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# Workforce Management Migration Guide

Workforce Management 8.5.0

3/14/2022

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# Workforce Management Migration

Welcome to the Workforce Management (WFM) Migration Guide. This guide provides instructions and procedures that will help you to migrate or update your Workforce Management deployment to various WFM releases. It also provides an overview of any changes that were implemented in each WFM release.

The information in this guide is provided, based on the assumption that you have read and are familiar with WFM 8.5 features, architecture, deployment planning guidelines, and software prerequisites in the *Workforce Management Administrator's Guide*. These topics present an overview of Workforce Management.

## Planning

Find information that provides an overview of WFM Migration.

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- [Overview](#)
- [Prerequisites](#)
- [Order of Migration](#)

## Deploying

Find procedures that will help you to deploy WFM and update to the latest release.

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- [Deploying](#)
- [Upgrading to WFM 8.5.x Releases](#)

## Minimizing Downtime

Minimize downtime by using an alternate migration procedure or use troubleshooting tips to resolve issues during or after migration.

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- [Two-Step Migration](#)
- [Troubleshooting](#)

# Migration Overview

The most important aspect of Workforce Management (WFM) migration is migrating or updating the database. Configuring and installing the new components is the same whether you are migrating, updating, or installing them for the first time. Therefore, the topics in this guide focus mainly on migrating or updating the database.

See [Installing Workforce Management](#) for configuration and installation procedures.

The procedures in this guide include only those steps that are specific to migrating or updating from previous product releases. Procedures that all users of Workforce Management must perform are documented in [Installing Workforce Management](#) and [Manually Creating and Configuring Application Objects](#). Be sure to check the [Workforce Management Administrator's Guide](#) before beginning the migration.

## Important

If you are migrating your WFM deployment to release 8.1.3 or later, you can also use an Extract, Transform and Load (ETL) Database, which enables Genesys Interactive Insights and other third-party reporting applications to easily create reports that incorporate WFM data. For more information about how to use this database, see [Using an ETL Database](#).

For a complete description of the WFM ETL Database schema, see the [Workforce Management ETL Database Reference](#).

## Migrate versus Update

You use different procedures when you update a 7.x or 8.x database, than when you migrate a WFM 6.5 database, because the WFM database design was changed after the 6.5 release.

To update 7.x or 8.x to a later version of WFM, you make only minor modifications in the existing database (because the 7.x and later databases are similar).

To migrate your 6.5 data, you first create a new 7.x or 8.x database, complete with new tables. Then, you migrate (move) your 6.5 data to the new database, by copying and pasting.

In both cases, complete the following steps in this order:

1. [Prepare for Down Time](#)
2. [Back Up Your Database](#)
3. [Migrate or Update the Database](#)
4. [Verify Your Connections](#)

# Migration Prerequisites

Check the [Genesys Supported Operating Environment Reference Guide](#) for the supported platforms and databases, as well as the additional software required to operate WFM 8.5.0. If you intend run a new instance of WFM, you must first update the supported operating environment.

## Genesys Framework Components

You must have deployed the following Genesys Framework components in your environment to support forecasting, scheduling, and adherence capabilities:

- Configuration Server
- Genesys Administrator or Configuration Manager
- T-Server
- Stat Server

## Framework Version

For full interoperability with Workforce Management 8.5.0, use Genesys Framework 7.2 or later releases. Using Workforce Management 8.5.0 with component releases earlier than 7.2 limits use of the Configuration Wizards, Management Layer support, and Reason Code support.

## Workforce Management Versions

You can update to WFM 8.5.0 from any WFM 8.x or 7.x release or migrate a 6.5 release.

When you deploy WFM, ensure all components are within the same release stream. For example, if you are using an 8.5.0 database, ensure all other WFM components are version 8.5.0.

### Important

If you are currently running a release of Workforce Management earlier than 6.5.201.00, the WFM Database Utility must change the original database structure during the update process in such a way that you can no longer use your original database in your existing environment. Genesys recommends that you backup your database before beginning your migration.

## Database Sizing

Release	Sizing requirements
Updating WFM 8.x	The database size required for WFM 8.5.0 is approximately the same as for all 8.x release of WFM.

