors server that runs one or more of the components that integrate with SCS.

See the following pages in the *Genesys Performance Management Advisors Deployment Guide* for detailed information:

- [Deployment Summary](#)
- [Prerequisites](#)
- [Overview: Configuring Advisors Application Objects and Deploying Modules that are Controlled by SCS](#)
- [Integration with Solution Control Server and Warm Standby](#)

7. Install the Platform service.

8. Install the adapter(s).

Note that the Advisors Cisco Adapter is available only for Advisors releases prior to release 8.5.2. Support for Cisco data sources is discontinued starting with Advisors release 8.5.2. Advisors Cisco Adapter release 8.5.100.09 was the final release for this Advisors component.

For releases up to, but *not including* release 8.5.1 and later, also install the Windows service for the Adapter(s) you have installed. Starting with release 8.5.1, the adapters are controlled by the Genesys Solution Control Server and the Windows service is no longer required.

To install an Adapter core service, run the installation .jar file for the release to which you are migrating and ensure the option to install the service is selected as part of the server installation. For detailed information, see the [Performance Management Advisors Deployment Guide](#).

Important

Important Information for Migration to Release 8.5.2

Starting in release 8.5.2, you configure Stat Servers as connections to the Advisors Genesys Adapter (AGA) Application object in the Genesys Configuration Server. See [Manage Advisors Stat Server Instances](#) for information. There is an option on the Advisors migration wizard that, when selected, performs the migration operation for all configured adapters in a single pass. You run the export option only once. Be sure to run the option after migrating to release 8.5.2, but before you start any of the adapters. See [Migrating Stat Server-Adapter Relationships from the Platform Database to Configuration Server](#), in this guide. Alternatively, you can manually configure the Stat Server connections and the Stat Server types using a Genesys configuration interface, such as Genesys Administrator. You might do this for security reasons, for example.

Important

Important Information for Migration to Release 8.5.1

Starting in release 8.5.1, Stat Server registration is no longer done during deployment. Previously, you input Stat Server connection information in installer screens, which registered the Stat Servers. In release 8.5.1 and later, you execute dedicated database procedures against the Advisors Platform database to:

- register or remove Stat Server instances
- add, edit, or remove Stat Server configuration settings related to Advisors

After you install Advisors Genesys Adapter, you must run the stored procedure to register the Stat Servers and associate Stat Servers with adapters. See the [Performance Management Advisors Deployment Guide](#) for information.

9. Install one or more of the Advisors components, such as Contact Center Advisor, Workforce Advisor, CCAAdv XML Generator, Frontline Advisor, and/or Resource Management, as required in your deployment.

The order in which you install the preceding Advisors components is not important. However, you must plan the installation and be ready to specify XML Generator application names when prompted by installers. Specify the application names in the Applications section of Genesys Administrator before deployment. The application names you provide in installers must exactly match the names specified in Configuration Server. See the [Prerequisites](#) and the [deployment procedures](#) in the *Performance Management Advisors Deployment Guide* for detailed information.

Important

- Resource Management is not available in a Cisco-only configuration.
- XML Generator is required for Contact Center Advisor to function. XML Generator is not used in the WA application, although XML Generator must run at least one cycle immediately after you install it. This is necessary to generate a set of views used by CCAdv and WA to access metrics data sources.

XML Generator also loads metadata during this cycle: names of switches, applications, agent groups, and the relationships among them, which are subsequently used in CCAdv and WA configuration.

- If you install a new version of Contact Center Advisor in an environment that uses Contact Center Advisor–Mobile Edition, first uninstall Mobile Edition, install the new Contact Center Advisor software, and then re-install Mobile Edition software. CCAdv-ME is an optional module included in the CCAdv installation file.

10. Make any additional configuration changes required. For example, if you changed memory allocations in your original Advisors installation, you must reconfigure those settings after migration. The settings revert to default values when you re-install the Advisors suite during a migration.

For detailed information, see relevant component chapters in the *Performance Management Advisors Deployment Guide*.

Next Steps

Genesys recommends that you review the metric counts and make sure that your existing Stat Server configuration continues to correspond to the expected load. See the "Performance Management Advisors" chapter in the *Genesys Hardware Sizing Guide* for information about estimating the number of requested statistics for Frontline Advisor.

Migrating Databases to Advisors Release 8.5.2

Content on this page is specific to migrating your Genesys Performance Management Advisors database installations to Advisors release 8.5.2.

General Considerations

- Starting with Advisors release 8.5.202, both the Platform and the Metric Graphing database scripts are supplied in the Platform IP in the `ip\platform-database-sql` and `ip\metric-graphing-database-sql` folders, respectively.
- Upgrade all AGA metrics schemas before you start the Platform schema upgrade.
- If you have the Bulk Configuration tool installed, you need to upgrade it separately by executing the `blkObjectsCre.sql` script taken from the corresponding folder in `ip\platform-database-sql\<rdbms>\bulkconfig`. The `blkObjectsCre.sql` script must be applied after the general migration script is applied.

