GVP Migration Guide Pages

Genesys Voice Platform 9.0.x

1/5/2022

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Migrating to GVP 9.0

9.x This version of the Migration Guide applies to Genesys Voice Platform that is part of 9.0, starting with version 8.5. For version 8.1 of Genesys Voice Platform, see the Genesys Voice Platform home page.

- Changes
- Preparations
- Procedures

Notes:

- This guide covers migration only—not installation, not configuration and not maintenance. For those procedures, see the corresponding sections of the Genesys 8.5 Deployment Guide.
- This document concerns GVP 8.5 only. Consult the Genesys Migration Guide about migrating to earlier versions.

Changes in GVP 8.5

For information about earlier releases of GVP, see the section "Genesys Voice Platform 8.x Migration" of the Genesys Migration Guide.

Read about changes to each GVP version:

[+] New in 8.5.1

New in 8.5.1

[+] New in 8.5.0

New in 8.5.0

Read about changes to each GVP component:

- GVP 8.5.x Release Notes
- Media Server 8.5.x Release Notes

Read about documentation corrections in the GVP 8.5 Documentation Supplement.

Read the sections **New in this Release** and **Document Change History** in each of these books:

- GVP 8.5 Deployment Guide
- GVP 8.5 User's Guide
- Genesys Media Server 8.5 Deployment Guide

Read about changes to the Reporting Server database schema:

- 8.5.0 release: no changes to the schema.
- 8.5.1 release: no changes to the schema.

Note that the Reporting Server database schema and installation package (IP) always have the same release number.

Preparing to Migrate to GVP 8.5

Preliminary Steps

The migration process includes the following preliminary steps for GVP 8.5:

1. Review the *Migration Roadmap* chapter of the Genesys Migration Guide.
2. Note the order in which the required Genesys software that is required for GVP 8.x should be upgraded. See Order of Migration.
3. Examine the component changes for GVP. See Changes in GVP 8.5.0.
   - The tables describe changes that directly affect the migration of this version.

   For complete information about what s new in the 8.5.x releases of GVP and how these releases function, see the Genesys Media Server 8.5 Deployment Guide. For a complete list of documentation relevant to the migration of this product, see "Reference Materials" a few paragraphs below.
4. Review the licensing requirements. Although GVP has no licensing requirements, there may be licensing requirements for associated products in the deployment, such as third-party speech engines or other Genesys components. For more information about Genesys licensing requirements, see the information about licensing migration in the Licensing Migration chapter of the Genesys Migration Guide.
5. Check the interoperability of the components of GVP 8.x during the upgrade procedures. See Interoperability Among Components.
6. Ensure that you have the required permissions to execute commands for GVP components in Genesys Administrator.

Reference

- GVP 8.5 Deployment Guide
- GVP 8.5 User's Guide
- GVP 8.5 Configuration Options Reference
- GVP 8.1 Troubleshooting Guide
- Media Server 8.5 Deployment Guide
- Media Server Configuration Options Reference
- GVP 8.1 Application Migration Guide
- VP Solution 8.1 Integration Guide

Order of Migration

The information in this section is specific to the application processes and components that enable or support all GVP 8.x releases.

Migrate or upgrade this GVP solution—including application components, other enabling software, and relevant data—in the following order:

Procedure: Prepare to Migrate to GVP 8.x

Prerequisites

- Present on your system: an installed version of GVP that is earlier than the version being installed.

Steps

1. [+] Migrate Management Framework

This update may not be mandatory. Consult the Genesys Interoperability Guide. However, Management Framework is the foundation for all Genesys products, solutions, and options.

Genesys highly recommends upgrading these Management Framework components before you install GVP. Refer to the table below for information on correct GVP version and component:

If migrating to this GVP version:	You need the Management Framework version of:	
Genesys Administrator	**Configuration Server**	
8.5.1	8.1.3	8.1.3
8.5.0	8.1.3	8.1.3
8.1.7	8.1.3	8.1.3

For information about migrating the layers and components of Management Framework, see the Framework Migration part of this guide.

If you plan to upgrade Configuration Server, Genesys recommends that you first back up its configuration to an XML file.

2. [+] Upgrade other prerequisite Genesys components

Upgrade other prerequisite Genesys components (such as SIP Server, Composer), if required. Consult the Genesys Interoperability Guide.

