Abstract

Starting with CIC 2015 R3, Interaction Desktop is the default CIC client. This document describes the Interaction Client Settings Migrator utility. This utility migrates user settings and client templates from Interaction Client .NET Edition to Interaction Desktop.
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Transition to Interaction Desktop Administrator's Guide 2
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Introduction
Starting with CIC 2015 R3, Interaction Desktop replaces Interaction Client .NET Edition as the primary CIC client. Interaction Desktop includes all the features of Interaction Client .NET Edition. It supports the same interaction types (calls, callbacks, chats, email, and work items). It also supports the same integrations with third-party applications such as Microsoft Lync.

Interaction Desktop enables agents to organize their work in new custom workspaces containing views appropriate to a single task, such as managing chats or callbacks. Interaction Desktop also provides dedicated views for managing email messages. These new email views provide a full email application experience with email folders, email message preview, and an improved email editor.

More information
For more information about using Interaction Desktop, see these materials which are available at https://my.inin.com/products/cic/Pages/PrintableDocumentation.aspx:
- Interaction Desktop Quick Start Guide
- Interaction Desktop Quick Reference Card
- Interaction Desktop Operator Console Quick Reference Card

Interaction Desktop also has a complete help system that is available in PDF and DOC format on the printable documentation site:
- Interaction Desktop client Help
- Interaction Desktop framework Help

Also, there is a client comparison chart that compares the features of all the CIC clients in IC 3.0 and CIC 2015. It is available in the CIC Documentation Library in the Interaction Client section at https://my.inin.com/products/cic/Documentation/index.htm.
- CIC Client Comparison

Audience
This document is for CIC administrators working to make the transition from Interaction Client .NET Edition to Interaction Desktop easier for agents and other users.

What the migration tool does
The Interaction Client Settings Migrator converts existing Interaction Client .NET Edition client templates to Interaction Desktop client templates. It also migrates Interaction Client .NET user settings to Interaction Desktop user settings.

Client templates
CIC administrators or template managers create client templates and assign them to users. These templates affect the appearance and functionality of a CIC client. When the IC server upgrades to CIC 2015 R3 or later, the migrator utility creates Interaction Desktop client templates based on existing Interaction Client .NET Edition templates.

Both Interaction Client .NET Edition and Interaction Desktop client templates:
- Can supply a standard set of user configuration settings.

Note: Client templates do not contain configuration settings by default. To use a template to force user settings changes, you use Interaction
Desktop in template mode to create or modify a template and change a setting in the Configuration dialog. Any changes to user settings (settings in the Configuration dialog) automatically apply to both Interaction Client .NET Edition and Interaction Desktop. These configuration settings are user settings, not application settings.

- Display a standard set of views, determine which columns and toolbar buttons appear in these views, and set the order in which the columns and buttons appear on these views.
- Set a default location for views included in the template.
- Control whether the CIC client starts in Mini Mode or standard mode.
- Display selected Fast Status buttons in Mini Mode.

In addition, Interaction Desktop client templates can supply:
- Multiple, pre-configured workspaces, complete with selected views for each workspace.
- The names of selected folders in the Email Folders view.
- The default font type and size for text outgoing email messages.
- Selected Fast Status buttons in the Interaction Desktop status bar, in both the standard mode and Mini Mode.

Client template files

CIC stores client template files on the IC server in \I3\IC\Resources\Client Templates. Regardless of the mode in which you run the utility, it creates Interaction Desktop versions of all your Interaction Client .NET Edition templates. The new template files have – Desktop appended to the file name; for example, Marketing template – Desktop.

Note: When the IC server upgrades to CIC 2015 R3 or later, the process also supplies a standard set of Interaction Desktop templates: All Channel Agent, Basic Chat Agent, Basic Email Agent, Basic Email Agent with preview, and Default template.

User settings

CIC client users with the Customize Client Security right can customize their personal CIC client configuration settings. Personal configuration settings include all the configuration settings available in a client template.
**User settings files**

CIC stores Interaction Client .NET Edition user settings in individual **Interaction Client.zip** files on the IC server in application settings directories:

I3\IC\ClientSettings\username\PersonalStorage\ApplicationSettings.

The Interaction Client Settings Migrator creates Interaction Desktop versions of the Interaction Client .NET Edition files. Agents who use Interaction Desktop and set it up in any way, by adding a view for example, also create Interaction Desktop user setting files. CIC stores these **InteractionDesktop.zip** files in I3\IC\Work\Users\username\PersonalStorage\ApplicationsSettings.

**Migration process**

The Interaction Client Settings Migrator runs automatically and silently when the IC server upgrades to CIC 2015 R3 or later. In automatic mode, the migration tool converts user settings only for users who have not yet modified the default layout or configuration settings for Interaction Desktop. Automatic mode preserves user settings for agents who have already used Interaction Desktop and possibly made configuration changes.

After the upgrade, you can also run the migration tool from the command line with the `/force` option to migrate Interaction Client .NET user settings for all users.