Migrating MS SQL Server Databases to Advisors Release 8.5.2

To migrate MS SQL Server databases to release 8.5.2:

1. Stop all Advisors components.
2. Apply the `gc_metrics_db_<version>.sql` script, supplied in the `ip\configuration-schema\mssql` folder of the AGA installation package, to the AGA metrics database of any version.
3. Apply the `advisors-platform-migrateSchema_8.5.101(102)-<version>.sql` script, supplied in the corresponding folder within the `ip\platform-database-sql\mssql\` folder, to the Platform database of any version between, and including, 8.5.101 and the current release.
4. Apply the `mg-new-database-<version>.sql` script, supplied in the corresponding folder within the `ip\metric-graphing-database-sql\` folder, to the metric graphing database of any version between, and including, 8.5.101 and the current release.

Migrating Oracle Schemas to Advisors Release 8.5.2

If you use Oracle databases in your environment, use the procedure on this page to migrate to Advisors release 8.5.2.

Prerequisites

- Ensure that you have a backup of your current Advisors components and all associated configuration before migration. In particular, you must back up the Platform database. Genesys strongly recommends that you also back up the Metric Graphing database and the Advisors Genesys Adapter metrics database. Before proceeding with the procedure on this page, ensure that your backup databases can be restored.
- If you moved Advisors schemas to another Oracle database, run the `DBMS_SCHEDULER.sql` script as a privileged user to create a job class for Advisors, or ask your DBA to run the script. This is a one-time, database-wide operation that does not need to be repeated as long as the same Oracle database is used.
- Advisors release 8.5.2 supports the Oracle 12C In-Memory option. If you choose to use the In-Memory option, have your DBA enable the option. Enabling the option can result in extra charges from Oracle, so make sure you have confirmed the choice with your management team.
- Advisors release 8.5.2 needs the Oracle JServer Java Virtual Machine component installed in the Oracle database. If the component is not installed, and cannot be added to the existing Oracle installation, ask your DBA to grant the following privilege:

```
GRANT EXECUTE ON SYS.DBMS_LOCK TO <Platform schema owner>;
```

1. Migrate the AGA metrics schema objects.

Note that there is no need to run the `gc_metrics_<version>_ObjectsDrop.sql` script before the object creation script while upgrading the AGA metrics schema. The object creation script will replace the existing objects, where necessary. Do one of the following:

- If you use SQL*Plus, apply the `gc_metrics_<version>_ObjectsPlus.sql` script while connected as the AGA Metrics schema owner.
- If you want all of the AGA metrics objects recreated in the AGA Metrics user default tablespace, connect as the AGA Metrics schema owner and run the `gc_metrics_<version>_ObjectsDefault.sql` script from Oracle SQL Developer or SQL*Plus.
- If you want to separate the AGA metrics objects by placing them into different tablespaces, and want to use SQL Developer, then run the `gc_metrics_<version>_ObjectsCustom.sql` script while connected as AGA Metrics schema owner.

After you have performed one of the preceding actions, then do the following, if applicable:

- If you are using the In-Memory option, then execute `gc_metrics_<version>_INMEMORY.sql` in AGA metrics schema. This change can be easily reverted at any time by running the `gc_metrics_<version>_NO_INMEMORY.sql` script.

Finally, perform the following **mandatory** action:

- Grant select permissions to the Platform user on all views contained in the migrated AGA metrics schema. If such permissions were granted earlier, you still have to re-issue them before you proceed to the next Step.

Repeat all of the above for each schema if you use more than one AGA metrics schema.

2. Migrate the Platform schema objects.

To migrate the Platform schema objects, do the following:

- Ask your DBA to grant the following privileges to the Platform schema owner:

```
GRANT EXECUTE ON SYS.GENADVISORSJOBCLASS TO &&platformschemaowner;
GRANT CREATE JOB TO &&platformschemaowner;
```

- Make sure that the Platform schema owner has select privileges to all views that belong to all GENESYS sources listed in the Platform ICM_DATABASE table.

To verify the privileges, connect as the Platform schema owner and run the following set of queries for each <AGA Metrics Schema Name> listed in the Platform ICM_DATABASE table.

```
SELECT * FROM <aga metrics="" schema="" name="">.AGENT_SKILL_GROUP_REAL_TIME WHERE ROWNUM<2;
SELECT * FROM <aga metrics="" schema="" name="">.CALL_TYPE WHERE ROWNUM<2;
SELECT * FROM <aga metrics="" schema="" name="">.CALL_TYPE_REAL_TIME WHERE ROWNUM<2;
SELECT * FROM <aga metrics="" schema="" name="">.CONTROLLER_TIME WHERE ROWNUM<2;
SELECT * FROM <aga metrics="" schema="" name="">.INTERACTION_QUEUE WHERE ROWNUM<2;
SELECT * FROM <aga metrics="" schema="" name="">.INTERACTION_QUEUE_REAL_TIME WHERE ROWNUM<2;
SELECT * FROM <aga metrics="" schema="" name="">.LOGICAL_INTERFACE_CONTROLLER WHERE ROWNUM<2;
SELECT * FROM <aga metrics="" schema="" name="">.PERIPHERAL WHERE ROWNUM<2;
SELECT * FROM <aga metrics="" schema="" name="">.PERIPHERAL_REAL_TIME WHERE ROWNUM<2;
SELECT * FROM <aga metrics="" schema="" name="">.SERVICE WHERE ROWNUM<2;
SELECT * FROM <aga metrics="" schema="" name="">.SERVICE_MEMBER WHERE ROWNUM<2;
SELECT * FROM <aga metrics="" schema="" name="">.SERVICE_REAL_TIME WHERE ROWNUM<2;
SELECT * FROM <aga metrics="" schema="" name="">.SKILL_GROUP WHERE ROWNUM<2;
SELECT * FROM <aga metrics="" schema="" name="">.SKILL_GROUP_REAL_TIME WHERE ROWNUM<2;
SELECT * FROM <aga metrics="" schema="" name="">.QUEUE_SET1_REAL_TIME WHERE ROWNUM<2;
SELECT * FROM <aga metrics="" schema="" name="">.QUEUE_SET2_REAL_TIME WHERE ROWNUM<2;
```

