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Performance Management Advisors Migration Guide

Object Migration Utility

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Contents

- 1 Object Migration Utility
 - 1.1 Migration Paths
 - 1.2 Object Migration Procedures

Object Migration Utility

The Advisors Object Migration Utility is packaged with the Advisors Platform distribution. Use the Advisors Object Migration Utility when you first install Advisors in an environment with a new Configuration Server or when you move an existing Advisors installation to a new Configuration Server.

If any of the required Business Attributes folders that Advisors components use are not already present in the Configuration Server, then the Advisors Object Migration Utility creates those folders and populates them with the following:

- Advisors metrics that exist in the Platform database, including all custom metrics, if any.
- Advisors hierarchy objects if they exist in the Platform database. Starting with Advisors release 9.0.001.06, a brand new Platform database contains a set of Advisors default hierarchy objects that must be added to the Configuration Server to make the automatic configuration visible on the dashboard. The automatic configuration consists of all base objects mapped to the default hierarchy. For more information, see [Contact Center Advisor Default Rollup Configuration](#) in the *Contact Center Advisor and Workforce Advisor Administrator User's Guide*.

With the introduction of role-based access control (RBAC) in release 8.1.2 (for information, see the [Pulse Advisors Contact Center Advisor/Workforce Advisor Administrator User's Guide](#)), many configuration objects moved to the Genesys Configuration Server.

In release 8.1.2 and later, many of the objects you use to configure the Advisors modules exist in Genesys Configuration Server. That is, what you see in Genesys Configuration Server is what you have to build your Advisors configuration. You use the Advisors Object Migration Utility to automate the migration of objects from databases to Configuration Server. Any object you will require in your configuration must be either migrated from an earlier release using the Object Migration Utility, or you must manually create the objects in your Genesys configuration interface.

You can select only one option at a time for migration, but you can run the migration tool as many times as required to migrate all objects and metrics.

Be aware of any new privileges added to Advisors after release 8.1.2. Those new privileges have never been defined in any existing Advisors role in the Configuration Server; they cannot be migrated using a migration utility. To use new privileges added to Advisors after release 8.1.2, an administrative user must update existing roles or create new roles and add the privilege to allow the described access or activity.

Migration Paths

In general, migration of CCAdv/WA metrics data is a required step of your Contact Center Advisor/Workforce Advisor migration, but migration of other CCAdv/WA objects is optional. If you use Frontline Advisor, migration of FA metrics data is a required step. See below for additional release-specific information.

All Releases

The following migration options are provided by the installer for all Advisors releases that use the Object Migration Utility:

- Migrating the Frontline Advisors metrics data – The FA migration path involves exporting the FA metrics from the FA database to the Configuration Server. Only those FA metrics that are not present in Configuration Server are migrated.
- Migrating the Contact Center Advisor/Workforce Advisor data – The CCAdv/WA option migrates the following:
 - Metrics for both CCAdv and WA.
 - Metadata records of contact centers, application groups, and regions (geographic, reporting, and operating units).

Release 8.1.5

Starting in Release 8.1.5, the AGA configuration database is not required. The AGA configuration database data moves to Advisors Platform and Genesys Configuration Server. To transfer the data correctly, the Object Migration Utility includes a Genesys Adapter Configuration Migration option that moves:

- AGA source metric definitions and statistics templates to the Platform database
- Configured objects and filters to the Configuration Server

For detailed information about this option and the removal of the AGA configuration database (advisors_genadptdb), see the *Performance Management Advisors 8.1 Deployment Guide* for releases 8.1.2 and later. See [Migrating the Advisors Applications – 8.1 Releases](#) for details about running the Object Migration Utility to move the AGA configuration database data.

