Genesys Pulse Migration

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12/19/2025

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Genesys Pulse is a Genesys application that enables at-a-glance views of real-time contact center statistics within the graphical user interface.

> ### Important
> You must deploy matching 5-digit releases of Genesys Pulse and Genesys Pulse Collector.

To deploy this installation package within a new environment, follow the instructions in the Genesys Pulse Deployment Guide. Otherwise, follow the Upgrade to 9.0 from 8.5.

Upgrade from 9.0.000 - 9.0.003 to later releases of 9.0

1. Make sure that your environment satisfies Software Requirements.
2. **Optional:** Backup all Genesys Pulse Extensions jar files from the `<Pulse dir>/plug-ins` directory if they were previously installed.
3. Backup `pulse.properties` from the `<Pulse dir>/conf` folder.
4. Stop Genesys Pulse.
5. Uninstall Genesys Pulse.
6. Install new version of Genesys Pulse:
   1. Copy the Genesys Pulse IP to the Genesys Pulse host.
   2. Run the `setup.exe` (Windows) or `install.sh` (Linux) installation file.
   3. Follow the installation prompts to install Genesys Pulse.
7. **Optional:** Restore all Genesys Pulse Extensions jar files to the `<Pulse dir>/plug-ins` directory if they were installed previously.
8. Restore the `pulse.properties` file to the `<Pulse dir>/conf` folder.
9. In the Genesys Pulse installation folder, open the scripts folder to select the upgrade script to version 09.0.004.00 for your RDBMS (for example, `pulse_upgrade_09.0.004.00_postgres` for PostgreSQL). Execute the upgrade SQL script on your Genesys Pulse DB schema.
10. **For the upgrade from release 9.0.002.02 or earlier**, update Stat Server options with new statistical type definitions:
    1. Back up Stat Server configuration options to a file:
       - In GAX, navigate to `Configuration > Environment > Applications`.

- Select the Stat Server Application object.

- Open the Application Options tab.

- Click More.

- Choose Export to save the file.

2. Import the cfg file from the scripts folder to the Stat Server Application Options to create new stat types within both the primary and backup Stat Server Application objects. Uncheck Override option during the import.

3. After the cfg file is imported, restart the Stat Server application.

11. Stop all Genesys Pulse Collectors.

12. Uninstall all Genesys Pulse Collectors.

13. Install the new version of Genesys Pulse Collector:

   1. Copy the Genesys Pulse Collector IP to the Genesys Pulse Collector host.

   2. Run the setup.exe (Windows) or install.sh (Linux) installation file.

   3. Follow the installation prompts to install Genesys Pulse Collector, choose an existing Genesys Pulse Collector application object and install to an empty folder.

   4. Repeat for each Genesys Pulse Collector Application object.

Important

Starting with release 9.0.005, support of the external DB Server in DAP for Genesys Pulse Collector is deprecated. Configure Genesys Pulse Collector with an embedded DB Server instead.

14. **Optional:** If needed, install the latest available Genesys Pulse Language Packs according to Deploy Language Packs.

15. Start Genesys Pulse.

16. Start Genesys Pulse Collectors.

Upgrade from 8.5 to 9.0

1. Make sure that your environment satisfies Software Requirements.

2. Stop GAX.

3. Uninstall Genesys Pulse.

4. Ensure that the pulse.jar, pulse-eml.jar, and pulse-proto.jar files do not exist in the <GAX dir>/plug-ins and <GAX dir>/webapp/WEB-INF/lib folders.

5. Start GAX.

6. Proceed with the regular Genesys Pulse installation until the step of the SQL script execution before starting Genesys Pulse.

7. Copy all Genesys Pulse Extensions jar files from the `<GAX dir>/plug-ins` to `<Pulse dir>/plug-ins` directory if they were installed previously.