- Re-issue the select privileges on any <AGA Metrics Schema Name> views where they are missing. To do this, connect as an AGA Metrics schema owner, issue the following command, copy the result, and execute it as a script while connected as the AGA Metrics schema owner:

```
SELECT 'GRANT SELECT ON '||view_name||' to <platform schema owner>;' FROM USER_VIEWS;
```

Once all privileges are in place, proceed to the next item.

- Verify that there are no live sessions from any machine that hosts the Advisors components, or ask your DBA to implement this verification. Any hanging sessions can be killed.
- Connect as the Platform user and execute the advisors-platform-migrateSchema_8.5.101(102)_<version>.sql script supplied in the Platform installation package. If you have your Platform schema in a database that does not have the JServer component installed, use the migration script for the database installation without JServer. The migration script for Oracle that does not have JServer installed can be located in the /ip/sql/platform-database-sql/oracle/oracleNoJserver directory.
- Wait for the Platform script to finish the execution.
- Verify that the PATCH_LOG table contains a record about the applied migration script.
- If you are using the In-Memory option, execute the advisors-platform-<version>_INMEMORY.sql script. If necessary, this change can be easily reverted by running the advisors-platform-<version>_NO_INMEMORY script.
- If you have the bulk configuration tool installed, upgrade it by running the blkObjectsCre.sql script taken from the corresponding folder in the \ip\platform-database-sql\oracle\bulkconfig directory.

- Review and consider the information provided in the [Database Recommendations for Oracle Users](#) section of the *Genesys Performance Management Advisors Deployment Guide*.
- If you are migrating to Advisors release 8.5.202.09, and you have an installation with CISCO ICM, you must apply the `advisors-platform-8.5.202.09_CiscoPostInstall.sql` post-installation script, which can be found in the `\ip\platform-database-sql\oracle\CISCO` folder. The script must be applied before you start any of the 8.5.202.09 components for the first time.

If you make a mistake and start the components before you apply this script, stop all components, verify that there are no live sessions from any machine that hosts Advisors components, connect as the Platform schema owner, and issue the following command:

```
DELETE tmpImportCallType;  
COMMIT;
```

- Once that has completed, re-run the `advisors-platform-8.5.202.09_CiscoPostInstall.sql` script. In addition to the preceding action, you can also repeat the verification script described in the [Database Recommendations for Oracle Users](#) section of the *Performance Management Advisors Deployment Guide*.

There is no negative impact if you execute the `advisors-platform-8.5.202.09_CiscoPostInstall.sql` script more than once, or if you execute the script in installations that do not use CISCO ICM.

3. Migrate the metric graphing schema.

To migrate the metric graphing schema:

- You can completely recreate the metric graphing schema as there is no need to preserve any data in it, or you can run the `migrate_mg_8.5.101.15_<version>.sql` migration script against the existing schema.
- If you are using the In-Memory option, then execute the `mg-<version>_INMEMORY.sql` script against the metric graphing schema. This change can be easily reverted by running the `mg-<version>_NO_INMEMORY` script.

Other considerations

In addition to migrating the Oracle databases according to the preceding procedure, be sure to read the following notes carefully for additional work that might be required in your environment.

- Make sure that you do not mention any data sources in the CCAdv/WA installer, or, if you do, be sure to specify the names that exactly match the current `ICM_DATABASE` content.
- If any schema listed in the Platform `ICM_DATABASE` table no longer needed, it must be removed from Platform `ICM_DATABASE` table and the corresponding AGA metrics schema must be dropped from the Oracle database. Contact Genesys support if you have difficulties with deleting the obsolete entry from the Platform `ICM_DATABASE`.
- Starting with Advisors release 8.5.202, the Advisors components can access the database using low-

privileged, runtime application user accounts (Oracle installations) or database user accounts (MS SQL Server installations) rather than schema/database owner accounts.

If you choose the least privilege option for your current installation, or if you had the “Least Privileges” setup in your previous installation, then before you run the Advisors installation wizards, make sure that you do the following:

- Reinststate all privileges granted in the previous installation, if applicable.
- Grant new object privileges by following the instructions contained in the following section of the Pulse Advisors Deployment Guide: [Least Privileges: How to Configure Advisors Database Accounts with Minimal Privileges](#).

In Oracle installations, the minimum version of Oracle with which you can use the “Least Privileges” feature is Oracle 12c R2.

- After running the installer wizards, verify the content of the AGA_INSTANCES and CLUSTER_MEMBER tables and remove obsolete content, if any exists.
- If you see an "ORA-28040: No matching authentication protocol" error in the XML Generator application log, do not try to start the application again; the XML Generator Oracle user account might lock if XML Generator makes too many attempts to start.
Have your DBA review the issue and follow his/her recommendation.

