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Genesys Pulse Migration

Migrate to 8.5.108, 8.5.107, 8.5.106, 8.5.105, or 8.5.104.04

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Migrate to 8.5.108, 8.5.107, 8.5.106, 8.5.105, or 8.5.104.04

This page provides the standard Deployment Procedure for migrating to Pulse 8.5.108.xx, 8.5.107.xx, 8.5.106.xx, 8.5.105.xx or 8.5.104.04.xx.

Important

Pulse requires a staged migration. Review the [available migration paths for your release](#).

Migrate from 8.5.103.xx or higher

To deploy this package, do the following:

- To deploy this installation package within a new environment, follow the instructions in the [Genesys Pulse Deployment Guide](#).
- To install this release of Pulse over the prior release, use this Deployment Procedure and refer to the [Genesys Pulse Deployment Guide](#) as needed.
- For migration from release 8.5.103.xx only: The HA configuration is updated, so you must make configuration changes. For a load-balanced environment configuration with two GAX applications and Pulse plug-ins, associate all GAX instances to all primary Collector instances.

Notes:

- Review all steps before performing any of them.
- Plan a time when you can complete the installation in one continuous session.
- This procedure is valid only for Genesys Administrator Extension (GAX) and Pulse installed with jetty.

Installation Steps

1. Stop GAX.
2. Uninstall Pulse.
3. **Important!** For migration from release 8.5.103.xx only: Delete all of the following files if they exist in either the <GAX dir>/plug-ins or <GAX dir>/webapp/WEB-INF/lib folders:
 - jackson-annotations-2.6.0.jar
 - jackson-core-2.6.0.jar

- jackson-databind-2.6.0.jar
- 4. Ensure that protobuf-java-2.5.0.jar, pulse.jar, pulse-impl.jar, and pulse-proto.jar, do not exist in the <GAX_dir>/plug-ins and <GAX_dir>/webapp/WEB-INF/lib folders.
- 5. Start GAX.
- 6. In GAX, upload the Pulse Installation Package and Template:
 - a. Navigate to **Administration > Installation Packages** and click the plus sign.
 - b. Select **Installation Package Upload (template uploaded separately)** and click **Next**.
 - i. For **Upload a Package**, select the zipped file that contains the Pulse Installation Package (for example, \Pulse\version\linux\b1\ip, which has the Installation Package description file).
 - ii. For **Upload an XML template**, select the XML Template file (for example, Pulse.xml from the Templates Installation Package directory).
 - iii. For **Upload an APD template**, select the APD Template file (for example, Pulse.apd from the Templates Installation Package directory).
 - c. Click **Finish**.
- 7. Deploy the Pulse Installation Package and Template:
 - a. Click the **Pulse Installation Package** to open the **Properties** tab.

Important

The Pulse Installation Package status should be complete.

- b. Click the related icon and choose **Install** to open the IP Deployment Wizard.
- c. Enter details in the required fields and finish the installation.

Important

The **IPCommon InstallPath** should be an empty folder for the Pulse installation (for example C:\genesys\GCTI\Pulse8.5.1).

- 8. For a High Availability (HA) deployment repeat steps 1-4 and 7 for a second GAX.
- 9. Update options of statserver with new statistical type definitions:
 - a. Back up the StatServer configuration options to a file:
 - i. In GAX, navigate to **Configuration > Environment > Applications**.
 - ii. Select the **StatServer** Application object.
 - iii. Open the **Application Options** tab.
 - iv. Click **More**.
 - v. Choose **Export** to save the file.