Release 8.5.0

Starting in release 8.5.0, FA no longer has a standalone database. The FA database content moves to the Advisors Platform database. The Object Migration Utility includes an option in release 8.5.0 to move the FA database content to the Platform database (Frontline Advisor Database Transfer). If you use FA, you must run the FA options in the Object Migration Utility in this order:

1. Frontline Advisor Database Transfer – For more information, see [Using the Frontline Advisor Database Transfer Migration Option](#).
2. Frontline Advisor Metrics

Release 8.5.2

Starting in release 8.5.2, you configure Stat Servers as connections to the Advisors Genesys Adapter (AGA) Application object in the Genesys Configuration Server. You can add a Stat Server primary/backup pair (or more than one) to each adapter's configuration. If you have Genesys Performance Management Advisors release 8.5.1 deployed in your enterprise, then you can use the Object Migration Utility to export the existing Stat Server configuration from the Advisors Platform database to the Configuration Server in order to add the connections to the AGA Application object. After the

Stat Server connections are configured to the AGA Application object, the Stat Server-to-AGA relationships, as well as the object-to-Stat Server mapping, continues to be stored in the Advisors Platform database. For more information, see [Migrating Stat Server-Adapter Relationships from the Platform Database to Configuration Server](#).

Release 9.0.0

Starting with Advisors release 9.0.0, there are changes to how you configure Advisors object filters. In earlier releases, you configured the filter expression in the **Description** field of the Filter Business Attribute. Starting with release 9.0, you configure the filter expression as an Annex option on the Filter Business Attribute. The Annex must contain a mandatory section called **Filter**. In this **Filter** section, you enter an option that defines the filter. Enter the filter expression in the **Option Value** field when you create the filter option. For more information about Advisors filter configuration for release 9.0, see [Using Advisors Filters Configuration to Segment Objects and Metrics](#) in the *Genesys Contact Center Advisor and Workforce Advisor Administrator User's Guide*.

The migration utility that ships with Advisors release 9.0.0 includes an option – Reconfigure Advisors Filters Business Attributes – that, when selected, automatically updates your existing filter configuration from earlier releases to be compatible with release 9.0 configuration. When you select the Reconfigure Advisors Filters Business Attributes option and run the Object Migration Utility, you are prompted for the Configuration Server details. The Configuration Server user that you specify must have Read and Change permissions on the Advisors Filters Business Attributes under the default tenant in the Configuration Server in order to update the filter configuration.

Starting with release 9.0, the Object Configuration User is no longer required or used in an Advisors deployment. In addition, this user is not required by the migration utilities or any migration procedure when upgrading to Advisors release 9.0.0. In case you have to roll back to release 8.5.2, Genesys recommends that you keep the Object Configuration User in the Configuration Server until you have verified that you have a successful installation of Advisors release 9.0. Once you have successfully migrated to release 9.0.0, you can remove this user from your configuration. Also see the [migration procedure for release 9.0](#).

Object Migration Procedures

Use the following procedures with the Advisors Object Migration utility:

- [Running the Object Migration Utility](#)
- [Using the Contact Center/Workforce Advisor Objects Migration Option](#)
- [Using the Frontline Advisor Metrics Migration Option](#)
- [Using the Genesys Adapter Configuration Migration Option](#)
- [Using the Frontline Advisor Database Transfer Migration Option](#)
- [Migrating Stat Server-Adapter Relationships from the Platform Database to Configuration Server](#)

Procedure: Running the Object Migration Utility

Prerequisites

- Ensure a supported version of Java is installed.
- If you must run the User Migration Utility, ensure you run it before running the Object Migration Utility.
- If you are migrating from release 8.1.5 to 8.5.0, the database migration scripts must be executed before running this Object Migration Utility.
- The Configuration Server user supplied must have read, create, and change permissions on the selected tenant.

Steps

1. Extract the file `advisors-migration-wizard-<version>.jar` from the `advisors-platform-distribution-<version>.zip`/ip/supplement folder.
2. Open the command prompt and change to the directory where the file `advisors-migration-wizard-<version>.jar` is extracted.
3. Run the following command:

```
java -jar advisors-migration-wizard-<version>.jar
```

The Object Migration Utility launches; click **Next**.

4. Select the migration path and click **Next**.

You can select only one migration option in a single run of the utility, but you can run the utility as many times are necessary to complete your migration. For more information about each migration option, go to the relevant procedure:

- [Using the Contact Center/Workforce Advisor Objects Migration Option](#)
- [Using the Frontline Advisor Metrics Migration Option](#)
- [Using the Genesys Adapter Configuration Migration Option](#)
- [Using the Frontline Advisor Database Transfer Migration Option](#)

Procedure: Using the Contact Center/Workforce Advisor Objects Migration Option

Purpose: To migrate Contact Center Advisor/Workforce Advisor objects and metrics. You can also migrate existing module access privileges using this option; although this option is placed

under the CCAdv/WA migration path, it migrates the module privileges for all Advisors components.

