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Migration

Genesys Rules System 8.5.1

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Welcome

Use these topics to find migration information for the 8.5.x and 8.1.x releases of Genesys Rules System.

Important

To perform migration steps, you should have a full set of GRS **role permissions**.

- **8.5.x Migration**
- **8.1.x Migration**

8.5.x Migration

8.5.303

Migration is as for 8.5.3 from 8.5.2 subject to the following important points:

Important

- Business node access is required to view entries in package history generated after this release. The **Rule Package History - Admin View** privilege is required in order to override the new access check mechanism to view the previous package history.
- The **Changed By** column in Package History was previously accessible without a role privilege, but in release 8.5.303, users require a new role privilege—**Rule Package History - View Changed By**—to view this column.

Migration to 8.5.3 from 8.5.2

1. Undeploy the 8.5.2 .war file from your application server.

Important

Do not just copy the 8.5.3 .war file over the 8.5.2 .war file in your application server directory. Genesys recommends undeploying the previous file first and letting the application server clean up its files, then deploying the new .war file.

2. Upgrade your application server to use Java 8—see below.
3. Deploy the 8.5.3 .war file to your application server.
4. Set the values of any of the new **configuration options**.
5. Log into 8.5.3 Genesys Rules Authoring Server.

8.5.302.04 Requirements

8.5.302.04 requires Genesys Administrator 8.1.305.04 (minimum) to support GRAT's new RBAC features.

Java 8 Support

GRS 8.5.3 is now on the Java 8 platform. Java 8 gives improved performance and security over Java 7. GRS takes advantage of some of the new features in Java 8 to give you a more robust platform.

Since GRS 8.5.3 has been built on Java 8, it will no longer execute on the Java 7 platform. Therefore, your application servers will have to be reconfigured to use Java 8.

For Tomcat users

1. Download and install the **Java SE Runtime Environment 8** from Oracle.
2. Download and install the latest Tomcat 8 or 8.5 distribution (GRS does not currently support Tomcat 9).
3. During the installation, choose the Java 8 SDK location when prompted.
4. Set the appropriate memory settings. You can find recommendations for performance tuning [here](#). You may need to adjust these depending upon your deployment.

Important

There is no longer a **permgen** setting for Java 8.

5. Deploy the 8.5.3 GRAT or GRE **.war** file.

For WebSphere Users

Currently, IBM only supports Java 8 on the WebSphere Liberty distribution. For configuration information for WebSphere Liberty click [here](#).

A/B/C Split Testing Feature Template

A new template ships with GRS 8.5.3—**GRSSplitTest_template.xml**—and this provides some basic Facts (Conditions and Actions) for the Split Testing feature. To implement the feature, GRAT users must import this template (from the **Samples** folder) and attach it to all rules packages for which the Split Test functionality is required.

Important

The new template—**GRSSplitTest_template.xml**—is shipped with type **samples**. This means it can only be added to rule packages of type **samples**, because GRAT only shows templates in the list with compatible types. To use this template with other rule package types, you can import the template from GRAT into GRDT, change the name (for example, **GRSSplitTestForMyType**) and the type (to match your rule package type) and publish it to GRAT. Then you can use it with another package type.

Migration to 8.5.2 from 8.5.1

Warning

During migration, the format of DRL files in GRE's `deployed-rules-directory` will be changed from `.drl` to `.di`, so Genesys recommends backup of `.drl` files before migrating GRE to 8.5.2

1. Undeploy the 8.5.1 `.war` file from your application server.

Important

Do not just copy the 8.5.2 `.war` file over the 8.5.1 `.war` file in your application server directory. Genesys recommends undeploying the previous file first and letting the application server clean up its files, then deploying the new `.war` file.

2. Deploy the 8.5.2 `.war` file to your application server.
3. Set the values of any of the [configuration options](#).
4. Log into 8.5.2 Genesys Rules Authoring Server.

Using the 8.5.2 Clustering Improvements

If you want to take advantage of the clustering improvements in release 8.5.2, you must import the "smart application" template, as follows;

From Genesys Administrator

1. Navigate to **Application Templates**.
2. Click **Upload Templates** (upper right corner).
3. Choose the `.apd` file `Genesys_Rules_Engine_Application_Cluster_852.apd`.
4. Click **Save** and **Close**.
5. Go to **Applications**.
6. Create a **New** application.
7. For the template, choose the application template that you just created in steps 1-4.
8. Fill in the mandatory fields, including the host (which is not used, but GA requires you to complete this field).
9. In the **Connections** section, add each GRE in the cluster.
10. On the **Options** tab, configure the three auto-synch options (see [GRE Configuration options](#)):
 - auto-synch-rules

- auto-synch-rules-interval
- auto-synch-rules-at-startup

See also **Cluster Improvements for Cloud**.