8. Make sure that the new Genesys Pulse application specifies connections to Genesys Pulse Collector objects.

9. Copy the **[pulse]** section with all options from GAX application to the new Genesys Pulse application:

    1. In GAX, navigate to `Configuration > Environment > Applications`.

    2. Select the GAX Application object.

    3. Open the `Application Options` tab.

    4. Click **More**.

    5. Choose **Export** to save the file. In the file delete all sections except **[pulse]**.

    6. Select the Genesys Pulse Application object.

    7. Open the `Application Options` tab.

    8. Click **More**.

    9. Choose **Import**.

    10. Select the previously prepared file.

    11. Click **Upload**.

10. **Optional:** For proper links between GAX and Genesys Pulse do the following:

    1. Copy the `link-to-pulse.jar` file located in the Genesys Pulse installation folder to `<GAX dir>/plug-ins` and `<GAX dir>/webapp/WEB-INF/lib` folders.

    2. In GAX, navigate to `Configuration > Environment > Applications`.

    3. Select the GAX Application object.

    4. Open the `Application Options` tab.

    5. Create the new **[link-to-pulse]** section.

    6. Configure the **$default** option in the **[link-to-pulse]** section of your GAX application with the URL to Genesys Pulse as the value. See Genesys Pulse Configuration Options for more details.

    7. Save application.

    8. Select the Genesys Pulse Application object.

    9. Open the `Application Options` tab.

    10. Create the new **[link-to-gax]** section.

    11. Configure the **$default** option in the **[link-to-gax]** section of your Genesys Pulse application with the URL to GAX as the value. See Genesys Pulse Configuration Options for more details.

    12. Save application.

    13. Restart GAX.

11. Add GAX application to connections of the new Genesys Pulse application.

12. Repeat previous steps for each GAX application.

13. Check and update the **jdbc_url** option (if configured) in your Database Access Point (DAP), associated with the Genesys Pulse application. Make sure to follow the format described in the Data Access Point

Application Object.

14. **For the upgrade from release 8.5.107 or earlier** update Stat Server options with new statistical type definitions:

    1. Back up the Stat Server configuration options to a file:
       In GAX, navigate to `Configuration > Environment > Applications`.
       Select the Stat Server `Application` object.
       Open the `Application Options` tab.
       Click More.
       Choose Export to save the file.

    2. 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.

    3. In Stat Server **Application Options** remove 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 sections. These stattype definitions were changed and you have to remove old sections to create new ones.

    4. 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 Server `Application` object to false.**

    5. After the `pulse_statistics.cfg` file is imported, restart the Stat Server application.

    6. (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 Pulse 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.

15. Stop all Genesys Pulse Collectors.

16. Uninstall all Genesys Pulse Collectors.

17. Back up the Genesys Pulse Collector configuration options for each Genesys Pulse Collector to a file:

    1. In GAX, navigate to `Configuration > Environment > Applications`.

    2. Select the Genesys Pulse Collector `Application` object.

    3. Open the **Application Options** tab.

    4. Click **More**.

  5. Choose **Export** to save the file.

18. In GAX, upload the Pulse Collector Installation Template:

  1. In GAX, go to `Environment > Application Templates > New`

  2. Click `Import Application Template` and upload the APD Template file (the `Collector.apd` file from the Templates Installation Package directory).

  3. (Optional) Click `Import Metadata` and upload XML Template file (the `Collector.xml` file from the Templates Installation Package directory).

  4. Click Save.

19. Install Genesys Pulse Collector:

  1. Copy the Genesys Pulse Collector IP to the Genesys Pulse Collector host.

  2. Run the `setup.exe` (Windows) or `install.sh` (Linux) installation file.

  3. Follow the installation prompts to install Genesys Pulse Collector, choose an existing Genesys Pulse Collector application object and install to an empty folder.

  4. Repeat for each Genesys Pulse Collector Application object.

20. Update the Genesys Pulse Collector Application options:

  1. In GAX navigate to `Configuration > Environment > Application Templates`.

  2. Select the new Pulse Collector Application Template.

  3. Open the **Application Options** tab.

  4. Click **More**.

  5. Select **Export** to save the file with the Genesys Pulse Collector Template options.

  6. Navigate to `Configuration > Environment > Applications`.

  7. Open the **Properties** of the Pulse Collector Application object.

  8. Open the **Application Options** tab.

  9. Click **More**.

  10. Select **Import** and select the file you saved with the Genesys Pulse Collector Template options.

  11. Check **Override**.

  12. Apply the changes.

  13. If required, update the new options according to recommendations in the *Genesys Pulse Deployment Guide*. Also, you can use the backup file of the Genesys Pulse Collector configuration options as a guide of what to change.

