Workforce Management Migration Guide

Order of Migration

5/8/2025

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The following tasks apply to all migration procedures:

1. Prepare for Down Time

A period of down-time is inevitably associated with the database update. This down-time could be substantial (up to 1 day), depending on the amount of data you are migrating and the operating system you are using. You must take this into account when scheduling your database migration and perhaps, consider performance tuning.

> ### Tip
> Perf collection and the database update can be performed simultaneously. However, performance might be slow due to the load on the database server while the WFM database is being updated.

Minimizing Down Time

If you are migrating a large data set, you can minimize your data collection downtime by using the procedure Two-Step Migration. Consult with Genesys Professional Services or Genesys Customer Care if you need recommendations for how best to plan and ensure your existing data is migrated into your environment.

2. Back Up Your Database

Genesys recommends that you back up your database before beginning your migration or update. If you are currently running a version of WFM earlier than 6.5.201.00, the WFM Database Utility automatically updates your existing database to 6.5.201.00 while migrating your data to the 7.x database. Doing so changes the original database structure in such a way that you can no longer use your original database in your existing environment.

If you have Workforce Management 6.5, the WFM Database Utility automatically performs the additional upgrades required before your data can be transferred to the new Workforce Management 7.x Database.

> **Tip**
>
> Starting in 8.1.3, a beta version of the command-line WFM Backup-Restore Utility (BRU) is included in the WFM Database Utility (DBU) Installation Package (IP). Unlike the WFM DBU backup file (.MDB format), which has a maximum 2 Gb file size limit, the BRU uses a new backup file format (.DB) and has no file size limit. For more information about the BRU, see Using the Backup-Restore Utility.

3. Migrate or Update the Database

Complete one of the following procedures, depending on which release you are updating or migrating to WFM 8.5:

- Procedure: Updating WFM 8.x or higher
- Procedure: Updating WFM 7.x or higher
- Procedure: Migrating WFM 6.5

4. Verify Your Connections

If you experience any connectivity issues immediately after any migration or update:

- Check the Details sections of each Login screen to verify that your applications are pointing to the correct WFM Application objects.
- Verify that you have the correct connections specified on the Connections tabs of the Application objects for each component.
- In WFM Configuration Utility's Organization module, update:
  - Data Aggregator Name for each Business Unit object
  - Data Aggregator Name for each Site object
  - Data Aggregator for synchronization for each Site object
  - WFM Server for each Site object
- In WFM Configuration Utility's User Security module, update:
  - WFM Builder object for each user