When upgrading many components, determine if the first component you upgrade is backward compatible with the GVP components that have not been upgraded, yet. See at Genesys Interoperability Guide and the Genesys Supported Operating Environment Reference Guide.

3. [+] Back up the Configuration Layer

If you plan to upgrade Configuration Server, Genesys recommends that you first back up the Configuration Layer to an XML file. To do this:

a. Open the command console by selecting **Start > Run**, and then entering `cmd`.

b. Navigate to the Configuration Server directory for example:
`cd C:\Progam Files\GCTI\Multitenant Configuration Server`

c. Execute the following command to export the configuration: `confserv.exe -export <filename.xml>`

> **Tip**
>
> If you are required to rollback to the original configuration after attempting the migration, you can use the `confserv.exe –import <filename.xml> -user <account> -password <password>` command to import `<filename.xml>` back into the Configuration Server directory. IVR Profile configurations are captured in the exported XML file. The `<filename.xml>` file is created in the same folder as the `confserv.exe` file. This is a useful backup, although it is not necessary to modify the IVR Profiles in any way to migrate to GVP 8.5.x.

4. [+] Back up GVP Application configurations

Back up the configurations of the existing GVP 8.x component Application objects.

5. [+] Update the Contact Center

You may need to update the contact center configuration; it must reflect changes in Place Groups, Agent Groups, and DNs, for example.

6. [+] Migrate GVP

This is a summary. See fully described and detailed steps in the procedure Steps to Migrate to GVP 8.5.x.

a. Stop GVP. (Hot migration is not supported.)

b. Uninstall the existing GVP 8.x components.

c. Create and configure new GVP 8.x Application objects, and install the GVP Applications on their hosts.

FYI:

- Installing the the Media Control Platform also creates a shared directory...
  Windows: `C:\var\www\gvp\mcp`
  Linux: `/var/www/gvp/mcp`
- Windows automatically creates a virtual directory named `mcp` on the Internet Information Service (IIS) Web Server; it is really a pointer to the shared directory.

- For Linux, you must create the virtual directory manually following the Post-Installation Configuration of GVP Components: procedures in the GVP 8.5 Deployment Guide.
- Starting in version 8.1.4, the installation of the IIS web server is no longer required, because the ASR grammar that is hosted on the web server prior to 8.1.4 is now sent to the ASR engine as inline-grammar in the MRCP request. However, if the `[mpc]inlinegrammar_by_url configuration` option is set to `true` (default is `falseINSERT_TEXT`), the pre-8.1.4 behavior is restored and the user must set up the virtual directory correctly for speech recognition to work properly.

7. [+] Migrate the Reporting Server Database

1. Back up (always), then upgrade the database (only if needed). See Migrating the Reporting Server Databases.

8. [+] Verify the Installation

Start the newly installed version of GVP, and verify its proper operation by checking its log for errors.

Considerations for Multi-Tenant Migrations

GVP supports Hierarchical Multi-Tenancy (HMT) starting with release 8.1.2, enabling you to migrate your existing 7.6 multi-tenant configuration. The GVP 8.5 HMT model does not strictly replicate the GVP 7.6 model, however; there are many new features to enhance and simplify the way that multiple tenants are created, configured, and managed.

> **Tip**
> GVP and Genesys Administrator provide tools and wizards to facilitate migration.

This section discusses the six main aspects of migration to GVP: Tenant Hierarchy; Logical Resource Groups; DID Groups, DIDs, and IVR Profiles; Policies and Port Assignments; Speech Resource Management; and Server Data Retention Policies.

Tenant Hierarchy

Each GVP 8.1.2 (and later) tenant object, other than the default or root tenant, uses the parent TenantDBID to reference its parent tenant object. The root tenant resides at the top of the hierarchy and serves as the parent tenant. The root tenant is named Environment by default, but any name can be configured. All child tenants are created under the root or Environment tenant.

You can use the Bulk Tenant Wizard to migrate your existing hierarchy, which is described in the section "Migrating Your Existing Multi-Tenant Environment" in the Genesys Migration Guide. For more

information about how to create and configure tenants in HMT, see Genesys Administrator 8.0.3 Help.