- b. Optionally, update options inside the pulse_statistics.cfg file from the scripts folder to a particular social media that is configured in eServices solution (for example, facebook, twitter, facebooksession, facebookprivatemessage). See [eServices documentation](#) for more details.
- c. In Stat Server **Application Options** remove sections Average_Handle_Time, Average_Hold_Time, Continuous_Login_Time, Utilization, Total_Calls_Outbound, Total_Calls_Internal, CallsAnswered, CurrAgentsLoggedIn, CurrNumberWaitingCalls, Total_Calls_Abandoned, CurrAvgCallWaitingTime, and Total_Queue_Wait_Time. These stattype definitions were changed and you have to remove old sections to create new ones.
- d. Import the pulse_statistics.cfg file from the scripts folder to the Stat Server **Application Options** to create new stattypes within both the primary and backup Stat Server Application objects.

Tip

In the first step of this file import uncheck **Override**.

Important

To calculate the % Ready Time in the Queue KPIs template, set the queue-use-pseudo-actions option in the [statserver] section of Stat ServerApplication object to false.

- e. After the pulse_statistics.cfg file is imported, restart the Stat Server application.
 - f. (Optional) To prevent Pulse from updating the Genesys-provided templates to release 8.5 when Pulse starts, create the new option **install_templates** with its value set to **false** in the **[pulse]** section of the GAX Application object. If you also want the ability to remove any template using Pulse, create the option **editable_templates** with its value set to **true**. See the Configuration Options in the [Genesys Pulse Deployment Guide](#) for details.
10. Stop Pulse Collector.
 11. Uninstall Pulse Collector.
 12. Back up the Pulse Collector configuration options to a file:
 - a. In GAX, navigate to **Configuration > Environment > Applications**.
 - b. Select the Pulse Collector Application object.
 - c. Open the **Application Options** tab.
 - d. Click **More**.
 - e. Choose **Export** to save the file.
 13. In GAX, upload the Pulse Collector Installation Package and Template:
 - a. In GAX, navigate to **Administration > Installation Packages** and Click the plus sign.
 - b. Select Installation Package Upload (template uploaded separately) and click Next.
 - i. For **Upload a Package**, select the zipped file that contains the Pulse Collector Installation Package (for example, \PulseCol\version\linux\b1\ip, which has the Installation Package description file).
 - ii. For **Upload an XML template**, select the XML Template file (Collector.xml from the

Templates Installation Package directory).

- iii. For **Upload an APD template**, select the APD Template file (Collector.apd from Templates Installation Package directory).

c. Click **Finish**.

14. Deploy the Pulse Collector Installation Package and Template:

Tip

You can also install Genesys Pulse Collector directly on the server by executing the Genesys Pulse Collector installation procedure from the Genesys Pulse Collector installation package, then uploading the Genesys Pulse Collector template (Collector.apd) using Configuration Manager.

- a. Click the **Pulse Collector Installation Package** to open the **Properties** tab.

Important

The Pulse Collector Installation Package status should be complete.

- b. Click the related icon and choose **Install** to open the IP Deployment Wizard.
- c. After the host selection, enter the Pulse Collector application name from the previous release as the application name and finish the installation.

Important

The InstallPath should point to an empty folder.

15. Update the Pulse Collector Application options:

- a. In GAX navigate to **Configuration > Environment > Application Templates**.
- b. Select the new Pulse Collector 8.5.1 Application Template.
- c. Open the **Application Options** tab.
- d. Click **More**.
- e. Select **Export** to save the file with the Pulse Collector 8.5.1 Template options.
- f. Navigate to **Configuration > Environment > Applications**.
- g. Open the **Properties** of the Pulse Collector Application object.
- h. Open the **Application Options** tab.
- i. Click **More**.
- j. Select **Import** and select the file you saved with the Pulse Collector Template options.
- k. Check **Override**.