Resolving the issue might require a stronger password or possibly lowering the SQLNET.ALLOWED_LOGON_VERSION_SERVER setting to an acceptable level.

Pulse Advisors Migration Procedure – 9.0 Releases

Procedure: Migrating the Advisors Applications to Release 9.0

Prerequisites

- Ensure that you have a backup of your current Advisors components and all associated configuration before migration. In particular, you must back up the Platform database. Genesys strongly recommends that you also back up the Metric Graphing database and the Advisors Genesys Adapter metrics database. Before proceeding with the migration procedure, ensure that your backup databases can be restored.
- Starting with release 9.0, the Object Configuration User is no longer required or used in an Advisors deployment. In addition, this user is not required by the migration utilities or any migration procedure when upgrading to Advisors release 9.0.0. However, in case you have to roll back to release 8.5.2, Genesys recommends that you keep the Object Configuration User in the Configuration Server until you have verified that you have a successful installation of Advisors release 9.0.
- Genesys recommends that you read the [Database Recommendations for MS SQL Server Users](#) and [Database Recommendations for Oracle Users](#) sections in the *Pulse Advisors Deployment Guide* before proceeding with this migration procedure.
- There are changes to the default location for log file storage starting with Advisors release 9.0.001; when installing components, you might have to specify the log file storage location. For more information about log files, see [Adjust Logging Settings](#) and [Configure Administrative Actions Logs](#) in the *Pulse Advisors Deployment Guide*.
- **Important Security Information for Users of Linux Servers**
If you install Advisors components on Linux machines, be aware that there are additional security concerns related to Advisors installation. The Advisors installation wizards are graphical installers. To run these installers as they were intended, you require the X Windows System on your Linux machines.

Without the X Windows System, passwords that you enter during the installation process display in plain text; therefore, during installation, Genesys recommends that you take extra precautions to ensure that only users with the correct security permissions are allowed to view the screen where you are running the Advisors installers.

Steps

1. Ensure that all the external prerequisites are in place (see [Supporting Software Components](#)).
2. Upgrade your database software, if required.
3. Uninstall the previous version of each application from the server.

Important

The previous installation must be completely removed by deleting or renaming its installation directory.

Genesys recommends that you uninstall the Windows services for the Advisors CCAAdv XML Generator and Advisors Suite Server (that is, the Platform Server) before you rename or delete the installation directory. Uninstalling the Windows services requires files that are in the installation directories you are going to delete or rename.

If the migration fails and you must roll back to the previous version, changing the directory name to the original name suffices.

4. Migrate the databases.

It is very important to migrate the databases in the following order:

- a. Migrate the AGA metrics databases. The AGA metrics database must be migrated before any other in any environment – Oracle or MSSQL.
- b. Ensure you grant Select permissions for all AGA Metrics views to Advisors Platform.
- c. Make a backup of the Platform schema. Ensure that the backup can be successfully restored. Compare the restored and the original schema to ensure that they are identical.
- d. Migrate the Platform database.

Important

If you are implementing a migration from an earlier Advisors release, be sure to review the [data migration paths](#) before starting your migration.

If any of the Oracle Platform migration scripts issue the following error, ORA-20001: spCreateOneSourceView ORA-01031: insufficient privileges, and you are sure that the Platform user has been issued all necessary privileges, then you might have role-based Oracle security set for the Platform user. Make sure you take the migration script from the **current_user** sub-folder in the installation package. You can apply the correct script on top of the one that you applied previously. If your installation package does not contain such a folder, edit the script by replacing all entries of DEFINER with CURRENT_USER and re-apply the script; if you prefer, you can contact Genesys Support to obtain the edited script. Alternatively, you can set up the enhanced Oracle security to run Advisors applications as an application user with least privileges. For instructions, see [Least Privileges: How to Configure Advisors Database Accounts with Minimal Privileges](#).

- e. If you use CCAAdv/WA, migrate the Metric Graphing database.

The script for the Metric Graphing database is included in the CCAAdv/WA installation package (IP). The script to migrate the Metric Graphing database includes the word “migrate” in the filename.

5. Be aware that some Advisors components are controlled by the Genesys Solution Control Server (SCS). Integration with the SCS means you must:
 - Install the Local Control Agent (LCA) on each system that runs any of the components that integrate with SCS.
 - Configure a Host in Genesys Configuration Server for each system that runs any of the components that integrate with SCS.

- Configure an Application in Genesys Configuration Server for each Advisors server that runs one or more of the components that integrate with SCS.

See the following pages in the *Genesys Pulse Advisors Deployment Guide* for detailed information:

- [Deployment Summary](#)
- [Prerequisites](#)
- [Overview: Configuring Advisors Application Objects and Deploying Modules that are Controlled by SCS](#)
- [Integration with Solution Control Server and Warm Standby](#)

6. Install the Platform service.

7. Install the Advisors Genesys Adapter(s).

8. Install one or more of the Advisors components, such as Contact Center Advisor, Workforce Advisor, CCAdv XML Generator, Frontline Advisor, and/or Resource Management, as required in your deployment, and the associated Web Services and adapters.

The order in which you install the preceding Advisors components is not important. However, you must plan the installation and be ready to specify XML Generator application names when prompted by the installation wizards. Specify the application names in the **Applications** section of Genesys Administrator before deployment. The application names you provide in the installation wizards must exactly match the names specified in Configuration Server. See the [Prerequisites](#) and the [deployment procedures](#) in the *Pulse Advisors Deployment Guide* for detailed information.