Logical Resource Groups

Beginning with GVP 8.1.x, Resource Groups represent groupings of resources that share common properties, such as, service type (i.e., voicexml), capabilities (i.e., support for a specific VoiceXML grammar), and method of load balancing (i.e., round-robin). They are an important element of resource management and essential for multi-tenant environment where specific resources and services may not be allocated to all tenants.

Unless you are migrating from GVP 8.1.1, there is no resource group data to migrate. Resource Groups did not exist in GVP 8.1.0 and earlier 8.x versions. For information about how to create Resource Groups, see the GVP 8.5 Deployment Guide.

How the LRGMT Migrates Legacy Resource Groups

The Logical Resource Group Migration Tool (LRGMT) is an application within Genesys Administrator that is invoked from the operating system's Command Line Console (CLC), and provides diagnostic information directly to the console. The tool accepts command-line arguments, which correspond to the fields in the Genesys Administrator login dialog box, and must be specified in the following order:

- `<username>`
- `<password>`
- `<application>`
- `<host>`
- `<port>`

Upon completion of the migration process, the tool exits without user intervention and provides any error messages to standard error log file.

The tool enumerates all of the resource groups that are in the legacy format and are not Gateway resource groups, and creates new groups by using the Configuration Unit (CU) scheme (Management Framework objects).

Legacy resource groups belong to the Environment tenant by default, therefore, the new resource groups are created under the Environment tenant. When a new resource group is created without errors, the associated legacy resource group is deleted.

To compare resource groups, the tool uses two kinds of information:

- The **virtual IP** that is configured for the Resource Manager Application to which the resource group belongs.
- The **connections** to the Resource Manager Application for the specific resource group.

Based on this comparison, identical pairs of resource groups are considered to belong to a Resource Manager High Availability (HA) pair. The tool creates only one new resource group for these LRGs and assigns the CU to both Resource Manager instances in the HA pair.

DID Groups, DIDs, and IVR Profiles

Direct Inward Dialing (DID) Groups are used to group DID numbers or DID ranges and can have IVR Profiles associated with them. (DIDs were previously referred to as Dialed Numbers [DN]). A child tenant can have more than one DID Group and the tenant owner of a DID Group can assign more than one DID Group to its child tenant. The rules for adding DID ranges to DID Groups remains the same as it did for DNs in previous versions of GVP, except that DIDs must be unique across all tenants rather than the parent tenant only.

Starting in GVP 8.1.4, you can install Policy Server to validate DID Groups and detect overlaps in DID ranges. It provides this information in response to HTTP queries from Genesys Administrator. For information about how Policy Server performs it s functions, see the GVP 8.5 Deployment Guide.

You can use the Bulk Operations Wizard to migrate your existing hierarchy, which is described in the section Procedure to Migrate Multi-Tenant Configurations, found in the chapter Migration Procedures for GVP 7.6 and VG 7.x, in the Genesys Migration Guide. For more information about how to create DID Groups, see the GVP 8.5 Deployment Guide or Genesys Administrator 8.1 Help.

Policies and Port Assignments

Port levels 1, 2, and 3, previously provisioned at the customer level, can now be provisioned for tenants (at any level of the hierarchy) or for an IVR Profile.

The number of concurrent calls allowed for each port and the affect on system performance remains the same in 8.1.2, however, the values are now configured in the `gvp.policy/usage-limits`, `gvp.policy/level2-burst-limit`, and `gvp.policy/level3-burst-limit` options.

You can install Policy Server to validate and resolve GVP-specific business rules (the policies that are enforced by the Resource Manager). For information about how Policy Server performs it s functions, see the GVP 8.5 Deployment Guide.

You can migrate the maximum ports provisioning data for your 7.6 IVR Profiles to the `gvp.policy/usage-limits` option. Also, if you define the `gvp.policy/level2-burst-limit`, and `gvp.policy/level3-burst-limit` options when creating your IVR Profiles, the functionality is the same as when they are provisioned for a tenant. Open the Genesys Migration Guide and search for "Procedure to Migrate Multi-Tenant Configurations."

> **Tip**
>
> In GVP 8.1.2 and later, the usage-limit, permission, and rule-based policies are checked using top-down methodology. While the way in which the usage-limit and rule-based policies are checked is transparent to the user, it is important to note that if you are migrating IVR Profiles with permission policies (for example, conference-allowed) that are defined in both the profile and tenant, the IVR Profile will not be checked in the new 8.1.2 hierarchy before the tenant (bottom-up). In other words, the profile-defined permissions could be overridden by the tenant-defined permissions.