Release	Sizing requirements
Updating WFM 7.x	The database size required for WFM 8.5.0 is approximately the same as for the 7.x release of WFM.
Migrating WFM 6.5	The ratio of a WFM 6.5 database to a WFM 8.x database is approximately 11:9. The WFM 8.x database is actually smaller than the WFM 6.5 database. However, forecast and schedule scenarios are stored in the 8.1.x database, rather than in a local or network file. When you add the space that is required to store scenarios, the database size needed for WFM 8.x comes to approximately the same size as that required for WFM 6.5.

# Preparing to Upgrade or Migrate WFM

Before you deploy Workforce Management for your migration or upgrade, you must consider the following:

- The changes or new features in the release that you are migrating to and how they will affect your migration. See [Changes in WFM Releases](#).
- The order in which you should complete the migration tasks. See [Order of Migration](#).
- What to do if you need to roll back your installation. See [Rolling Back the Installation](#).

For a complete list of WFM system requirements (supported and discontinued) for each release, see the [Genesys Supported Operating Environment Reference Guide](#).

## Changes in WFM Releases

This section briefly describes changes in WFM 8.x, 7.x, and 6.5 releases. For a complete description of the changes and new features in WFM releases, see the [New in This Release](#), or the WFM Help for the referenced component.

### 8.x Changes

- For WFM 8.5 releases, see [Workforce Management 8.5 Release Information](#).
- For WFM 8.1 releases, see [Workforce Management 8.1 Release Information](#).
- For changes in the WFM 8.0 releases, see the section "New Features in 8.0" in the [Workforce Management Administrator's Guide](#).

### 7.x Changes

WFM 8.1.1 and later deployment—that is, configuration and installation of the components—is essentially the same as for version 7.x. Note that beginning with version 7.2, WFM Reports Server is no longer a separate installation package.

### 6.5 Changes

If you are currently running WFM 6.5, deploying Workforce Management 8.1.1 and later releases differs from your current version in two major respects:

1. The installation of WFM components is now performed using separate installation packages rather than a single one.
2. The increased capabilities of the WFM Web component eliminate the need to deploy a Windows-based client for many current WFM users. The majority of WFM users, with the exception of those who need to

configure the WFM system and its working rules, use the browser-based WFM Web only.

When your database objects are migrated to a WFM 8.1.1 or later release, some terms have changed. See [New Terminology in Post-6.x Databases](#) for a list of these changes.

### Important

Forecast and schedule files located on client workstations are no longer available after migration. To save these files, publish the forecasts and schedules you want to keep before beginning your migration. Published schedules and forecasts, which are saved to the database, are migrated with the rest of the data. For the step-by-step installation and configuration procedures, see the [Installing Workforce Management](#).

### New Terminology in Post-6.x Databases

WFM 7.1.2 introduced some new terms and made changes to some existing configuration objects. The table below provides only basic information about the changed terms. For detailed explanations of these, and all WFM objects, see the [Overview](#) and [Deployment Planning](#).

The following new terms did not exist in 6.5:

- Task
- Task Sequence
- Calendar Item

### Show table.. [+]

**Table:** Terminology Changes from 6.5 to 7.x

Previous term	Current term
Virtual PABX	Business Unit
PABX, PBX, switch, location	Site
Exclusivity Sets	Activity Sets
Compliance Rules	Adherence Rules
PABX Time Offset Information	Daylight Saving Time Information
Virtual Activity	Multi-Site Activity
Scheduled Agent's State	Schedule State Group
Aux Code	Reason
Genesys Events	Agent State
Supervisor [in security configuration]	User, WFM User
Definitions Report	Properties Report
Activity Type: Phone Activity	Immediate Work
Activity Type: Multimedia Activity	Deferred Work

Previous term	Current term
Activity Type: Exclusive Activity	Fixed-Staff Work
Workforce	Staffing
Vacation Planner [limits]	Time Off Limits
Time Information, Open Hours	Hours of Operation
Long Period	Schedule Planning Period
Employment Type	Contract
Working Hours	Paid Hours
Unpaid Time	Unpaid Hours
CTI System Information	Agent Information
Employee Information	Agent Information
Carried Hours	Hours Carried Over or Carried Over Hours
Planner	Calendar
Adherence (module name)	Performance (module name)
Agent Compliance	Agent Adherence
Real-Time Adherence	Real-Time Agent Adherence
Agents Logged In	Staffing
Current Status	Current State
Time in Noncompliance	Duration of Nonadherence
Compliance	Adherence
Print	Report

# Order of Migration

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

# Updating or Migrating to WFM 8.5

Use the appropriate procedure in this topic to update or migrate your existing Workforce Management 8.x, 7.x, or 6.5 database to 8.5. Use the roll back procedure if you need to *undo* your installation.