Important

XML Generator is required for Contact Center Advisor to function. XML Generator is not used in the WA application, although XML Generator must run at least one cycle immediately after you install it. This is necessary to generate a set of views used by CCAdv and WA to access metrics data sources.

XML Generator also loads metadata during this cycle: names of switches, applications, agent groups, and the relationships among them, which are subsequently used in CCAdv and WA configuration.

9. You must run the `advisors-platform-<targetversion>_ValidateDatabaseInstall.sql` script as the schema owner after you install XML Generator and before you start it.

10. Make any additional configuration changes required. For example, if you changed memory allocations in your original Advisors installation, you must reconfigure those settings after migration. The settings revert to default values when you re-install the Advisors suite during a migration.

For detailed information, see relevant component chapters in the *Pulse Advisors Deployment Guide*.

11. If you use metric or object segmentation filters and you are migrating to a 9.0 release for the first time, then run the Object Migration utility using the `Reconfigure Advisors Filters Business Attributes` option to update your existing filter configuration to be compatible with release 9.0 configuration. You can find more information about this option on the [Object Migration Utility](#) page in this Guide.

Next Steps

- After you have verified a successful migration to release 9.0, you can remove the Object Configuration User from your configuration. Starting with release 9.0, the Object Configuration User is no longer required or used in an Advisors deployment.

- Genesys recommends that you review the metric counts and make sure that your existing Stat Server configuration continues to correspond to the expected load. See the [Genesys Pulse Advisors Hardware Sizing Guide](#) for information about estimating the number of requested statistics for Frontline Advisor.

Advisors Migration Utilities

There are two Advisors migration utilities:

- **User Migration Utility** – For migration from Advisors 3.3, 8.0, 8.1.0 to 8.1.1.
- **Object Migration Wizard** – For migration from Advisors 8.1.1 to 8.1.2 and higher.

When to run the migration utilities

In general, you run the migration utilities, as required, after you have migrated your databases. If there are specific requirements for use of the migration utilities, those requirements are included in the migration procedures in this chapter (see [Migrating the Advisors Applications – 8.1 Releases](#) and [Migrating the Advisors Applications – 8.5 Releases](#)).

The User Migration Utility is used only when moving to release 8.1.1; the utility moves the Advisors users from the Advisors Platform database to the Genesys Configuration Server.

The Advisors Object Migration wizard can migrate objects and metrics; you choose options in the wizard to migrate objects of your choice. You use the Object Migration wizard only when migrating to release 8.1.2 or later. The options available to you in the wizard differ by release; the data that the wizard can move from Advisors Platform to Configuration Server is release-dependent.

User Migration Utility

The User Migration Utility is used only when moving to release 8.1.1; the utility moves the Advisors users from the Advisors Platform database to the Genesys Configuration Server. Subsequently, user configuration functionality moves to a Genesys configuration interface, such as Genesys Administrator Extension (GAX). The User Migration Utility is packaged with the Advisors Platform distribution starting in release 8.1.2. The utility migrates user and contact records, along with users' module access information from the 3.3, 8.0, or 8.1.0 Advisors Platform database to the Genesys Configuration Server. Specifically the following user information is migrated:

- User name
- Password
- First name
- Last name
- Email
- Employee ID
- Whether the user is an agent or not
- User's module access information
- User's role information

The utility contains a `ReadMe.txt` file that summarizes the use of the tool and the procedure to run the tool.

Procedure: Running the User Migration Utility

Purpose: To migrate users held in the 3.3, 8.0, or 8.1.0 Advisors database to the Genesys Configuration Server.

Prerequisites

- Before you run the user migration utility, ensure you have a supported version of Java installed and `JAVA_HOME` is added to system classpath.
- The Genesys configuration interface user that you specify must have Read, Create, and Change permissions on the selected tenant.

Steps

1. Extract the `user-migration-util-<version>.zip` file from the `advisors-platform-distribution-<version>.zip/ip/supplement` folder.
2. Go to the `conf` folder in the extracted directory and edit the `migration.properties` file. Follow the configuration comments in the file and enter the configuration values. Save the file.
3. Open the command prompt and change to the directory where the `migration.bat` file is extracted.
4. Run the following command on the command prompt:
`migration.bat`
5. When the migration is complete, review the log for errors or warnings.

Object Migration Utility

The Advisors Object Migration Utility is packaged with the Advisors Platform distribution. Use the Advisors Object Migration Utility when you first install Advisors in an environment with a new Configuration Server or when you move an existing Advisors installation to a new Configuration Server.

If any of the required Business Attributes folders that Advisors components use are not already present in the Configuration Server, then the Advisors Object Migration Utility creates those folders and populates them with the following:

- Advisors metrics that exist in the Platform database, including all custom metrics, if any.
- Advisors hierarchy objects if they exist in the Platform database. Starting with Advisors release 9.0.001.06, a brand new Platform database contains a set of Advisors default hierarchy objects that must be added to the Configuration Server to make the automatic configuration visible on the dashboard. The automatic configuration consists of all base objects mapped to the default hierarchy. For more information, see [Contact Center Advisor Default Rollup Configuration](#) in the *Contact Center Advisor and Workforce Advisor Administrator User's Guide*.