For more information about how GVP 8.1.2 and later supports policies and port provisioning in HMT, see the GVP 8.5 Deployment Guide.

Speech Resource Management

Starting in GVP 8.1.4, you can install the MRCP Proxy to manages access and routing to your MRCPv1 resources. The MRCP Proxy can route requests to the supported resources, provide round-robin load balancing, and monitors the health status of resources. For information about how the MRCP Proxy performs its functions, see the GVP 8.5 Deployment Guide.

Reporting Server Data Retention Policies

After you have installed the Reporting Server, you can use the Data Retention Policy Wizard to configure four categories of tenants and IVR Profile data retention policies CDR, Operation Reporting, VAR, and Service Quality.

For information about how to use the Data Retention Policy Wizard, see the GVP 8.5 User's Guide.

Interoperability Among Components

The term interoperable means that different versions of Genesys solutions, components, or options can work together during the migration process.

Interoperability of Genesys products can occur at two levels of migration:

- Interoperability at the suite level means combining different releases of solutions and options during the migration process.
  Example: You can migrate to the Management Layer of Framework 8.0.1 while still using 7.x or 8.0 components. For information about suite-level interoperability, see the Genesys Interoperability Guide.
- Interoperability at the solution level means combining different releases of the components of a particular solution while upgrading them sequentially during the migration process.

The mixture of components may include the executable files, applications, routing strategies, scripts, and data that make up a particular solution.

As you upgrade each of the components in sequence, you will need to know whether it is backward-compatible with the other components of GVP.

Example: If you have four components to upgrade, determine whether the first component you upgrade to release 8.1 will be backward-compatible with the three 8.0 components you have not yet upgraded.

Migration Procedures for GVP 8.5

Refer the appropriate sections of the Genesys Migration Guide for information about migrating Management Framework and other Genesys solutions.

Assorted Notes about Migration

Assorted Notes About Migration to GVP 8.5

Read all the topics in this section first.

- 64-Bit Installation Packages: GVP 8.1.5 and above support 64-bit operating systems (Windows and Linux) running 64-bit processes. If you plan to migrate to the 64-bit installation packages (IPs) from GVP 8.1.4 or older, you must perform a fresh installation of all IPs. You cannot migrate the 32-bit IPs to 64-bit.
- For optimal performance, Genesys recommends that you use 64-bit IPs on 64-bit operating systems.
- Installing the the Media Control Platform also creates a shared directory:
  `C:\var\www\gvp\mcp` in Windows
  `/var/www/gvp/mcp` in Linux.
- Windows automatically creates a virtual directory named `mcp` on the Internet Information Service (IIS) Web Server; it is really a pointer to the shared directory.
- For Linux, you must create the virtual directory manually following the Post-Installation Configuration of GVP Components: procedures in the GVP 8.5 Deployment Guide.
- Starting with GVP 8.1.4, installing the IIS web server is no longer required, because the ASR grammar that is hosted on the web server prior to 8.1.4 is now sent to the ASR engine as inline-grammar in the MRCP request. However, if the `[mpc]inlinegrammar_by_url configuration` option is set to `true` (default is `false`), the pre-8.1.4 behavior is restored and the user must set up the virtual directory correctly for speech recognition to work properly.

Steps to Migrate to GVP 8.5

Steps to Migrate to GVP 8.5

Complete the following steps to migrate from GVP 8.x to GVP 8.5.x, on both Linux and Windows operating systems.

1.[+] Back Up the Configuration

Back up your configurations of the GVP 8.x component application objects.

Note:	You may already have backed up the whole Configuration Layer as part of the Management Framework migration (Part 2 in Genesys Migration Guide). However, Genesys recommends backing up the GVP components individually—to help reinstate customized configuration options later.

2.[+] Stop GVP Processes

Follow these steps in Genesys Administrator, for each application:

a. Go to `Provisioning > Environment > Applications >` and select the application.

b. In the Tasks panel, select **Stop application gracefully**.

c. In the confirmation dialog box, click **OK**. All Application processes in the GVP solution are shut down gracefully.
Note: Graceful shutdown means that no new calls will be accepted, and the system will wait as long as necessary for the last call to finish before it shuts down the processes.

d. Wait until the status displayed in Genesys Administrator shows that the applications have been stopped.

