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Interactive



## **QMS MIGRATION UTILITY GUIDE**

### **Version 5.4**

Installing and using the QMS Migration Utility to migrate calls from Record and Evaluate into QMS

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## QMS MIGRATION UTILITY GUIDE

**Version 5.4**

The purpose of this guide is to provide an overview of how to install and use the QMS Migration Utility to migrate calls from Record and Evaluate into QMS. Record and Evaluate uses a different audio format and different record formats for storing data, a migration is needed to move them from Record and Evaluate into QMS, and this tool will provide all the needed conversions and transformations necessary to get this information into a new or existing installation of QMS.

### **Installation**

The Migration Utility is available in the QMS QM\_Suite and QM\_Suite\_with\_prerequisites zip files under \Upgrade Tools\QMSMigrationUtility. You can copy this directory anywhere on the filesystem for use, but the system you use it on should have access to the same resources as the server the Data Service and Recording Service are installed to. Because of this, it is recommended to copy it to the same server the Data Service is installed on.

### **Before you Migrate**

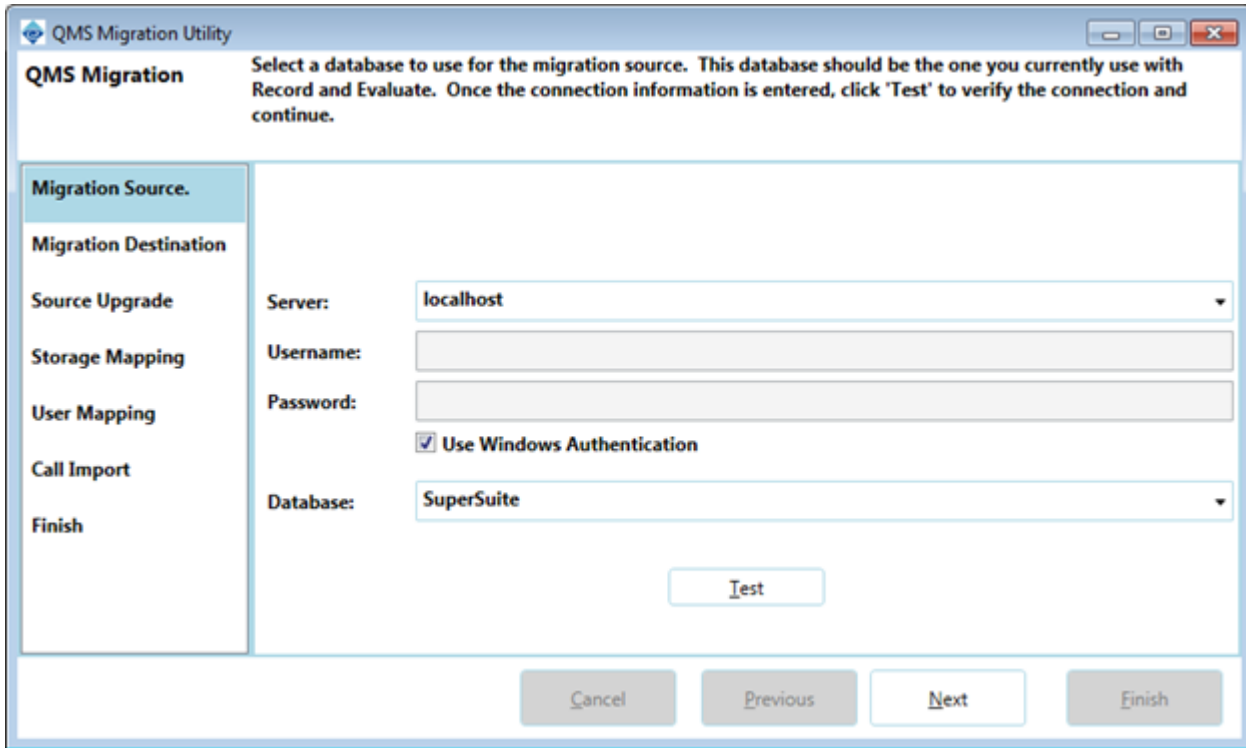
Before migrating data, QMS must already be installed on the server that you plan to migrate to, and the Call Recording Service(s) must have been set up before migrating data, so that the storage location for call recordings is available to the import utility. In addition, if you have archived recordings in your source system, you must have a directory or share available to store these archived recordings. It is recommended you completely set up archiving in QMS before importing, but the only requirement is to have the directory set up that you plan to store the archived recordings in available to QMS and the Import Utility.