- l. Apply the changes.
 - m. If required, update the new options according to recommendations in the *Genesys Pulse Deployment Guide*. Also, you can use the backup file of the previous Pulse Collector configuration options as a guide of what to change.
16. Stop GAX
17. In the Pulse installation folder, open the scripts folder to select and execute the upgrade script to the version for your RDBMS while logged in as Pulse DB owner.
 - For migration from releases 8.5.103.xx or 8.5.104.01 to releases 8.5.104.04 through 8.5.105:
 - a. Select and execute version 08.5.104.04 (for example, pulse_upgrade_08.5.104.04_postgres.sql for PostgreSQL).
 - For migration to releases 8.5.108.xx, 8.5.107.xx, and 8.5.106.xx only:
 - a. (Optional) For migration from releases 8.5.103.xx or 8.5.104.01, first select and execute version 08.5.104.04 of the script (for example pulse_upgrade_08.5.104.04_postgres.sql for PostgreSQL) while logged in as Pulse DB owner.
 - b. Select and execute version 08.5.106.00 of the script (for example, pulse_upgrade_08.5.106.00_postgres.sql for PostgreSQL) while logged in as Pulse DB owner.
18. Start GAX.
19. Start Collector.
20. All users must clear their browser cache.

You have successfully completed your deployment of Pulse.

Migrate from 8.5.102, 8.5.101, 8.5.100, 8.5.010, or 8.5.000

To deploy this package, do the following:

- To deploy this installation package within a new environment, follow the instructions in the [Genesys Pulse Deployment Guide](#).
- To install this release of Pulse over the prior release, use this Deployment Procedure and refer to the [Genesys Pulse Deployment Guide](#) as needed.

Notes:

- Backup your Pulse database and Configuration Server database before starting.
- This is two-phase migration, review all steps before performing any of them.
- Plan a time when you can complete the installation in one continuous session.
- This procedure is valid only for Genesys Administrator Extension (GAX) and Pulse installed with jetty.
- After migration to this release of Pulse, historical data collected during the previous day is lost, which prevents Pulse from loading the line charts until new data is available. After Collector starts, Pulse can display historical data after the first new snapshot is created. This impacts line charts.

- After migration, the Default Dashboard for each tenant is converted to shared dashboard available for All users from any tenant. Such dashboards have names like **Default Dashboard '<Tenant Name>'** where <Tenant Name> is a name of tenant where this default dashboard was stored. You can set permissions for dashboards after migration.
- All empty dashboards or dashboards with all removed widgets (the message **Widget Removed** is shown before migration) are removed during migration.

Important

There are files named pulse_upgrade_08.5.104.04_<database_name>.sql—They are not used in this migration.

Installation Steps

1. Stop both Pulse Collector and GAX.
2. Uninstall Pulse and Pulse Collector.
3. Upgrade GAX. See the [GAX upgrade procedure](#).

Important

The GAX upgrade procedure contains options that you must use to enable Pulse migration:

- Retain the existing GAX Application object for use with Pulse 8.5.
- Do not retain Pulse files from a previous version.

4. Remove Pulse files (pulse.jar, pulse-proto.jar, protobuf-java-2.5.0.jar) from <GAX installation folder>/plug-ins directory.
5. Start GAX.
6. In GAX, upload the Pulse Installation Package and Template:
 - a. Navigate to **Administration > Installation Packages** and click the plus sign.
 - b. Select **Installation Package Upload (template uploaded separately)** and click **Next**.
 - i. For **Upload a Package**, select the zipped file that contains the Pulse Installation Package, which contains the ip_description.xml file as well as setup.exe on the root level.
 - ii. For **Upload an XML template**, select the XML Template file Pulse.xml from the Templates Installation Package directory.
 - iii. For **Upload an APD template**, select the APD Template file Pulse.apd from the Templates Installation Package directory.
 - c. Click **Finish**.
7. Deploy the Pulse Installation Package and Template:

- a. Click the **Pulse Installation Package** to open the **Properties** tab.

Important

The Pulse Installation Package status should be complete.

- b. Click the related icon and choose **Install** to open the IP Deployment Wizard.
- c. Enter details in the required fields and finish the installation.

Important

The **IPCommon InstallPath** should be an empty folder for the Pulse installation (for example C:\genesys\GCTI\Pulse8.5.010).