If you are migrating to a WFM release earlier than 8.5.0, find procedures in the *Genesys Migration Guide*.

## Tip

In these procedures, 8.5.x represents the particular release that you are updating to—for example, 8.5.0.

If you experience connectivity issues immediately after migration, see [Verify Your Connections](#).

If you need to undo your migration or update, see the [Procedure: Rolling Back the Installation](#) below.

## Procedure: Updating WFM 8.x or higher

### Start of Procedure

1. Back up your WFM 8.x database.
2. Ensure Configuration Server is running.
3. Stop and shut down the WFM applications and servers, including the servlet runner (WebSphere or Tomcat).
4. Use the following steps to delete WFM Web from Tomcat:
  - i. Delete the WFM .war file and the WFM directory in the \$CATALINA\_BASE\webapps folder.
  - ii. Delete the \$CATALINA\_BASE\work\Catalina\localhost\wfm folder.
5. If you are using Tomcat, see the [Configuring Tomcat for WFM Web](#) for instructions about where to place the wfm.war file. If you are using WebSphere, check the WebSphere documentation to find the correct directory.
6. Uninstall your existing WFM 8.x components using the Windows Add/Remove Programs function.
7. Configure and install the 8.5.0 version of the WFM components, following the procedure given in the [Installing Workforce Management](#). This includes importing the latest Application templates and creating new Application objects for all the WFM components.
8. Locate the WFM (8.5.0 update) version of the wfm.war file. The default installation directory is <Drive Letter>:\Program Files\GCTI\WFM85Web\WFM\_Web\_85x.  
You can verify that you have found the 8.5.x version of the wfm.war file by checking the version

number in the `ip_description.xml` file, located in the same directory.

9. Use the following steps to deploy Tomcat:

- i. Copy the `wfm.war` file and paste it into the `$CATALINA_BASE\webapps` folder.
- ii. Restart the servlet runner.

To correctly deploy WebSphere, consult the WebSphere documentation and see [Configuring WebSphere for WFM Web](#).

10. Start the WFM Database Utility. You can start it by selecting it from Start > Programs > Genesys Solutions > Workforce Management 8.5.x.
11. Select the Database Update radio button and then follow the instructions on the wizard screens that open.  
This updates your WFM database to the latest schema. All of your existing data is preserved.
12. Start all components and verify that all are working correctly.

End of Procedure

## Procedure: Updating WFM 7.x or higher

Start of Procedure

1. Back up your WFM 7.x database.
2. Ensure Configuration Server is running.
3. Stop and shut down the WFM applications and servers, including the servlet runner (WebSphere or Tomcat).
4. Use the following steps to delete WFM Web from Tomcat:
  - i. Delete the WFM `.war` file and the WFM directory in the `$CATALINA_BASE\webapps` folder.
  - ii. Delete the `$CATALINA_BASE\work\Catalina\localhost\wfm` folder.
5. If you are using Tomcat, see the [Configuring Tomcat for WFM Web](#) for instructions about where to place the `wfm.war` file. If you are using WebSphere, check the WebSphere documentation to find the correct directory.
6. Uninstall your existing WFM 7.x components using the Windows Add/Remove Programs function.
7. Configure and install the 8.5.0 version of the WFM components, following the procedure given in the [Installing Workforce Management](#). This includes importing the latest Application templates and creating new Application objects for all the WFM components.
8. Locate the WFM (8.5.0 update) version of the `wfm.war` file. The default installation directory is `<Drive Letter>:\Program Files\GCTI\WFM85\Web\WFM_Web_85x`.  
You can verify that you have found the 8.5.x version of the `wfm.war` file by checking the version number in the `ip_description.xml` file, located in the same directory.
9. Use the following steps to deploy Tomcat:
  - i. Copy the `wfm.war` file and paste it into the `$CATALINA_BASE\webapps` folder.