Users can be set up in QMS before migrating, but it is not necessary. The migration utility will make best efforts to match users in the source to existing users in QMS, and if none are found, it will automatically create new accounts for users that are missing.

The QMS Migration Utility will upgrade your existing database before migrating. In some cases, this can leave the old system inoperable, so it is suggested you back up the source database before proceeding, so that it can be restored if you think you will need to return to your old system.

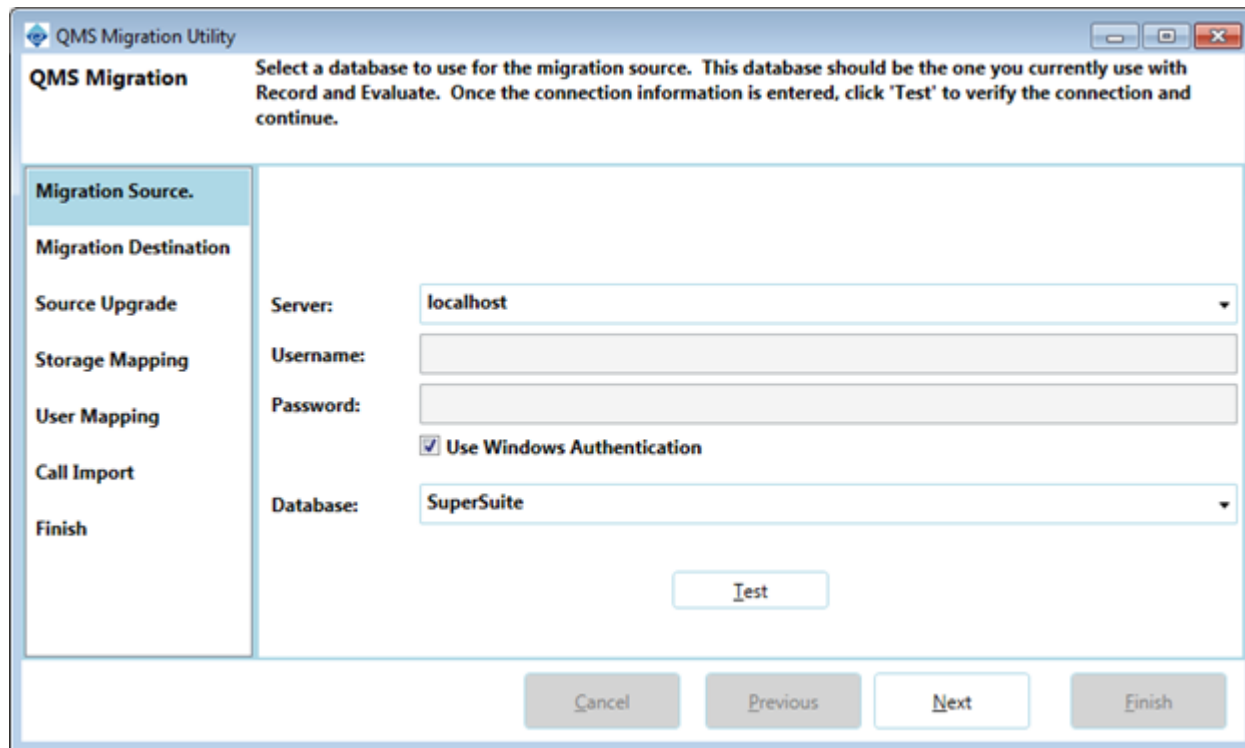
### Migrating data using the QMS Migration Utility

Migrating data using the QMS Migration Utility requires several steps, which are visible on the left side of the utility. In order for the server list to see your server, Microsoft SQL Server Agent must be running.