Steps

1. Select the items you want to migrate from the Advisors database. You can select more than one item at a time, but the following rules apply:
 - You must migrate your CCAdv/WA metrics, but migration of other data and objects is optional.
 - You must migrate contact center objects before you can migrate contact center permissions.
 - You must migrate application groups before you can migrate application group permissions.

Click **Next**.

2. Select the type of database you use in your enterprise and enter information in fields, as requested.

The migration utility prompts for information about database types supported in the release to which you are migrating. For example, in releases where Oracle RAC was first introduced, the utility prompts you for the location of the file that contains the JDBC URL when you select the Oracle RAC database type. You can find information about prompts, and the type of information to enter at prompts, in the [deployment procedures](#) in the *Pulse Advisors Deployment Guide*.

Click **Next**.

3. The **Migration Source Database** screen prompts for connection details for the Platform database.

After you enter your information on the screen, click **Next**.

4. Enter details about the Genesys Configuration Server to which selected objects are to be migrated. Click **Next**. The **Installation Progress** screen displays.
5. If required, check the details you have entered by clicking the **Show Details** button. When the details are correct, click **Install** to proceed with the migration.
6. When the migration is complete, review the log for errors or warnings.

Procedure: Using the Frontline Advisor Metrics Migration Option

Purpose:

To register Frontline Advisor metrics in Genesys Configuration Server for user access control as part of an Advisors upgrade or a new installation. If you are migrating from FA release 8.1.5 to 8.5.0, you must run the Frontline Advisor Database Transfer migration option before you run the Frontline Advisor Metrics migration option.

To migrate module access privileges, you must run the Contact Center/Workforce Advisor Objects migration option; although the option to migrate module access privileges is placed

under the CCAdv/WA migration path, it migrates the module privileges for all Advisors components.

Steps

1. Select the type of database you use in your enterprise and enter information in fields, as requested.

The migration utility prompts for information about database types supported in the release to which you are migrating. For example, in releases where Oracle RAC was first introduced, the utility prompts you for the location of the file that contains the JDBC URL when you select the Oracle RAC database type. You can find information about prompts, and the type of information to enter at prompts, in the [deployment procedures](#) in the *Pulse Advisors Deployment Guide*.

Click **Next**.

2. For migration to releases up to – and including – release 8.1.5, the **Migration Source Database** screen prompts for connection details for the Frontline Advisor database.

For migration to release 8.5.0+, you must enter connection details for the Advisors Platform database on the **Migration Source Database** screen.

After you enter your information on the screen, click **Next**.

3. Enter details about the Genesys Configuration Server to which selected objects are to be migrated.

Click **Next**. The **Installation Progress** screen displays.

4. If required, check the details you have entered by clicking the **Show Details** button. When the details are correct, click **Install** to proceed with the migration.
5. When the migration is complete, review the log for errors or warnings.

Procedure: Using the Genesys Adapter Configuration Migration Option

Purpose: Starting in release 8.1.5, the AGA configuration database is no longer used. The Genesys Adapter Configuration Migration option is available to migrate from Advisors release 8.1.4 to release 8.1.5. The tool also supports migrating from Release 8.1.3 to 8.1.5, but source metrics added for Frontline Advisor in Release 8.1.4 are not migrated. The option migrates data from the Advisors Genesys Adapter configuration database to the Advisors Platform database and Genesys Configuration Server, as required. See the [Performance Management Advisors 8.1 Deployment Guide](#) for additional information.

Prerequisites

- Create the Object Configuration User before running the Genesys Adapter Configuration Migration option; the migration option prompts you for the Object Configuration User information. See the *Performance Management Advisors 8.1 Deployment Guide* for details about the Object Configuration User.
- For best results, Genesys recommends that you configure the following permissions for the Configuration Server user that you will specify in the migration utility **Step 4**:
 - Change Permissions access permissions to update the security permissions of the monitored objects.
 - Change access permission to update the annex properties of the monitored objects.
 - Create and Change access permissions to create and update business attributes.