*Note:* Interaction Desktop has been available in a beta release since CIC 4.0 SU 5. Early adopters or users who explored Interaction Desktop in an early form created Interaction Desktop user settings files that are **overwritten only if you use the /force option**.

**Switchover pair**

If your configuration includes an IC server switchover pair, the migration process has to occur only on the primary server.

**Automatic mode**

During the IC server update to CIC 2015 R3 or later, the upgrade runs InteractionClientSettingsMigrator.exe /auto. The migration process affects these typical users in the following ways:

<table>
<thead>
<tr>
<th>Scenario</th>
<th>Result</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agent has used only Interaction Client .NET Edition.</td>
<td><strong>Migrates</strong> Interaction Client .NET Edition client settings to Interaction Desktop client settings.</td>
</tr>
<tr>
<td>Agent modified the Interaction Desktop layout or configuration.</td>
<td><strong>Does not migrate</strong> Interaction Client .NET Edition client settings to Interaction Desktop client settings.</td>
</tr>
<tr>
<td>Agent modified the Interaction Desktop layout or configuration and then went back and modified the Interaction Client .NET Edition layout or configuration settings.</td>
<td><strong>Does not migrate</strong> Interaction Client .NET Edition client settings to Interaction Desktop client settings.</td>
</tr>
</tbody>
</table>
Manual mode

You can run the migration tool again after the upgrade to CIC 2015 R3 or later. Using the default options, the migration process affects users in the following ways:

<table>
<thead>
<tr>
<th>Scenario</th>
<th>Result</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agent modified the Interaction Desktop layout or configuration after the CIC 2015 R3 install.</td>
<td>Does not migrate Interaction Client .NET Edition client settings to Interaction Desktop client settings. The Agent keeps the existing Interaction Desktop layout and settings.</td>
</tr>
<tr>
<td>Agent modified the Interaction Desktop layout or configuration before the CIC 2015 R3 install.</td>
<td></td>
</tr>
<tr>
<td>Agent modified the Interaction Desktop layout or configuration and then went back and modified the Interaction Client .NET Edition layout or configuration settings.</td>
<td></td>
</tr>
</tbody>
</table>

Forced migration

After the upgrade to CIC 2015 R3 or later, you can run the migration tool again with the /force option. A forced migration affects users in the following ways:

<table>
<thead>
<tr>
<th>Scenario</th>
<th>Result</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agent modified the Interaction Desktop layout or configuration after the CIC 2015 R3 install.</td>
<td></td>
</tr>
<tr>
<td>Agent modified the Interaction Desktop layout or configuration before the CIC 2015 R3 install.</td>
<td>Migrates Interaction Client .NET Edition client settings to Interaction Desktop client settings and overwrites the existing Interaction Desktop layout and settings.</td>
</tr>
<tr>
<td>Agent modified the Interaction Desktop layout or configuration and then went back and modified the Interaction Client .NET Edition layout or configuration.</td>
<td></td>
</tr>
</tbody>
</table>

How to run the Interaction Client Settings Migrator manually

The upgrade to CIC 2015 R3 or later places a copy of the migrator utility on the IC server in \I3\IC\Server. You can run this utility at any time, using this command syntax:

- To migrate settings in automatic mode, type `InteractionSettingsMigrator /auto`
- To migrate settings in manual mode, type `InteractionSettingsMigrator`
- To migrate settings in forced mode, type `InteractionSettingsMigrator /force`
Process flowchart

1. Execute `InteractionClientSettingsMigrator.exe` with command line flags `-auto -force`.
2. Prompt: "Proceed with settings migration?"
   - No: Exit
   - Yes: Loop through all "Interaction Client.zip" Settings.xml files
3. Was command line argument "auto" used?
   - Yes: Was command line argument "force" used?
     - Yes: Loop through all ClientTemplates, and create corresponding "Template - Desktop" files, if they don't exist.
     - No: Prompt: "There are templates with the same names. Do you wish to overwrite them?"
6. Were any ClientTemplates already migrated?
   - Yes: Write or update the user and LastModifiedDate of the newly created "InteractionDesktop.zip" file to PreviouslyMigratedSettings.csv
   - No: Prompt: "There are templates with the same names. Do you wish to overwrite them?"
7. Were any ClientTemplates already migrated?
   - Yes: Create a new "InteractionDesktop.zip" Settings.xml file (overwrite if necessary)
   - No: Create a PreviouslyMigratedSettings.csv to store users and created dates for Interaction Desktop templates
8. Does a corresponding "InteractionDesktop.zip" Settings.xml file exist?
   - Yes: Loop through all ClientTemplates, and create corresponding "Template - Desktop" files, if they exist.
   - No: Check if the last migration was successful.
9. Does PreviouslyMigratedSettings.csv contain this file?
   - Yes: If the LastModifiedDate is newer than or equal to the LastModifiedDate of the existing "InteractionDesktop.zip" file
     - Yes: If there is no entry in PreviouslyMigratedSettings.csv, the user has already had an InteractionDesktop.zip Settings.xml file
   - No: If the LastModifiedDate matches the timestamp in Migrated.csv, the user has not made any setting changes since the last migration and are safe to migrate.