These steps will first ask you for connection information to the source and destination databases. Once connection information has been verified, the utility will run any upgrade and initialization scripts against the source database to ensure that it is upgraded to the latest version, and then perform mapping for call storage and users between the two systems. Once mapping is complete, the utility will import all calls from the source database into the destination (QMS). After all calls have been imported, the tool will indicate it has completed (the “Finish” step) indicating all migration tasks were successfully completed. Further details about each step with screenshots are outlined below.

### Migration Source

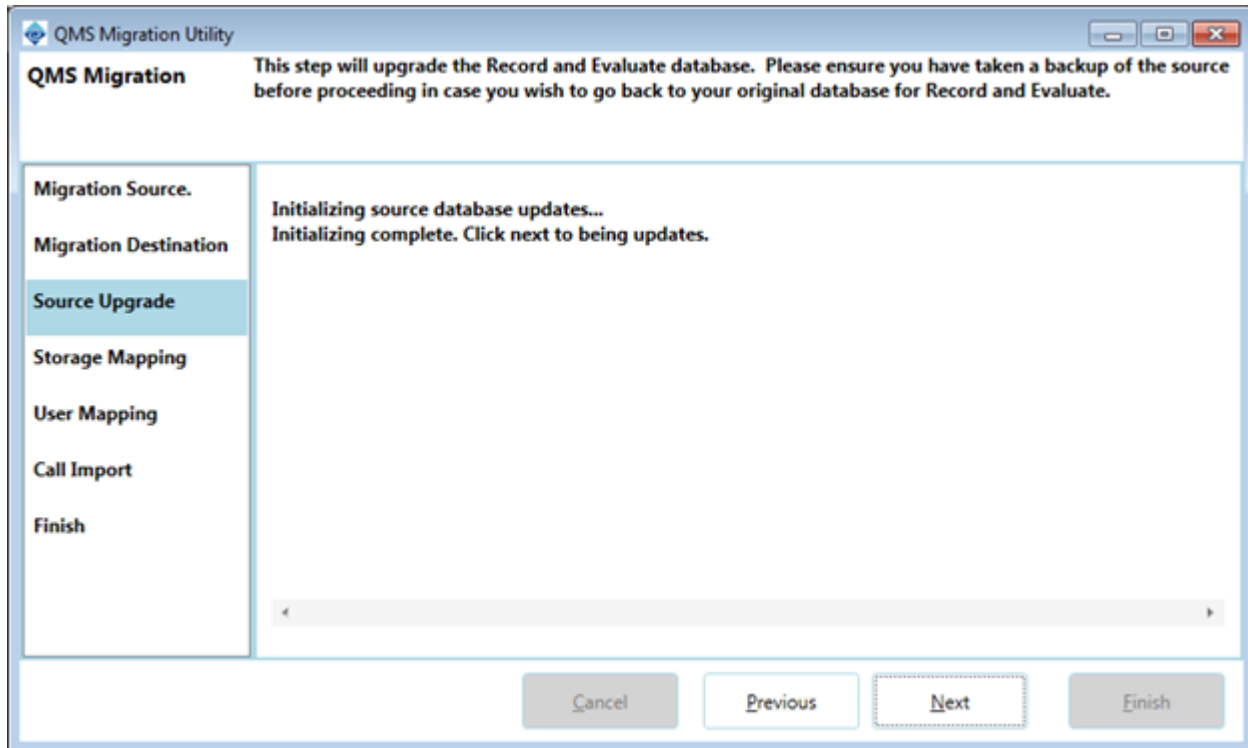


- This is the source database (R&E)
- The “Server” selection can be entered manually, or you can select a server from the dropdown
- Username/Password – The username and password of an account that has full access to the Supersuite database.
- Use Windows Authentication – If you can access the database using the logged in user’s credentials, check this box. This will disable the username and password fields as they are no longer necessary.
- Database – This is the database on the server you wish to use as the source. Normally this is normally “Supersuite” but you are able to manually enter a database name, or select one from the dropdown.
- Test button – This allows you to test your connection to verify you have entered valid connection details. Once clicked, it will display “Success” above the button if the test passed.