With the introduction of role-based access control (RBAC) in release 8.1.2 (for information, see the [Pulse Advisors Contact Center Advisor/Workforce Advisor Administrator User's Guide](#)), many configuration objects moved to the Genesys Configuration Server.

In release 8.1.2 and later, many of the objects you use to configure the Advisors modules exist in Genesys Configuration Server. That is, what you see in Genesys Configuration Server is what you have to build your Advisors configuration. You use the Advisors Object Migration Utility to automate the migration of objects from databases to Configuration Server. Any object you will require in your configuration must be either migrated from an earlier release using the Object Migration Utility, or you must manually create the objects in your Genesys configuration interface.

You can select only one option at a time for migration, but you can run the migration tool as many times as required to migrate all objects and metrics.

Be aware of any new privileges added to Advisors after release 8.1.2. Those new privileges have never been defined in any existing Advisors role in the Configuration Server; they cannot be migrated using a migration utility. To use new privileges added to Advisors after release 8.1.2, an administrative user must update existing roles or create new roles and add the privilege to allow the described access or activity.

Migration Paths

In general, migration of CCAAdv/WA metrics data is a required step of your Contact Center Advisor/Workforce Advisor migration, but migration of other CCAAdv/WA objects is optional. If you use Frontline Advisor, migration of FA metrics data is a required step. See below for additional release-specific information.

All Releases

The following migration options are provided by the installer for all Advisors releases that use the Object Migration Utility:

- Migrating the Frontline Advisors metrics data – The FA migration path involves exporting the FA metrics from the FA database to the Configuration Server. Only those FA metrics that are not present in Configuration Server are migrated.
- Migrating the Contact Center Advisor/Workforce Advisor data – The CCAdv/WA option migrates the following:
 - Metrics for both CCAdv and WA.
 - Metadata records of contact centers, application groups, and regions (geographic, reporting, and operating units).

Release 8.1.5

Starting in Release 8.1.5, the AGA configuration database is not required. The AGA configuration database data moves to Advisors Platform and Genesys Configuration Server. To transfer the data correctly, the Object Migration Utility includes a Genesys Adapter Configuration Migration option that moves:

- AGA source metric definitions and statistics templates to the Platform database
- Configured objects and filters to the Configuration Server

For detailed information about this option and the removal of the AGA configuration database (`advisors_genadptdb`), see the *Performance Management Advisors 8.1 Deployment Guide* for releases 8.1.2 and later. See [Migrating the Advisors Applications – 8.1 Releases](#) for details about running the Object Migration Utility to move the AGA configuration database data.

Release 8.5.0

Starting in release 8.5.0, FA no longer has a standalone database. The FA database content moves to the Advisors Platform database. The Object Migration Utility includes an option in release 8.5.0 to move the FA database content to the Platform database (Frontline Advisor Database Transfer). If you use FA, you must run the FA options in the Object Migration Utility in this order:

1. Frontline Advisor Database Transfer – For more information, see [Using the Frontline Advisor Database Transfer Migration Option](#).
2. Frontline Advisor Metrics

Release 8.5.2

Starting in release 8.5.2, you configure Stat Servers as connections to the Advisors Genesys Adapter (AGA) Application object in the Genesys Configuration Server. You can add a Stat Server primary/backup pair (or more than one) to each adapter's configuration. If you have Genesys Performance Management Advisors release 8.5.1 deployed in your enterprise, then you can use the Object Migration Utility to export the existing Stat Server configuration from the Advisors Platform database to the Configuration Server in order to add the connections to the AGA Application object. After the

Stat Server connections are configured to the AGA Application object, the Stat Server-to-AGA relationships, as well as the object-to-Stat Server mapping, continues to be stored in the Advisors Platform database. For more information, see [Migrating Stat Server-Adapter Relationships from the Platform Database to Configuration Server](#).

Release 9.0.0

Starting with Advisors release 9.0.0, there are changes to how you configure Advisors object filters. In earlier releases, you configured the filter expression in the **Description** field of the Filter Business Attribute. Starting with release 9.0, you configure the filter expression as an Annex option on the Filter Business Attribute. The Annex must contain a mandatory section called **Filter**. In this **Filter** section, you enter an option that defines the filter. Enter the filter expression in the **Option Value** field when you create the filter option. For more information about Advisors filter configuration for release 9.0, see [Using Advisors Filters Configuration to Segment Objects and Metrics](#) in the *Genesys Contact Center Advisor and Workforce Advisor Administrator User's Guide*.

The migration utility that ships with Advisors release 9.0.0 includes an option - Reconfigure Advisors Filters Business Attributes - that, when selected, automatically updates your existing filter configuration from earlier releases to be compatible with release 9.0 configuration. When you select the Reconfigure Advisors Filters Business Attributes option and run the Object Migration Utility, you are prompted for the Configuration Server details. The Configuration Server user that you specify must have Read and Change permissions on the Advisors Filters Business Attributes under the default tenant in the Configuration Server in order to update the filter configuration.

Starting with release 9.0, the Object Configuration User is no longer required or used in an Advisors deployment. In addition, this user is not required by the migration utilities or any migration procedure when upgrading to Advisors release 9.0.0. In case you have to roll back to release 8.5.2, Genesys recommends that you keep the Object Configuration User in the Configuration Server until you have verified that you have a successful installation of Advisors release 9.0. Once you have successfully migrated to release 9.0.0, you can remove this user from your configuration. Also see the [migration procedure for release 9.0](#).