8. For a High Availability (HA) deployment repeat steps 1 through 5, and 7 for a second GAX. In step 7, you must select a second GAX server.
9. Update options of statserver with new statistical type definitions:
 - a. Back up the StatServer configuration options to a file:
 - i. In GAX, navigate to **Configuration > Environment > Applications**.
 - ii. Select the **StatServer** Application object.
 - iii. Open the **Application Options** tab.
 - iv. Click **More**.
 - v. Choose **Export** to save the file.
 - b. Optionally, update options inside the pulse_statistics.cfg file from the scripts folder to a particular social media that is configured in eServices solution (for example, facebook, twitter, facebooksession, facebookprivatemessage). See [eServices documentation](#) for more details.
 - c. In Stat Server **Application Options** remove sections Average_Handle_Time, Average_Hold_Time, Continuous_Login_Time, Utilization, Total_Calls_Outbound, Total_Calls_Internal, CallsAnswered, CurrAgentsLoggedIn, CurrNumberWaitingCalls, Total_Calls_Abandoned, CurrAvgCallWaitingTime, and Total_Queue_Wait_Time. These stattype definitions were changed and you have to remove old sections to create new ones.
 - d. Import the pulse_statistics.cfg file from the scripts folder to the Stat Server **Application Options** to create new stattypes within both the primary and backup Stat Server Application objects.

Tip

In the first step of this file import uncheck **Override**.

Important

To calculate the % Ready Time in the Queue KPIs template, set the queue-use-pseudo-actions option in the [statserv] section of Stat ServerApplication object to false.

- e. After the pulse_statistics.cfg file is imported, restart the Stat Server application.
 - f. (Optional) To prevent Pulse from updating the Genesys-provided templates to release 8.5 when Pulse starts, create the new option **install_templates** with its value set to **false** in the **[pulse]** section of the GAX Application object. If you also want the ability to remove any template using Pulse, create the option **editable_templates** with its value set to **true**. See the Configuration Options in the [Genesys Pulse Deployment Guide](#) for details.
10. Back up the Pulse Collector configuration options to a file:
 - a. In GAX, navigate to **Configuration > Environment > Applications**.
 - b. Select the Pulse Collector Application object.
 - c. Open the **Application Options** tab.
 - d. Click **More**.
 - e. Choose **Export** to save the file.
 11. In GAX, upload the Pulse Collector Installation Package and Template:
 - a. In GAX, navigate to **Administration > Installation Packages** and Click the plus sign.
 - b. Select Installation Package Upload (template uploaded separately) and click Next.
 - i. For **Upload a Package**, select the zipped file that contains the Pulse Collector Installation Package (for example, \PulseCol\version\linux\b1\ip, which has the Installation Package description file).
 - ii. For **Upload an XML template**, select the XML Template file (Collector.xml from the Templates Installation Package directory).
 - iii. For **Upload an APD template**, select the APD Template file (Collector.apd from Templates Installation Package directory).
 - c. Click **Finish**.
 12. Deploy the Pulse Collector Installation Package and Template:

Tip

You can also install Genesys Pulse Collector directly on the server by executing the Genesys Pulse Collector installation procedure from the Genesys Pulse Collector installation package, then uploading the Genesys Pulse Collector template (Collector.apd) using Configuration Manager.

- a. Click the **Pulse Collector Installation Package** to open the **Properties** tab.

Important

The Pulse Collector Installation Package status should be complete.

- b. Click the related icon and choose **Install** to open the IP Deployment Wizard.
- c. After the host selection, enter the Pulse Collector application name from the **previous** release as the application name and finish the installation.

Important

The InstallPath should point to an empty folder

13. Update the Pulse Collector Application options:

- a. In GAX navigate to **Configuration > Environment > Application Templates**.
- b. Select the new Pulse Collector Application Template.
- c. Open the **Application Options** tab.
- d. Click **More**.
- e. Select **Export** to save the file with the Pulse Collector Template options.
- f. Navigate to **Configuration > Environment > Applications**.
- g. Open the **Properties** of the Pulse Collector Application object.
- h. Open the **Application Options** tab.
- i. Click **More**.
- j. Select **Import** and select the file you saved with the Pulse Collector Template options.
- k. Check **Override**.
- l. Apply the changes.
- m. If required, update the new options according to recommendations in the *Genesys Pulse Deployment Guide*. Also, you can use the backup file of the Pulse Collector configuration options as a guide of what to change.