## Migration Destination

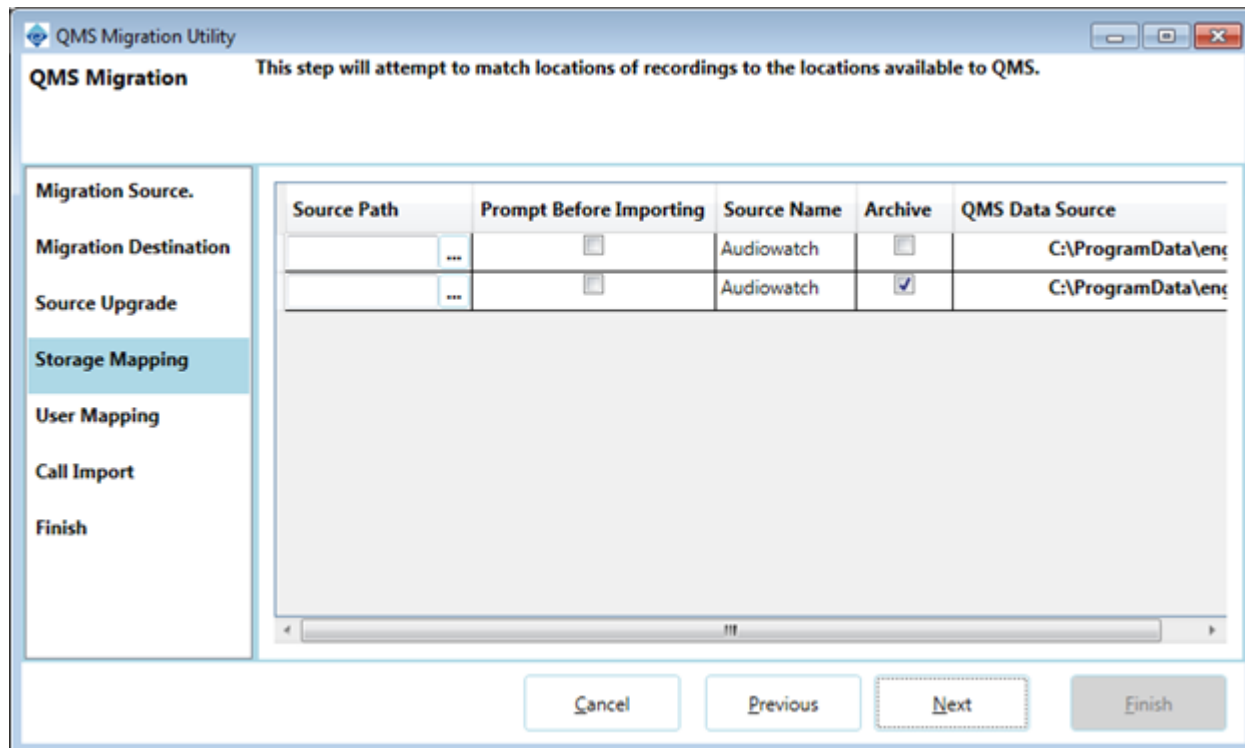
- This is the destination database (QMS)
- The “Server” selection can be entered manually, or you can select a server from the dropdown
- Username/Password – The username and password of an account that has full access to the Supersuite database.
- Use Windows Authentication – If you can access the database using the logged in user’s credentials, check this box. This will disable the username and password fields as they are no longer necessary.
- Database – This is the database on the server you wish to use as the source. Normally this is normally “telrex35” but you are able to manually enter a database name, or select one from the dropdown.
- Test button – This allows you to test your connection to verify you have entered valid connection details. Once clicked, it will display “Success” above the button if the test passed.

## Source Upgrade



- The Source Upgrade step does not require any user interaction. It merely serves as a pause to allow you to back up the source database before upgrading it.
- Hitting Next will run the upgrade, and proceed to the next step.