Migration to 8.5.1 from 8.5.001

1. Undeploy the 8.5.001 .war file from your application server.

Important

Do not just copy the 8.5.1 .war file over the 8.5.001 .war file in your application server directory. Genesys recommends undeploying the previous file first and letting the application server clean up its files, then deploying the new .war file.

2. Deploy the 8.5.1 .war file to your application server.
3. Set the values of any of the new **configuration options**.
4. Log into 8.5.1 Genesys Rules Authoring Server.

Migration to 8.5.001 from 8.5.0

1. Undeploy the 8.5.0 .war file from your application server.

Important

Do not just copy the 8.5.0001 .war file over the 8.5.0 .war file in your application server directory. Genesys recommends undeploying the previous file first and letting the application server clean up its files, then deploying the new .war file.

2. Deploy the 8.5.0001 .war file to your application server.
3. Set the values of any of the new **configuration options**.
4. Log into 8.5.0001 Genesys Rules Authoring Server.

Migration to 8.5.0/8.5.001

From 8.1.4

1. Undeploy the 8.1.4 .war file from your application server.

Important

Do not just copy the 8.5.0 .war file over the 8.1.4 .war file in your application server directory. Genesys recommends undeploying the previous file first and letting the application server clean up its files, then deploying the new .war file.

2. Deploy the 8.5.0 .war file to your application server.

Important

If you have a very large repository database, it may take several minutes the first time you deploy the 8.5.0 .war file, as GRAT must rebuild the index cache. Once this process is complete, the user will be able to log in to the system.

3. Log into 8.5.0 Genesys Rules Authoring Server.

From 8.1.3

1. In 8.1.4, the repository database configuration was moved to a Database Access Point (DAP). Create and configure a DAP and add it as a connection to the GRAT application object. You will no longer be prompted for database configuration information during the installation process.

See the following procedures for details of how to create a DAP:

- **Creating the Rules Repository Database using Configuration Server**
 - **Creating the Rules Repository Database using Genesys Administrator**
- Undeploy the 8.1.3 .war file from your application server.

Important

Do not just copy the 8.5.0 .war file over the 8.1.3 .war file in your application server directory. Genesys recommends undeploying the previous file first and letting the

application server clean up its files, then deploying the new .war file.

- Deploy the 8.5.0 .war file to your application server.

Important

If you have a very large repository database, it may take several minutes the first time you deploy the 8.5.0 .war file, as GRAT must rebuild the index cache. Once this process is complete, the user will be able to log in to the system.

- Log into 8.5.0 Genesys Rules Authoring Server.

From 8.1.2 and 8.1.1

1. From the 8.1.1 or 8.1.2 Genesys Rules Authoring Server:
 - a. Click on each tenant and export the templates associated with that tenant as an XML file.
 - b. Click on each rule package that you wish to migrate and export as an XML file.
3. Create a new database for GRAT 8.5.0 (leaving the old one in place).
4. Install 8.5.0 Genesys Rules System.
5. Start 8.5.0 Genesys Rules Authoring Server. This creates the tables inside the new database.
6. Log into 8.5.0 Genesys Rules Authoring Server.
7. For each tenant, import the template XML file (from step 1a).
8. For each tenant, and under each solution, click on New Rule Package and import the corresponding rule package XML file (click the Auto-save option).
9. Redeploy each rule package to the corresponding 8.5.0 Genesys Rules Engine(s).
10. Optionally, from the Genesys Rules Deployment Tool, you may import the templates from the 8.5.0 Genesys Rules Authoring Server.

See the GRAT online Help for explicit steps for **importing** and **exporting** templates, and **importing** and **exporting** rules packages.

Important

Running an 8.5.0 Rules Authoring Server against an 8.1.2 repository will result in a corrupted repository that will no longer be useable by any version of the Rules Authoring Server.

Repository Performance Enhancement for Oracle 11 users

For Oracle users, a performance enhancement is available that is enabled only when you create a new database repository when either initially installing, or migrating to, 8.5.x. For a new installation with a new Oracle database repository, no additional steps are required. If you are migrating to GRS release 8.5.x from an earlier release, to take advantage of the enhancement, do the following:

1. Click on each tenant and export the templates associated with that tenant as an XML file.
2. Click on each rule package that you wish to migrate and export as an XML file.
3. Create a new database for GRAT 8.5.x.
4. Start 8.5.x Genesys Rules Authoring Server.

With the enhancement, when GRAT initializes, it creates new database tables based on a new optimized schema, and database performance is improved.

Important

If you re-use your existing 8.1.3/8.1.4 repositories, GRAT does not re-create the tables with the new schema. In this scenario, there is no performance enhancement.

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