Object Migration Procedures

Use the following procedures with the Advisors Object Migration utility:

- [Running the Object Migration Utility](#)
- [Using the Contact Center/Workforce Advisor Objects Migration Option](#)
- [Using the Frontline Advisor Metrics Migration Option](#)
- [Using the Genesys Adapter Configuration Migration Option](#)
- [Using the Frontline Advisor Database Transfer Migration Option](#)
- [Migrating Stat Server-Adapter Relationships from the Platform Database to Configuration Server](#)

Procedure: Running the Object Migration Utility

Prerequisites

- Ensure a supported version of Java is installed.
- If you must run the User Migration Utility, ensure you run it before running the Object Migration Utility.
- If you are migrating from release 8.1.5 to 8.5.0, the database migration scripts must be executed before running this Object Migration Utility.
- The Configuration Server user supplied must have read, create, and change permissions on the selected tenant.

Steps

1. Extract the file `advisors-migration-wizard-<version>.jar` from the `advisors-platform-distribution-<version>.zip/ip/supplement` folder.
2. Open the command prompt and change to the directory where the file `advisors-migration-wizard-<version>.jar` is extracted.
3. Run the following command:

```
java -jar advisors-migration-wizard-<version>.jar
```

The Object Migration Utility launches; click **Next**.

4. Select the migration path and click **Next**.

You can select only one migration option in a single run of the utility, but you can run the utility as many times are necessary to complete your migration. For more information about each migration option, go to the relevant procedure:

- [Using the Contact Center/Workforce Advisor Objects Migration Option](#)
- [Using the Frontline Advisor Metrics Migration Option](#)
- [Using the Genesys Adapter Configuration Migration Option](#)
- [Using the Frontline Advisor Database Transfer Migration Option](#)

Procedure: Using the Contact Center/Workforce Advisor Objects Migration Option

Purpose: To migrate Contact Center Advisor/Workforce Advisor objects and metrics. You can also migrate existing module access privileges using this option; although this option is placed

under the CCAdv/WA migration path, it migrates the module privileges for all Advisors components.

Steps

1. Select the items you want to migrate from the Advisors database. You can select more than one item at a time, but the following rules apply:
 - You must migrate your CCAdv/WA metrics, but migration of other data and objects is optional.
 - You must migrate contact center objects before you can migrate contact center permissions.
 - You must migrate application groups before you can migrate application group permissions.

Click **Next**.

2. Select the type of database you use in your enterprise and enter information in fields, as requested.

The migration utility prompts for information about database types supported in the release to which you are migrating. For example, in releases where Oracle RAC was first introduced, the utility prompts you for the location of the file that contains the JDBC URL when you select the Oracle RAC database type. You can find information about prompts, and the type of information to enter at prompts, in the [deployment procedures](#) in the *Pulse Advisors Deployment Guide*.

Click **Next**.

3. The **Migration Source Database** screen prompts for connection details for the Platform database.

After you enter your information on the screen, click **Next**.

4. Enter details about the Genesys Configuration Server to which selected objects are to be migrated. Click **Next**. The **Installation Progress** screen displays.
5. If required, check the details you have entered by clicking the **Show Details** button. When the details are correct, click **Install** to proceed with the migration.
6. When the migration is complete, review the log for errors or warnings.

Procedure: Using the Frontline Advisor Metrics Migration Option

Purpose:

To register Frontline Advisor metrics in Genesys Configuration Server for user access control as part of an Advisors upgrade or a new installation. If you are migrating from FA release 8.1.5 to 8.5.0, you must run the Frontline Advisor Database Transfer migration option before you run the Frontline Advisor Metrics migration option.

To migrate module access privileges, you must run the Contact Center/Workforce Advisor Objects migration option; although the option to migrate module access privileges is placed

under the CCAdv/WA migration path, it migrates the module privileges for all Advisors components.

Steps

1. Select the type of database you use in your enterprise and enter information in fields, as requested.

The migration utility prompts for information about database types supported in the release to which you are migrating. For example, in releases where Oracle RAC was first introduced, the utility prompts you for the location of the file that contains the JDBC URL when you select the Oracle RAC database type. You can find information about prompts, and the type of information to enter at prompts, in the [deployment procedures](#) in the *Pulse Advisors Deployment Guide*.

Click **Next**.

2. For migration to releases up to – and including – release 8.1.5, the **Migration Source Database** screen prompts for connection details for the Frontline Advisor database.

For migration to release 8.5.0+, you must enter connection details for the Advisors Platform database on the **Migration Source Database** screen.

After you enter your information on the screen, click **Next**.

3. Enter details about the Genesys Configuration Server to which selected objects are to be migrated.

Click **Next**. The **Installation Progress** screen displays.

4. If required, check the details you have entered by clicking the **Show Details** button. When the details are correct, click **Install** to proceed with the migration.
5. When the migration is complete, review the log for errors or warnings.