Steps

1. Select the type of database you use in your enterprise.

If you select Oracle, the utility also prompts you for the following information:

- Oracle setup – Select the option that describes your environment:
 - Select the Basic option if you use a single-instance Oracle database.
 - Select the RAC connectivity setup option if you use Oracle RAC.
- Oracle JDBC driver location

Click **Next**.

2. The **Migration Source Database** screen prompts for connection details for the AGA configuration database. Enter your information, and click **Next**.
3. The **Migration Destination Database** screen prompts for connection details for the Platform database. Enter your information, and click **Next**.
4. Enter details about the Genesys Configuration Server to which selected objects are to be migrated. See **Prerequisites** for important information about the Configuration Server user. (The Config Server Name is the name of the application (for example, confserver).) Click **Next**.
5. Enter the Object Configuration User you configured for Data Manager.
Click **Next**. The **Installation Progress** screen displays.
6. If required, check the details you have entered by clicking the **Show Details** button. When the details are correct, click **Install** to proceed with the migration.
7. When the migration is complete, review the log for errors or warnings.

Procedure: Using the Frontline Advisor Database Transfer Migration Option

Purpose:

Starting in release 8.5.0, Frontline Advisor data is stored in the Advisors Platform database. Use the Frontline Advisor Database Transfer option to migrate from Advisors release 8.1.5 to release 8.5.0 only; do not use this option during migration to any other release.

To migrate from FA release 8.1.5 to 8.5.0, you must migrate the FA data from the FA database to the Platform database before you migrate the metrics (that is, run the Frontline Advisor Database Transfer migration option before you run the Frontline Advisor Metrics migration option).

Steps

1. Select the type of database you use in your enterprise.

If you select Oracle, the utility also prompts you for the following information:

- Oracle setup – Select the option that describes your environment:
 - Select the Basic option if you use a single-instance Oracle database.
 - Select the RAC connectivity setup option if you use Oracle RAC.
- Oracle JDBC driver location

Click **Next**.

2. The **Migration Source Database** screen prompts for connection details for the Frontline Advisor database. Enter your information, and click **Next**.
3. The **Migration Target Database** screen prompts for connection details for the Platform database. Enter your information, and click **Next**.
4. The **Database Schema Names** screen prompts for the name of the source database schema that you are migrating (that is, the FA database schema), as well as the name of the target database schema (the schema in the Platform database) to which you are migrating.

Enter your information, and click **Next**. The **Installation Progress** screen displays.
5. If required, check the details you have entered by clicking the **Show Details** button. When the details are correct, click **Install** to proceed with the migration.
6. When the migration is complete, review the log for errors or warnings.

Procedure: Migrating Stat Server-Adapter Relationships from the Platform Database to Configuration Server

Purpose:

To migrate the existing Stat Server-AGA relationships from the Platform database to the Genesys Configuration Server. The migration utility's **Export Stat Server Config to Config Server** option performs the migration operation for all configured adapters in a single pass. Applicable for first-time migrations to release 8.5.2 only.

If you do not use the migration utility to migrate the Stat Server-AGA relationships to the Configuration Server, then you must manually configure the Stat Server connections and the Stat Server types using a Genesys configuration interface, such as Genesys Administrator. You might choose to perform this migration manually for security reasons, for example.

Prerequisites

- Be sure to run the **Export Stat Server Config to Config Server** option after migrating to release 8.5.2, but before you start any of the adapters.

Steps

1. Select the **Export Stat Server Config to Config Server** option and run the utility. Run the export option only once. The export option on the migration utility performs the following actions:
 - Adds configured Stat Servers as connections on the adapter Application object.
 - Configures backup Stat Servers based on redundancy links configured on the primary Stat Server Application object (where a backup Stat Server is configured).
 - Sets the supported Stat Server types on the **Annex** tab of both the primary and backup Stat Server Application objects.
2. Adjust the ADDP properties for your environment, if required. For more information, see [Next Steps](#), below.

Next Steps

The migration utility does not migrate the ADDP properties from the existing adapter configuration. Instead, on the adapter Application object, the utility turns on the ADDP connection mode and sets the default values for an ADDP connection. The default ADDP connection timeout values for Stat Server connections are the following:

- Remote timeout: 300 seconds
- Local timeout: 120 seconds

If you use something other than default values for ADDP connections between adapters and Stat Servers, then you must manually reconfigure those values after you export the Stat Server configuration to the Configuration Server using the migration utility.