Genesys Administrator Extension Deployment Guide

Upgrading GAX

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Upgrading GAX

This page describes how to upgrade GAX from previous versions to the current version. Before you begin, it is recommended that you review Setting Up Genesys Administrator Extension to learn more about prerequisites, supported browsers, and other useful upgrade information.

To begin, open the tab that applies to your system.

> **Important**
>
> Genesys Administrator Extension uses an embedded instance of Jetty for web-server functions, whereas previous releases have used Tomcat. The upgrade procedures below explain how to upgrade GAX to use Jetty. To continue using Tomcat, you must remove the old **<Tomcat Home>/webapps/gax** folder and copy the new **gax.war** file from the GAX installation folder to the **<Tomcat Home>/webapps** folder.

Upgrading GAX (Management Framework 8.1.1 or higher)

1. Stop the instance of GAX that you want to upgrade.
2. Ensure that Management Framework, Configuration Server, and Genesys Administrator are all upgraded to versions that are compatible with the latest version of GAX before proceeding (refer to Prerequisites for Genesys Administrator Extension Modules).
3. Click the option below that describes your GAX environment. You can skip this step if your GAX Application object type is **Genesys Administrator Server** and you do not intend to use the Pulse 8.5 plug-in.
   '''[+] Click here if your GAX Application object is of type '''Genesys Generic Server'''

   Create and configure the configuration objects that are required for the latest version of GAX by using Genesys Administrator to perform the following steps:

   a. Open your existing GAX Application object of type **Genesys Generic Server** in edit mode.
   b. Click the **Options** tab.
   c. Click **Export** to save your configured GAX options to a file on your local file system of type **CONF/CFG**.
   d. Create and configure a new Server Application object for Genesys Administrator Extension of type Genesys Administrator Server.
      i. Ensure that you follow the steps that pertain to the use of Configuration Server 8.1.1, or higher.
      ii. Replicate any configuration that you wish to add to your newly created Application object by referring to the GAX Application object of your previous version.
      iii. Click the **Options** tab.
      iv. Click **Import** and specify the **CONF/CFG** file that you previously created. Select **No** to not overwrite any existing options.

v. (Optional) Create a DAP that points to the Log Database. Set the role of the DAP to auditing. Enable auditing by setting the value of the **[general].auditing** option to **true**. Add the DAP to your GAX connections. On the **Options** tab of the DAP, in the **GAX** section, configure the **role** option with the value **auditing**.

'''[+] Click here if you intend to use the Pulse 8.5 plug-in'''

You must reuse the existing GAX Application object if you intend to migrate to Pulse 8.5. To do so, use Genesys Administrator to perform the steps below:

a. Upload the GAX 8.5 Application Template. Download the Genesys Administrator Help for additional instructions on how to upload Application Templates.

b. Open the GAX 8.5 Application Template object.

c. Click the **Options** tab.

d. Click **Export** to save your configured GAX options to a file on your local file system of type **CONF/CFG**.

e. Close the GAX 8.5 Application Template.

f. Open your existing GAX Application object.

g. Click the **Options** tab.

h. Click **Import** and specify the **CONF/CFG** file that you previously created from the GAX 8.5 Application Template. Select **No** to not overwrite any existing options.

i. Click **Save & Close**.

4. Go to the GAX folder and back up the **webapp** folder by renaming it to **webapp_backup**.
5. On the target machine, run the GAX installer for the release to which you want to upgrade. The installer copies the binary file and all of the required files to the target directory.
6. Execute all applicable database upgrade scripts, if necessary. To determine if you have to apply any database scripts:

   a. Execute the following SQL statement on your existing GAX database: `select * from db_schema_version`.

   b. Compare the result with the update scripts in the **resources/sql_scripts** folder in the target directory of the installation.

> ## Important
>
> The latest database schema versions are:
>
> - core—8.5.260.11
> - asd—8.5.000.01
> - opm-arm—8.1.301.01
>
> Examples of upgrade scripts for Solution Deployment:
>
> - (Oracle only) **gax_asd_upgrade_db_8.1.320.01_to_8.5.000.01_ora.sql**
> - (Microsoft SQL only)

gax_asd_upgrade_db_8.1.320.01_to_8.5.000.01_mssql.sql

- (PostgreSQL only)
  gax_asd_upgrade_db_8.1.320.01_to_8.5.000.01_postgres.sql

If you do not have the latest database schema versions, execute the scripts in the following order:
-1- Core
-2- Automatic Solution Deployment

-3- Operational Parameter Management

- As a local user on the host machine, whether in person or via a remote desktop connection, launch GAX and run Setup Mode.
- (Optional) You can delete the previous GAX Application object after you have verified that the new release is working correctly.
- To use the System Dashboard feature, you must set up a connection to Solution Control Server (SCS).
- (Optional) If you backed up the **webapp** folder in Step 4 to **webapp_backup**, you must perform the following actions:

  a. Stop GAX.

  b. Copy the plug-in .jar files from **webapp_backup** to the new **webapp** folder in the GAX 9.0.* installation folder.

  c. Delete the **webapp_backup** folder.

  d. Start GAX.