14. Stop GAX.

15. For migration from 8.5.000 only:

- a. In the Pulse installation folder, open the **scripts** folder to select the upgrade script to version **08.5.001.02** for your RDBMS (for example **pulse_upgrade_08.5.001.02_postgres.sql** for PostgreSQL)
- b. Execute the upgrade SQL script on your Pulse DB schema.
- c. From the Pulse installation folder, within the **dbtool** folder, create the configuration file **migration_8.5.102.cfg** using the sample provided:

```
db.type=<dbtype>
db.url=<url for connection to db>
```

```
db.user=<database username>
db.password=<database password>
config_server.host=<configuration server host>
config_server.port=<configuration server port>
config_server.username=<username to connect to configuration server>
config_server.password=<password to connect to configuration server>
```

- d. From the command line, run: 'migration_8.5.102.bat -m' on Windows or './migration_8.5.102.sh -m' on Linux
16. In the Pulse installation folder, open the **scripts** folder to select the upgrade script to version **08.5.002.00** for your RDBMS (for example **pulse_upgrade_08.5.002.00_postgres.sql** for PostgreSQL)
17. Execute the upgrade SQL script on your Pulse DB schema.
18. From the Pulse installation folder, within the **dbtool** folder, create the configuration file **dbtool.cfg** using the sample provided:

```
db.type=<dbtype>
db.url=<url for connection to db>
db.user=<database username>
db.password=<database password>
config_server.host=<configuration server host>
config_server.port=<configuration server port>
config_server.username=<username to connect to configuration server>
config_server.password=<password to connect to configuration server>
```
19. From the command line, run: 'dbtool.bat -m' on Windows or './dbtool.sh -m' on Linux
20. For migration to releases 8.5.108, 8.5.107, and 8.5.106 only:
 - a. In the Pulse installation folder, open the scripts folder to select the upgrade script to the version 08.5.106.00 for your RDBMS (for example pulse_upgrade_08.5.106.00_postgres.sql for PostgreSQL).
 - b. Execute the script on your Pulse DB schema (while logged in as Pulse DB owner).
21. Start GAX.
22. **Optional:** When the user used for migration has no rights to edit Role objects:
 - a. Review migration log (saved in **dbtool/log** folder)
 - b. Find List of roles in the end of log that should be updated manually
 - c. Manually edit all these roles through GAX:
 - i. In the current moment, GAX shows two sets of privileges with the same names, they are different only in **Since Version**. Need to check privilege with the same name as already checked.
 - ii. If role has the "Pulse View Dashboard" or "Pulse View Dashboard Restricted" privilege, then check the **Pulse Manage Tabs** privilege.
 - iii. If role has "Pulse Manage Templates" privilege, then check "Pulse Manage Shared Tabs" privilege.
23. **Optional:** Clean up old privileges:
 - a. From the Pulse installation folder, within the **dbtool** folder, append the configuration file **dbtool.cfg** with the next sample:

```
gax.url=http://GAX server host>:<GAX server port>/gax
gax.username=<username for login to GAX server>
gax.password=<password for login to GAX server>
```

Migrate to 8.5.108, 8.5.107, 8.5.106, 8.5.105, or 8.5.104.04

b. From the command line, run: 'dbtool -up <path to Pulse.xml file from the Templates Installation Package directory>'

24. **Optional:** In order to set permissions for dashboards, you need to clone them with **Save to configuration server** option and then remove original. See [Pulse Help](#).

25. Start Pulse Collector.

26. All users must clear their browser cache.

You have successfully completed your deployment of Pulse.