For more information about stopping GVP processes, see the GVP 8.5 Deployment Guide or the Genesys Administrator 8.1 Help.

3.[+] Uninstall GVP 8.x

Follow these steps for each GVP 8.5 application, using Genesys Administrator:

a. On the Provisioning tab, select **Environment > Applications**.

b. Double-click the component application you want to uninstall.

c. When the Configuration tab appears, select **Uninstall** in the toolbar.

d. When the Confirm dialog box appears, click **Yes**.

The component application is uninstalled, but it is not deleted from the Configuration Database; therefore, it still appears in the applications list in Genesys Administrator.

> **Tip**
> In general, Genesys recommends that you uninstall components in reverse order of dependency, or in reverse order of installation, although this is not strictly required for GVP. In addition, the servers should be restarted after the components are uninstalled.

4.[+] Create and Install 8.5.x Applications

In Genesys Administrator, create and install the applications for the GVP configuration objects: See Interoperability Among Components for the list of components in each GVP 8.x release. There are four ways to create and install the applications:

Import IPs

a. Use the Installation Packages Import Wizard to import all the GVP installation packages (IPs) to the Genesys Administrator Repository.

b. Use the Installation Wizard to install the IPs.
You can install the applications with default settings, and then go back later to reinstate customized configuration options.

Reuse existing 8.5.x Applications

a. For each component, load the configuration templates and apply them to the existing applications, regardless of whether they are new or reused.

b. Modify the server connections in the Connections section of the Configuration tab, and modify the values of configuration options on the Options tab, if required.

c. To determine if the configuration has changed from the default settings, export the options from the template and from the Application.

d. Use a comparison tool to generate a list of differences. After the new component has been upgraded, manually apply the changes to the newly created Application.

e. Use the Installation Wizard to install the IP on the GVP host.

Create New Applications Using Templates

a. Create a new 8.1.x Application Template for each component and import the metadata.

b. Make a copy of the existing 8.0 Application and apply the 8.1.x Application Template to the new copy.

c. Modify the server connections in the Connections section of the Configuration tab, and modify the values of configuration options on the Options tab, if required.

d. Use the Installation Wizard to install the IP on the GVP host.

Create New Applications Individually

a. Using the Create Application Wizard, create the new applications individually and import the 8.1.x

Application Templates and their metadata at the same time.

b. Modify the server connections in the Connections section of the Configuration tab, and modify the values of configuration options on the Options tab, if required.

c. Use the Installation Wizard to install the IP on the GVP host.

For more information about the methods for creating and installing GVP applications, see the GVP 8.5 Deployment Guide. For the new configuration options that were introduced in GVP 8.1, see Interoperability Among Components.

5.[+] Migrate the Resource Groups

Migrate and provision your existing GVP 8.1.x resource groups, by using the Logical Resource Group Migration Tool (LRGMT) in Genesys Administrator:

a. From the operating system s Command Line Console (CLC), enter: `lrgmt <username> <password> <application> <MF host> <MF port>`
where

- `<username>` is the username of the Environment (or root) tenant.
- `<password>` is the password of the Environment (or root) tenant.
- `<application>` is the name of the Genesys Administrator application, for example, default.
- `<MF host>` is the host name of the Management Framework Server that is hosting Genesys Administrator.
- `<MF port>` is the Management Framework Server port number, 2020.

b. Press **Enter**.

No other action is required. The LRGMT progress information is displayed within the CLC, as well as error information in a standard error format, which can be redirected to an error or log file. For more information about how legacy Resource Groups are migrated, see Logical Resource Groups.

To create new resource groups, use the Resource Group Wizard in Genesys Administrator. For more information about creating the resource groups, see the GVP 8.5 Deployment Guide.

Load the GVP 8.5.x Management Information Bases (MIBs) into your Simple Network Management Protocol (SNMP) management console.