  14. Repeat those steps for each Genesys Pulse Collector `Application` object.

21. **Only for migration from 8.5.000**:

  1. In the Genesys 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).

  2. Execute the upgrade SQL script on your Genesys Pulse DB schema.

  3. From the Genesys 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>

4. From the command line, run: 'migration_8.5.102.bat -m' on Windows or './migration_8.5.102.sh -m' on Linux

22. **Only for migration from 8.5.102 or earlier**:

1. In the Genesys 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).

2. Execute the upgrade SQL script on your Genesys Pulse DB schema.

3. From the Genesys 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>

- application.id=<Genesys Pulse Application ID> — Required if two or more Genesys Pulse applications use the same Genesys Pulse Database. The application ID can be found in the APPLICATION_KEY column of the WBRT_APPLICATION table.

Important
All Genesys Pulse instances that connect to the same Genesys Pulse Database must be upgraded and dbtool should be run against each Genesys Pulse Application ID.

4. From the command line, run: dbtool.bat -m on Windows or ./dbtool.sh -m on Linux

5. **Optional**: When the user used for migration has no rights to edit Role objects:

- Review migration log (saved in the dbtool/log folder).

- Find List of roles in the end of log that should be updated manually.

- Manually edit all these roles through GAX:
    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.
    If role has the Pulse View Dashboard or Pulse View Dashboard Restricted privilege, then check the Pulse Manage Tabs privilege.
    If role has the Pulse Manage Templates privilege, then check the Pulse Manage Shared Tabs privilege.

6. **Optional**: Clean up old privileges:

    - From the Genesys Pulse installation folder, within the dbtool folder, append the `dbtool.cfg` configuration file with the following 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>`

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

23. **Only for migration from 8.5.105 or earlier**:

    1. In the Genesys Pulse installation folder, open the scripts folder to select the upgrade script to version 08.5.106.00 for your RDBMS (for example, `pulse_upgrade_08.5.106.00_postgres.sql` for PostgreSQL).

    2. Execute the upgrade SQL script on your Genesys Pulse DB schema.

24. In the Genesys Pulse installation folder, open the scripts folder to select the upgrade script to version 09.0.000.00 for your RDBMS (for example, `pulse_upgrade_09.0.000.00_postgres.sql` for PostgreSQL).

25. Execute the upgrade SQL script on your Genesys Pulse DB schema.

26. From the Genesys 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>`

    - `application.id=<Genesys Pulse Application ID>` — Required if two or more Genesys Pulse applications use the same Genesys Pulse Database. The application ID can be found in the APPLICATION_KEY column of the WBRT_APPLICATION table.

    ## Important
    All Genesys Pulse instances that connect to the same Genesys Pulse Database must be upgraded and `dbtool` should be run against each Genesys Pulse Application ID.

27. From the command line, run: `dbtool.bat -m900` on Windows or `./dbtool.sh -m900` on Linux.

28. Start Genesys Pulse.

29. Start Genesys Pulse Collectors.

30. Check that Genesys Pulse is working.

31. Remove the old GAX application from connection of the Genesys Pulse `Application` object.

32. Remove all Genesys Pulse Collectors and Genesys Pulse DAP applications from connections of all GAX `Application` objects.

33. Restart Genesys Pulse.

34. **Optional**: If needed, install the latest available Genesys Pulse Language Packs according to Deploy Language Packs.

35. **Optional**: In order to set permissions for dashboards, you need to clone them with the **Save to configuration server** option and then remove original. See Genesys Pulse Help.

36. Start Genesys Pulse Collectors.

37. All users must clear their browser cache.