

Cisco Webex Workforce Optimization

Getting Started Guide for Cisco Unified Workforce
Optimization Customers

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Migration Made Easier

Cisco Webex Workforce Optimization (Cisco Webex WFO) was built from the ground up, leveraging the best aspects of Cisco Unified Workforce Optimization (Cisco Unified WFO). Cisco Unified WFO customers will find adopting Webex WFO very easy due to the same user experience and comprehensive resources provided by Cisco.

- **Same UX – seamless transition:** Our native cloud applications give you the same workflows and functionality you already know – upgrading and enhancing them with the power of the cloud.
- **Comprehensive** – Because our Cisco Webex WFO was developed from Cisco Unified WFO, you have a full range of resources—from development and QA, to implementation and support dedicated to making Cisco Webex WFO successful for you.

System Requirements

Version 11.x

Customers can migrate from any version of Cisco Unified WFO. However, if the customer is using v9.x through v11.5(1) SR7 ES1, customer's database must be upgraded to version 9.5(1) SR7 ES2 or later.

CryptoKeyStore File

Before v11.5, the CryptoKeyStore file was unencrypted. When upgrading from v9.0–11.0 to v11.5 prior to migration, this file must be imported into v11.5. The v11.5 file can then be exported and used in the migration.

Application Requirements

You must configure application settings as follows before migrating the customer.

Organization Requirements: Team and Group Names

If the customer's v11.5 system uses group names that are identical to team names, those group names should be changed to names distinct from team names before migrating data to the Cisco Webex WFO system. Cisco Webex WFO does not support duplicated team and group names.

Sync Requirements

In order to mitigate issues when migrating data, it is best to synchronize agents and devices into the Cisco Webex WFO system before migrating any other data.

In the Cisco Webex WFO system, do the following:

1. Set up the ACD on the ACD Configuration page.
2. Connect to the PBX on the Telephony Groups page.
3. Sync agents.
4. Sync historical data.
5. Sync devices.

Once this data is synced with the Cisco Webex WFO system, you can proceed with migrating the customer's data.

Migration Approach

Net new deployment

With a net new deployment, a fresh installation of Cisco Webex WFO is built in parallel and a cutover is planned from the existing production system, leaving that as a search-and-play archival system*. This option is the most seamless and economical option and gets you to Cisco Webex WFO without requiring any data migration.

The primary benefit of this approach is it puts you on the critical path to move from Cisco Unified WFO to Cisco Webex WFO, by eliminating the tasks and risks associated with data migration(s). It's an opportunity for a clean break from an old platform to a new platform.

**Cisco will continue to support your Cisco Unified WFO on-premises system as a search-and-play archival system, allowing you to maintain your retention requirements. The archival system can be retired once the retention period has elapsed.*

Pricing – Net New Development

Call Recording and QM Costs

- Standard cloud services pricing and discounts apply

WFM Costs

- Standard cloud services pricing and discounts apply

Partial or full system migration

A partial or full system migration occurs when a full installation of Cisco Webex WFO is built and you want to retain some or all of the configuration data, media, and historical data that is in the existing system.

The benefit to this approach is the majority of data from your Cisco Unified WFO system will be on a single platform.

The drawbacks of this approach is timeline for this method leaves the door open for unplanned project float, due to technical obstacles, if there is a single or multiple migration, and most importantly the timing and economics of these migrations is greater than a net new development.

Pricing – Migration

Call Recording and QM Costs

- Pricing will include Base Migration Service with an additional charge per million Contact Records
 - The number of CCR's can be determined by running the following query against their database:

- **select count(*) from ccr where audioUploadState = 2**

WFM Costs

- Pricing will include Base Migration Service and no additional charge based on customer size.

Quality Management (QM) and Workforce Management (WFM) Data: What Migrates and What Doesn't

QM Data

The following **QM data will be migrated** into the new Cisco Webex WFO platform from Cisco Unified WFO.

- CCRs
- Contact Goals
- Devices
 - Must sync in new environment first for migration to process successfully
- Evaluations (Manual Export / Import) Part of Migration tool
 - Evaluations scores and templates are migrated
 - Evaluation comments are not migrated
- File crypto keystore
- Media Files
- Metadata
- Recording Events
- Retention Policy
- Root Recordings

The following is **QM data that will not migrate** and will need to be recreated and reconfigured in the new Cisco Webex WFO platform. (Please work with your project team on defining and assigning tasks that involve the migration.)

- Telephony groups
- Signaling groups
- Recording clusters
- Custom Roles (if requesting a 'like for like' type setup to the roles in their current 9.X)
- Devices
- Saved reports
- Scheduled reports
- QM dashboards
- Survey configuration
- Custom retention policies
- Recording storage locations
- Workflow Classifiers and Retention
 - Need to create go-forward retention policies
 - Manually set overall retention to oldest record
 - Unlimited retention period needs to be set in 9.5
- Manual copy of media files for screen and recording playback
- (outside of migrated data)

WFM Data

The following **WFM data will be migrated** into the new Cisco Webex WFO platform from the old system.

- Work Shifts
- Work Conditions
- Work Condition profiles (including associations to agents and work conditions)
- Service Queues
- Service Queue Groups (including associations to agents and service queues)
- Skill Mappings (Including associations to agents and service queues)
- Multiskilled groups (Including associations to agents and service queues)
- Agents' main service queue
- Views (including associations to agents, work shifts, work conditions, service queues, service queue groups, skill mappings, multiskilled groups, users, and teams)

The following is **WFM data that will not migrate** through the migration tool and will need to be recreated by the customer. (Please work with your project team on defining and assigning tasks that involve the migration.)

- Projects
- Schedules, Future and Past
- Custom Roles (if requesting a 'like for like' type setup to the roles in their current 11.5)
- Forecasts/Distributions
- Messaging History (schedule requests / PTO configuration / Vacation Pools)
- Workflows (for messaging, as an example)
- Dashboard Widget configuration
- Firm dates / Special Events
- Shrinkage (scenarios, weeks, categories)
- Service queue close dates
- Adherence Settings
- Virtual Queue Data

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