6.[+] Verify the Configuration

a. Follow these steps to export the new configuration file for each Application object in your existing GVP deployment:

i. In Genesys Administrator, go to the `Provisioning > Environment > Applications > <GVP Application> > Options` tab.

ii. On the toolbar, click **Export**.

iii. In the dialog box, select a file format for the export (`.cfg` or `.xml`).

iv. In the File Download dialog box, click **Save**, and select a location for the configuration file.

b. In the command console, execute the following command to compare the new configuration file to the old one:
   - On Windows, enter: `fc <old cfg file> <new cfg file>`
   - On Linux, enter: `diff <old cfg file> <new cfg file>`

c. Based on the result, go to the Options tab of the applicable Application objects and modify the configuration, as required.

d. To ensure that you retain the built-in audio files that your deployment uses for DTMF tones and for prompts, back up the files in the `<MCP installation path>/audio` directory and subdirectories.

7.[+] Upgrade the Reporting Server Database

Migrate the Reporting Server database, if needed. See Migrating Reporting Server Databases.

8.[+] Back Up and Modify the Database

Optional: After upgrading, you may choose to run a script that corrects a START_TIME index issue.

> **Important**
>
> This action deletes all MCP event logs, Custom Var data and VAR CDRs from your database! Back up the data first. See Migrating the Reporting Server Databases.

9.[+] Start GVP 8.5.x

a. If you did not clear the cookie cache of your browser after you upgraded to the current version of Genesys Administrator, delete cookies now. Otherwise, GVP reports may not work.

b. Start the GVP 8.x components. You can start the components in any order, however, you must start the RDBMS server for the Reporting Server database before you start the Reporting Server itself.

   GVP 8.5.x components are installed as Windows Services and can be configured to start automatically. For more information about starting and stopping GVP, see the GVP 8.5 Deployment Guide.

c. Verify proper operation of GVP 8.5.x by checking the logs for errors.

   GVP migration is effectively a new installation, therefore, you might encounter issues similar to the usual setup and startup problems for new installations. The most likely areas to check are successful database upgrade and successful importation of the old configuration. For more information about the errors you may encounter, see the GVP 8.1 Troubleshooting Guide.

d. If the upgrade of any component fails, recreate and reinstall it, or roll back to GVP 8.1. For more information, see Rollback Procedures.

Migrating Without Service Interruption

Follow these steps to migrate GVP without service interruption.

Notes:

- The Resource Manager must be deployed in either active-active or active-standby HA mode for this procedure to be completed successfully.
- Genesys recommends that you execute the steps in the following procedure during low call traffic periods only.

1.[+] Back Up the Configuration

Back up the GVP 8.x Application objects.
For each GVP Application object in your existing GVP 8.x deployment, using Genesys Administrator:

a. Go to the Provisioning > Environment > Applications > *GVP Application* > Options tab.

b. On the toolbar, click **Export**.

c. In the dialog box, select the `export` format. The options are to export as a `.cfg` file or as an `.xml` file.

d. In the File Download dialog box, click **Save**, and then save the configuration file to a convenient location.

e. To ensure that you retain the built-in audio files that your deployment uses for DTMF tones and for prompts, back up the files in the <MCP installation path>/audio directory and subdirectories.

2.[+] Upgrade the Reporting Servers

If the Reporting Server is *not* running in High Availability (HA) mode, perform the first three steps (a, b, and c) only. If the Reporting Server *is* running in HA mode, then complete all of the steps:

a. Use a graceful shutdown to stop the standby Reporting Server, as described in "Stop GVP Processes" (step 2 of Steps to Migrate to GVP 8.5.0).

b. Uninstall the Reporting Server in Genesys Administrator, as described in "Uninstall GVP 8.x" (step 3 of Steps to Migrate to GVP 8.5.0).

c. In Genesys Administrator, create and install the Reporting Server Application, as described in "Create and Install 8.5.x Applications" (step 4 of Steps to Migrate to GVP 8.5.0).
Note: Do not restart the standby Reporting Server.

d. Use a graceful shutdown to stop the active Reporting Server.

e. Uninstall the Reporting Server. See <onlineblue>Steps b and <onlineblue>c above. **Note:** Call data is not lost while both Reporting Servers are off line because the call handling components retain the data in their buffers.

3.[+] Create the Reporting Server Database

a. Migrate the old database. See Migrating the Reporting Server Databases.
Or, you can create a new database. For more information, see the GVP 8.5 Deployment Guide.

b. Verify that the database connection parameters are configured correctly for the new database.

c. Restart the standby and active Reporting Servers.