Important

- Some plug-ins might require additional configuration. Refer to the plug-in documentation for more information about installing and configuring the plug-in.
- You must upload the plug-in installation package into GAX if the plug-in contains new privileges.
- If you are migrating from Tomcat to Jetty, you might need to update the paths used in the **asd** configuration options if they refer to the **{CATALINA_HOME}** variable that was previously used by Tomcat.

Upgrading GAX (Management Framework 8.1.0 or Lower)

> **Important**
>
> Refer to the Known Issues section of the Management Framework Release Notes for information about using Management Framework versions prior to the 8.1.0 release.

1. Stop the instance of GAX that you intend to upgrade.
2. (Optional) Complete this step if you intend to migrate an earlier version of Pulse to Pulse 8.5. You must reuse the existing GAX Application object if you intend to migrate to Pulse 8.5. To do so, use Genesys Administrator to perform the steps below:
   a. Upload the GAX 8.5 Application Template. Download Genesys Administrator Help for additional instructions on how to upload Application Templates.
   b. Open the GAX 8.5 Application Template object.
   c. Click the **Options** tab.
   d. Click **Export** to save your configured GAX options to a file on your local file system of type **CONF/CFG**.
   e. Close the GAX 8.5 Application Template.
   f. Open your existing GAX Application object.
   g. Click the **Options** tab.
   h. Click **Import** and specify the **CONF/CFG** file that you previously created from the GAX 8.5 Application Template. Select **No** to not overwrite any existing options.
   i. Click **Save & Close**.
3. (Optional) If you want to retain the installed plug-ins that you used with GAX 8.1.4, go to the GAX folder and back up the **webapp** folder by renaming it to **webapp_backup**.
4. On the target machine, run the GAX installer for the release to which you want to upgrade. The installer copies the binary file to the target directory that was defined during installation, and also copies all of the required files to the target directory.
5. Execute all applicable database upgrade scripts, if necessary. To determine if you have to apply any database scripts:
   a. Execute the following SQL statement on your existing GAX database: `select * from db_schema_version`.
   b. Compare the result with the update scripts in the **resources/sql_scripts** folder in the target directory of the installation.

   > **Important**
   >
   > The latest database schema versions are:
   >
   > - core—8.5.260.11
   > - asd—8.5.000.01
   > - opm-arm—8.1.301.01

Examples of upgrade scripts for Solution Deployment:

- (Oracle only) **gax_asd_upgrade_db_8.1.320.01_to_8.5.000.01_ora.sql**
- (Microsoft SQL only) **gax_asd_upgrade_db_8.1.320.01_to_8.5.000.01_mssql.sql**
- (PostgreSQL only) **gax_asd_upgrade_db_8.1.320.01_to_8.5.000.01_postgres.sql**

If you do not have the latest database schema versions, execute the scripts in the following order:
-1- Core
-2- Automatic Solution Deployment

-3- Operational Parameter Management

- As a local user on the host machine, whether in person or via a remote desktop connection, launch GAX and run Setup Mode. Follow the instructions in the procedure Deploy GAX Using Setup Mode (Existing Deployment).
- (Optional) You can delete the previous GAX Application object after you have verified that the new release is working correctly; however, you can choose to maintain both versions simultaneously.
- To use the System Dashboard feature, you must set up a connection to Solution Control Server (SCS). Refer to the procedure "Add_SCS_Connection" in step 5 of Deploying Genesys Administrator Extension via Setup Mode for more information.
- If you backed up the **webapp** folder in Step 4 to **webapp_backup**, you must perform the following actions:

  a. Stop GAX.

  b. Copy the plug-in .jar files from **webapp_backup** to the new **webapp** folder in the GAX 9.0.* installation folder.

  c. Delete the **webapp_backup** folder.

  d. Start GAX.

Important

- Some plug-ins might require additional configuration. Refer to the plug-in documentation for more information about installing and configuring the plug-in.
- You must upload the plug-in installation package into GAX if the plug-in contains new privileges.
- If you are migrating from Tomcat to Jetty, you might need to update the paths used in the **asd** configuration options if they refer to the **{CATALINA_HOME}** variable that was previously used by Tomcat.

Important

- Role privileges must be renewed if the application type is changed. Genesys stores role privileges that are associated with the application type to which they apply, but since GAX is associated with **Genesys Administrator Server** in 8.1.1 releases of Management Framework (for GAX 8.1.2 and higher), not **Genesys Generic Server**, the role privileges must be set using the correct type.
- Database upgrade scripts that have version numbers prior to the ones from which you upgraded do not have to be executed. You must log in to the database schema as a GAX user and run the commands inside the SQL scripts as commands for the database.
- If you are installing GAX for the first time or upgrading from previous releases, when you execute the SQL upgrade scripts, make sure that the scripts are properly committed. If your client application has auto-commit switched off, you might have to add the following line(s) to the scripts:
  - For Oracle: **commit;**
  - For MS SQL: **BEGIN TRANSACTION;COMMIT TRANSACTION;**
  - For PostgreSQL: **commit;**