Procedure: Using the Genesys Adapter Configuration Migration Option

Purpose: Starting in release 8.1.5, the AGA configuration database is no longer used. The Genesys Adapter Configuration Migration option is available to migrate from Advisors release 8.1.4 to release 8.1.5. The tool also supports migrating from Release 8.1.3 to 8.1.5, but source metrics added for Frontline Advisor in Release 8.1.4 are not migrated. The option migrates data from the Advisors Genesys Adapter configuration database to the Advisors Platform database and Genesys Configuration Server, as required. See the [Performance Management Advisors 8.1 Deployment Guide](#) for additional information.

Prerequisites

- Create the Object Configuration User before running the Genesys Adapter Configuration Migration option; the migration option prompts you for the Object Configuration User information. See the *Performance Management Advisors 8.1 Deployment Guide* for details about the Object Configuration User.
- For best results, Genesys recommends that you configure the following permissions for the Configuration Server user that you will specify in the migration utility **Step 4**:
 - Change Permissions access permissions to update the security permissions of the monitored objects.
 - Change access permission to update the annex properties of the monitored objects.
 - Create and Change access permissions to create and update business attributes.

Steps

1. Select the type of database you use in your enterprise.

If you select Oracle, the utility also prompts you for the following information:

- Oracle setup - Select the option that describes your environment:
 - Select the Basic option if you use a single-instance Oracle database.
 - Select the RAC connectivity setup option if you use Oracle RAC.
- Oracle JDBC driver location

Click **Next**.

2. The **Migration Source Database** screen prompts for connection details for the AGA configuration database. Enter your information, and click **Next**.
3. The **Migration Destination Database** screen prompts for connection details for the Platform database. Enter your information, and click **Next**.
4. Enter details about the Genesys Configuration Server to which selected objects are to be migrated. See **Prerequisites** for important information about the Configuration Server user. (The Config Server Name is the name of the application (for example, confserver).) Click **Next**.
5. Enter the Object Configuration User you configured for Data Manager.
Click **Next**. The **Installation Progress** screen displays.
6. If required, check the details you have entered by clicking the **Show Details** button. When the details are correct, click **Install** to proceed with the migration.
7. When the migration is complete, review the log for errors or warnings.

Procedure: Using the Frontline Advisor Database Transfer Migration Option

Purpose:

Starting in release 8.5.0, Frontline Advisor data is stored in the Advisors Platform database. Use the Frontline Advisor Database Transfer option to migrate from Advisors release 8.1.5 to release 8.5.0 only; do not use this option during migration to any other release.

To migrate from FA release 8.1.5 to 8.5.0, you must migrate the FA data from the FA database to the Platform database before you migrate the metrics (that is, run the Frontline Advisor Database Transfer migration option before you run the Frontline Advisor Metrics migration option).

Steps

1. Select the type of database you use in your enterprise.

If you select Oracle, the utility also prompts you for the following information:

- Oracle setup – Select the option that describes your environment:
 - Select the Basic option if you use a single-instance Oracle database.
 - Select the RAC connectivity setup option if you use Oracle RAC.
- Oracle JDBC driver location

Click **Next**.

2. The **Migration Source Database** screen prompts for connection details for the Frontline Advisor database. Enter your information, and click **Next**.
3. The **Migration Target Database** screen prompts for connection details for the Platform database. Enter your information, and click **Next**.
4. The **Database Schema Names** screen prompts for the name of the source database schema that you are migrating (that is, the FA database schema), as well as the name of the target database schema (the schema in the Platform database) to which you are migrating.

Enter your information, and click **Next**. The **Installation Progress** screen displays.
5. If required, check the details you have entered by clicking the **Show Details** button. When the details are correct, click **Install** to proceed with the migration.
6. When the migration is complete, review the log for errors or warnings.

Procedure: Migrating Stat Server-Adapter Relationships from the Platform Database to Configuration Server

Purpose:

To migrate the existing Stat Server-AGA relationships from the Platform database to the Genesys Configuration Server. The migration utility's **Export Stat Server Config to Config Server** option performs the migration operation for all configured adapters in a single pass. Applicable for first-time migrations to release 8.5.2 only.

If you do not use the migration utility to migrate the Stat Server-AGA relationships to the Configuration Server, then you must manually configure the Stat Server connections and the Stat Server types using a Genesys configuration interface, such as Genesys Administrator. You might choose to perform this migration manually for security reasons, for example.

Prerequisites

- Be sure to run the **Export Stat Server Config to Config Server** option after migrating to release 8.5.2, but before you start any of the adapters.

Steps

1. Select the **Export Stat Server Config to Config Server** option and run the utility. Run the export option only once. The export option on the migration utility performs the following actions:
 - Adds configured Stat Servers as connections on the adapter Application object.
 - Configures backup Stat Servers based on redundancy links configured on the primary Stat Server Application object (where a backup Stat Server is configured).
 - Sets the supported Stat Server types on the **Annex** tab of both the primary and backup Stat Server Application objects.
2. Adjust the ADDP properties for your environment, if required. For more information, see [Next Steps](#), below.

Next Steps

The migration utility does not migrate the ADDP properties from the existing adapter configuration. Instead, on the adapter Application object, the utility turns on the ADDP connection mode and sets the default values for an ADDP connection. The default ADDP connection timeout values for Stat Server connections are the following:

- Remote timeout: 300 seconds
- Local timeout: 120 seconds

If you use something other than default values for ADDP connections between adapters and Stat Servers, then you must manually reconfigure those values after you export the Stat Server configuration to the Configuration Server using the migration utility.