Note: If the Reporting Server is not running in HA mode, follow the steps for migrating the active Reporting Server.

4.[+] Upgrade the Resource Manager

a. Upgrade the Resource Manager, starting with the server that is configured as cluster.mymemberid = 1 in the HA cluster:

   i. Use a graceful shutdown to stop the Resource Manager, as described in "Stop GVP Processes" (step 2 of Steps to Migrate to GVP 8.5.0).

   ii. Uninstall the Resource Manager in Genesys Administrator, as described in "Uninstall GVP 8.x" (step 3 of Steps to Migrate to GVP 8.5.0).

   iii. In Genesys Administrator, reinstall the existing Resource Manager Application, as described in "Create and Install 8.5.x Applications" (step 4 of Steps to Migrate to GVP 8.5.0). Use the second option, Reuse Existing 8.5.x Applications.

   iv. Using Genesys Administrator, import the new Application template. A dialog appears to ask whether the you want to overwrite the existing data. Select **No**.

   v. Restart the Resource Manger (`cluster.mymemberid = 1`).

   vi. Wait a few minutes to allow the calls that are in progress to complete. Note: When you reuse the existing Resource Manager Application, you do not have to reassign the Logical Resource Groups (LRG). However, this is not recommended if your the platform has undergone major functional changes. In that case, create a new Resource Manager Application.

b. Check the status of port 5060 to ensure the Resource Manager is fully started:

   - On Windows, open the Command Line Console (CLC) and enter `netstat -n -a | find “5060”`.
   - On Linux, enter `netstat -a | grep 5060`.

   The port should be in the LISTENING state and both the TCP and UDP ports should be allocated.

c. To prevent SIP transaction failures, check port status for 9801 (the port where the cluster heartbeat is detected and where replication occurs):

   - On Windows, open the CLC and enter `netstat -n -a | find “9801”`.
   - On Linux, enter `netstat -a | grep 9801`.

d. Upgrade the other Resource Manger in the HA pair (cluster.mymemberid = 2).

5.[+] Migrate the Resource Groups

Migrate and provision your existing GVP 8.5.x resource groups, by using the Logical Resource Group Migration Tool (LRGMT) in Genesys Administrator.
See "Migrate the Resource Groups" (step 5 of Steps to Migrate to GVP 8.5.0).

6.[+] Upgrade the Media Control Platforms

Upgrade each Media Control Platform application individually.
Follow the same steps that you used to upgrade the Resource Manager in "Upgrade the Resource Manager" (step 4 of this procedure)).

7.[+] Upgrade the Call Control Platforms

Upgrade each Call Control Platform application individually.
Follow the same steps that you used to upgrade the Resource Manager in "Upgrade the Resource Manager" (step 4 of this procedure).

Migrating Reporting Server Databases

This section contains procedures to migrate your Microsoft SQL Server or Oracle Reporting Server database by updating the schema for versions 8.1.7 thru 8.5.1

Notes:

- For SQL server there is no schema change from 8.1.7 to 8.5.x. Hence, there are no upgrade scripts released for SQL server 8.1.7 to 8.5.x.
- For Oracle server there is a minor change in both standard and enterprise scripts from 8.1.7 to 8.5.x. Hence, upgrade scripts have been released for Oracle server standard and enterprise (oracle-schema-upgrade-817-851-std.sql and oracle-schema-upgrade-817-851-partitioned.sql).
- Find procedures for migrating to earlier versions of GVP in the chapter "*Migration Procedures for GVP 8.x*" of the Genesys Migration Guide.

Rollback Procedures

Basic Instructions

If the upgrade of any of the GVP components is unsuccessful, or if you want to roll back to the earlier GVP release, do the following:

1. Stop GVP, or verify that it is stopped.
2. Uninstall the GVP Applications (the version you were migrating to), and then delete them from Genesys Administrator.
3. Reinstall the GVP Applications (the version you were migrating from).
   - If you not only uninstalled the GVP Applications but also deleted them in Genesys Administrator (in other words, they are no longer in the Configuration Database), you must recreate, configure, and install them as you would for new installations, as described in the GVP 8.5 Deployment Guide, except that you must use GVP Application Templates.
   - If you uninstalled the GVP Applications but have not yet deleted them in Genesys Administrator (in other words, they are still in the Configuration Database), run the Installation Wizard to install them, as described in the GVP 8.5 Deployment Guide.
   - If the reason for the rollback relates to Genesys Administrator issues, roll back Genesys Administrator to release 8.1 or 8.0, as described in the Management Framework part of the GVP 8.5 Deployment Guide. Then reinstall the GVP Applications, as described in the GVP 8.5 Deployment Guide.
4. For each component, reinstate any custom configuration you may have lost in the rollback process.
5. Roll back the Reporting Server database schema, and recover the GVP Reporting Server database. Genesys recommends that a qualified DBA perform the database recovery. See the tabs **Microsoft SQL Server Database Rollback** and **Oracle Database Rollback** on this page.
6. Restart the GVP Applications. For startup requirements, see GVP Migration step Start GVP 8.5.0.

> **Tip**
> Consult Professional Services regarding migration of any and all customized Genesys products.

Microsoft SQL Database Rollback

Use this recovery procedure to roll back the Microsoft SQL Server.

1. Use Microsoft SQL Server Management Studio to connect to the Microsoft SQL Server, and log in using SA or the Windows Authentication account.

2. Remove the current Reporting Server database (the version you were migrating to):
   a. Ensure that the name of the database you backed up previously does not exist on the database server.
   b. If you have used the same name for the database that you have just migrated, delete the database:
      i. Right-click the database name and select **Delete**.
      ii. In the Delete Object dialog, check Close existing connections and click **OK**. The Databases tree no longer shows the deleted database.
3. Restore the Reporting Server database (the version you were migrating from):
   a. In the Management Studio Object Explorer window, right-click Databases, and select Restore database.
   b. In the section, Specify the source and location of backup sets to restore, click the **From** device radio button.
   c. At the end of the From device field, click the (**...**) browse button.
   d. When the Specify Backup dialog appears, click **Add**.
   e. When the File selection dialog appears, browse to the backup file.
   f. Click **OK** twice to confirm and save the settings.
4. In the Restore database dialog, select **Restore** for the backup sets you selected in Step 3, and click **OK**.
5. When the restore process is successfully completed and the confirmation dialog box appears, click **OK**.

Oracle Database Rollback

The procedure to rollback the Oracle database should be performed by a qualified database administrator (DBA). Visit the Oracle web site for more information about database recovery and rollback procedures. Genesys recommends you obtain version-appropriate reference material from these Google searches:

- Oracle Database Backup and Recovery Basics
- Oracle Database Backup and Recovery Advanced User's Guide

If you find this material to be too complex, use the following procedure as a guideline to backup and restore the database schema.

> **Warning**
> The following steps are intended to present concepts and are not the actual commands to rollback the Oracle database. A qualified DBA should be familiar with the guidelines presented here and be able to determine how they relate to the actual commands to rollback your Oracle database to the original configuration.

1. **Back up** (or export) the schema:

Run these commands from a system console:

- Windows: `C:\oracle\product\10.2.0\db_1\BIN>exp userid=system/password file=rs_8xx.dmp log=rs_8xx_exp.log owner=reporting`
- Linux: `$ORACLE_HOME/bin/exp userid=system/password file=rs_8xx.dmp log=rs_8xx_exp.log owner=reporting`

2. **Connect** to the Oracle database as SYSDBA, using any SQL client.
   a. Delete the RS user named: `reporting`.
   b. Using the same default values for tablespace, temp tablespace, role, and privileges: recreate the RS user by using the same name: `reporting`.
3. **Restore** the schema.
   Run this import command from a system console:
   - Windows: `C:\oracle\product\10.2.0\db_1\BIN>imp userid=system/password file=rs_8xx.dmp log=rs_8xx_imp.log fromuser=reporting`
   - Linux: `$ORACLE_HOME/bin/imp userid=system/password file=rs_8xx.dmp log=rs_8xx_imp.log`

How to Measure Success

- The rollback completes with no errors in the console window output.
- The Reporting Server starts with no errors in the RS log.

> **Tip**
> In this procedure, the `rs_8xx.dmp` and `rs_8xx.imp.log` filenames represent the versions you are backing up and restoring. For example, if you are backing up the 8.1.1 schema, then the filenames would be `rs_811.dmp` and `rs_811.imp.log`.