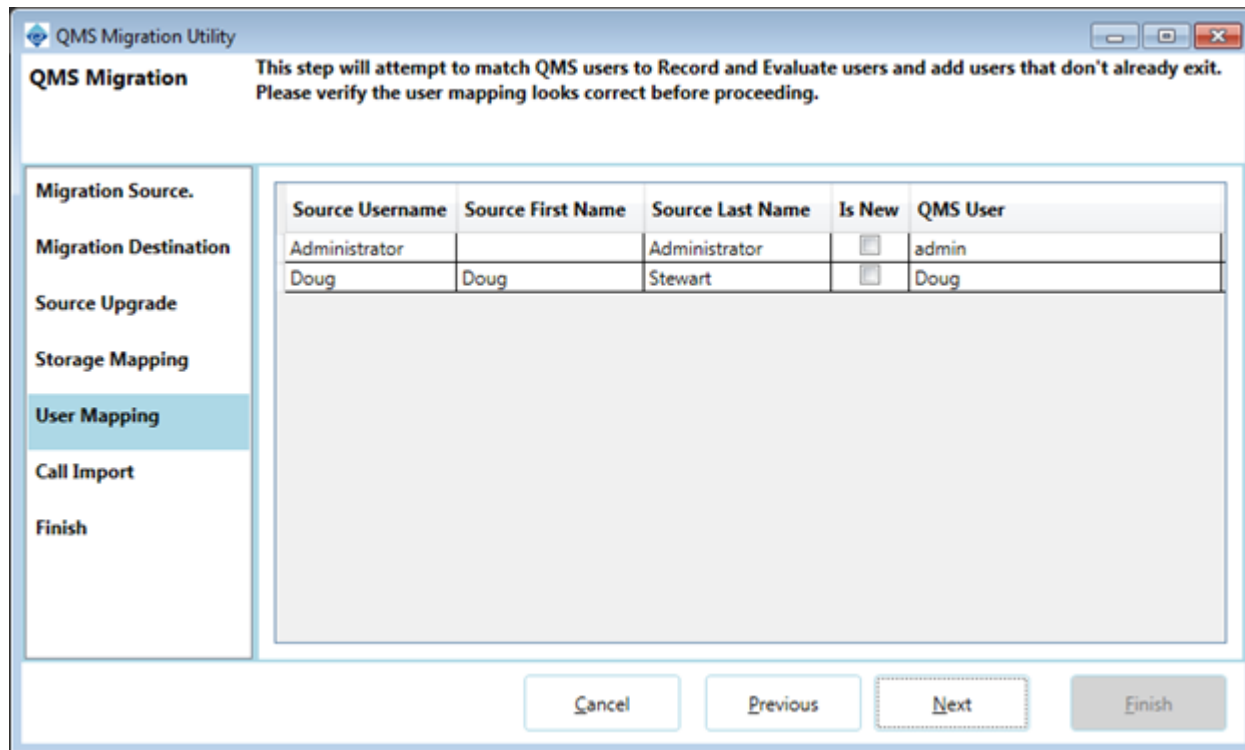
### Storage Mapping



- Storage Mapping will locate all available storage locations from the source (Supersuite database) and map them to data sources in QMS.
- If QMS does not have a Data Source available for regular or archived calls, this step will immediately prompt you to select a path to the appropriate directory.
- Each source location must have be defined manually by clicking the “Browse” button under “Source Path” and navigating to the directory housing these recordings.
- Alternatively, you can select “Prompt Before Importing” for each storage location you want to be prompted for during the import.
  - This is useful for calls on removable media (Like tape, optical disc, or removable drives)
  - This will pause the import process mid-stream when such a storage location is reached, so you will need to be attentive to this during the import process.

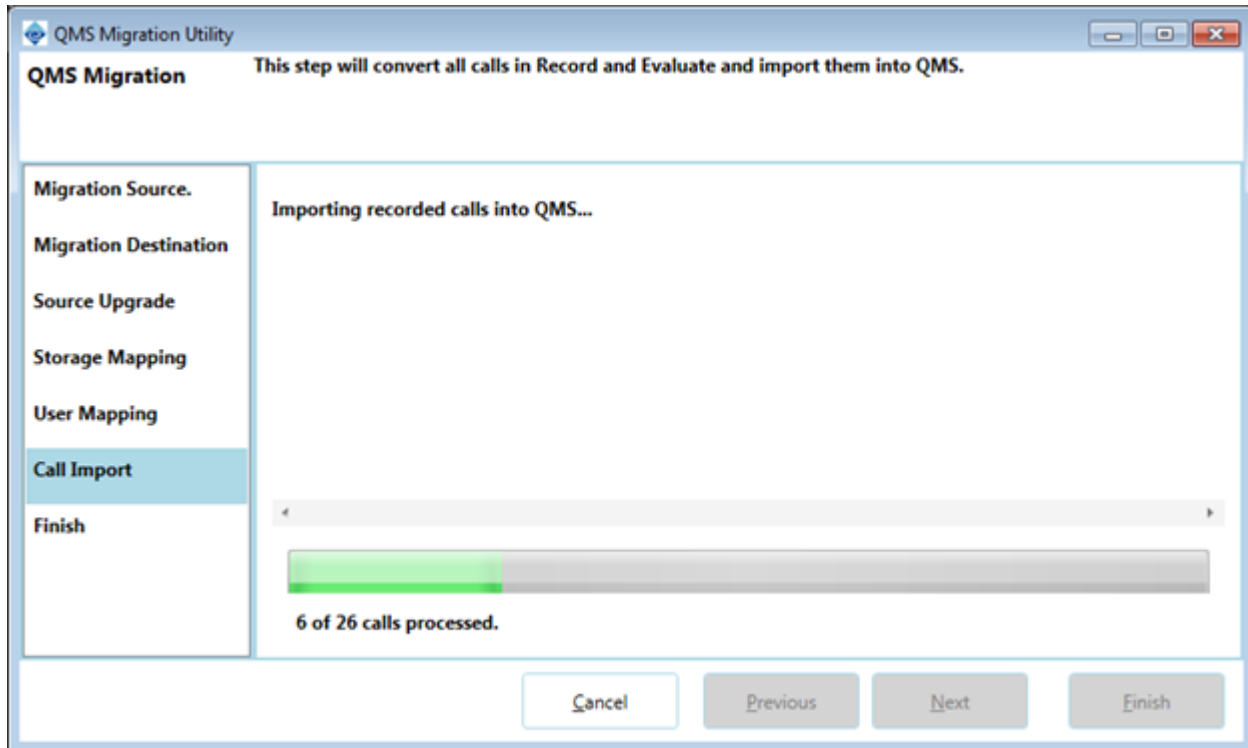


### User Mapping



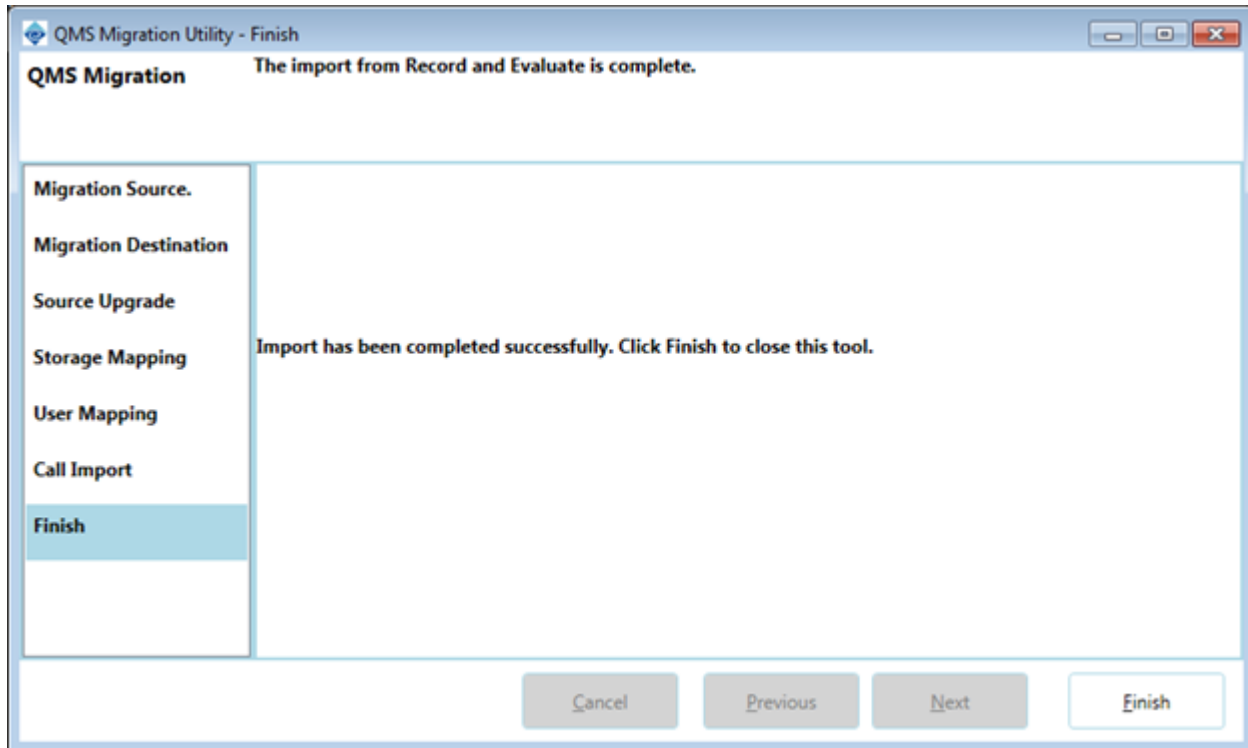
- User Mapping shows the mapping between source users and QMS Users.
- No user interaction is needed on this screen, but it allows you to review the user list to ensure everything has been mapped correctly, and allows you to cancel if you need to alter any existing users in QMS before proceeding.

## Call Import

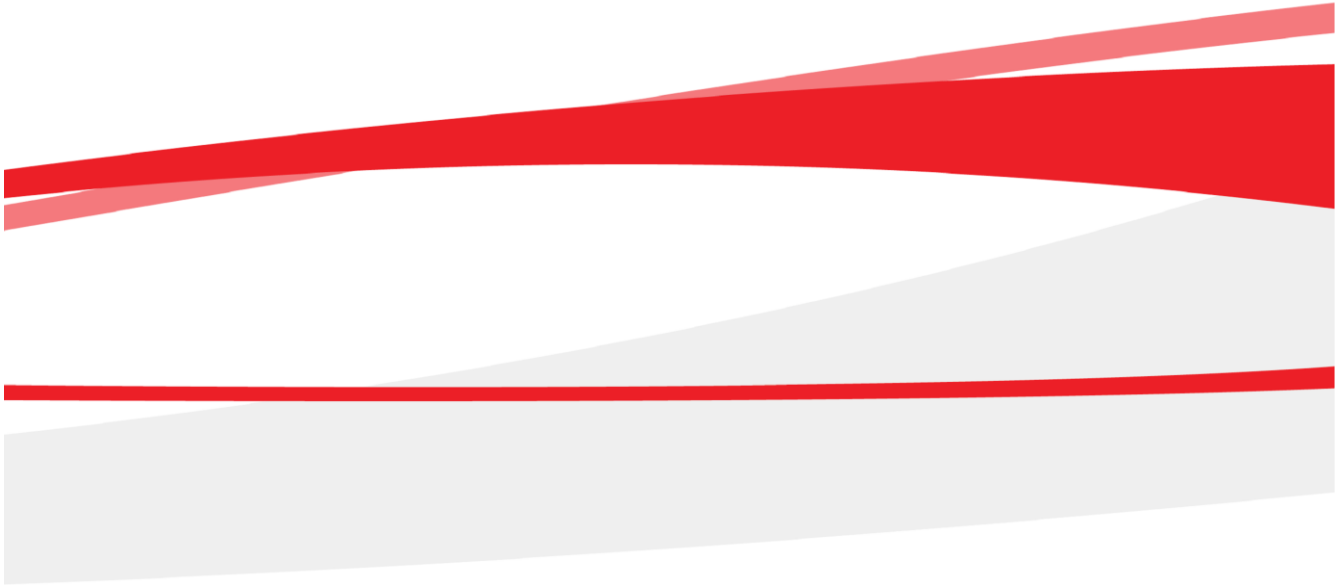


- The call import process will spin through all source locations, and convert each recording into a format QMS can recognize, then import those calls into QMS automatically. The screen contains a progress bar and text to show how many recordings have been imported, and how many are left.
- If any sources from the “Source Mapping” step had “Prompt Before Importing” checked, a folder browser will pop up when those sources have been reached during the import process.
- Aside from the “Prompt Before Importing” sources, no other user input is needed for this step.

## Finish



- This step means the import process has completed, and you can click “Finish” to close the utility.



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