- ii. Restart the servlet runner.

To correctly deploy WebSphere, consult the WebSphere documentation and see [Configuring WebSphere for WFM Web](#).

10. Start the WFM Database Utility. You can start it by selecting it from Start > Programs > Genesys Solutions > Workforce Management 8.5.x.
11. Select the Database Update radio button and then follow the instructions on the wizard screens that open.  
This updates your WFM database to the latest schema. All of your existing data is preserved.
12. Start all components and verify that all are working correctly.

### End of Procedure

## Procedure: Migrating WFM 6.5

### Start of Procedure

1. Create a new database.  
This will be your WFM 8.5.x database and all your existing data will be migrated into it.
2. Create a Database Access Point (DAP) for your new database.
3. Import the WFM Application templates.
4. Create and configure the component Application objects using Configuration Manager or Genesys Administrator.
  - Find configuration instructions in the topic [WFM Configuration Options](#).
  - Some notes describing how WFM 8.5.x deployment differs from that of previous releases appear in [Changes in WFM Releases](#).

### Important

Starting in this release, the WFM Configuration Wizards are no longer supported and cannot be used to create the component Application objects. Therefore, you must create the Application objects manually. However, the Configuration Wizards are available if you are migrating to earlier WFM releases.

5. Install the WFM components from your software DVD. Installation instructions are found in the topic [Installing Workforce Management](#).

### Tip

To perform the data transfer from your previous database to the new one, you are required to install only the WFM Database Utility at this point. However, if you install all components now, you can start them as soon as your database migration is complete.

6. Stop all WFM 6.5 components, except WFM Data Aggregator, including all Windows-based and web clients. This ensures that no changes are introduced into the 6.5 database during migration.
7. Start the WFM Database Utility.
8. Select the Database Migration option.
9. Follow the steps presented in the Database Migration Wizard that opens. The WFM Database Utility creates and formats your new database, setting up the necessary tables, views, indexes, and so on.

### Tip

If you are migrating from WFM 6.5 and are using an Oracle database, make sure that the user who performs the migration has system privileges to create objects in the tablespace.

The WFM Database Utility prompts you to specify your WFM 6.5 Workforce Manager client application. This identifies the source 6.5 WFM database. To connect to the 6.5 data source, the computer on which the WFM Database Utility is running must have the appropriate data source name (DSN) configured, as specified in the WFM 6.5 Workforce Manager Application object.

The WFM Database Utility then copies your data from the source WFM 6.5 database to the newly created WFM 8.5.x database.

### Important

Depending on the size of your database, this might require a considerable period of time, up to 1 day for particularly large quantities of data.

10. Locate the WFM.war file and move it to your Tomcat or WebSphere directory, as appropriate. Perform any other Tomcat-specific or WebSphere-specific configuration as detailed in the topics [Configuring Tomcat for WFM Web](#) and [Configuring WebSphere for WFM Web](#).
11. Your migration should now be complete. Start your Workforce Management 8.5.x components.

End of Procedure

### Warning

If you collect performance data from your 8.5.x WFM Data Aggregator before migrating the performance data collected by your 6.5 Data Aggregator, the 6.5 performance data overwrites the 8.5.x data for the same time period.

## Procedure: Rolling Back the Installation

Start of Procedure

1. Stop Tomcat.
2. Remove the WFM Web Application from Tomcat.
3. Uninstall the new WFM components.
4. Reinstall your old WFM components.
5. Use the Database Utility to restore the data from your backed-up old database into an empty database.
6. Repeat for all servers running WFM Applications in this installation.

End of Procedure

# Two-Step Migration

If you have a large quantity of data to migrate from WFM 6.5 to WFM 8.5.x (in fact, to WFM 7.6 or higher), you might choose to do a two-step migration—also known as a large data set migration. Any migration interrupts performance data collection; using this procedure ensures only the smallest amount of data is lost.

During a two-step migration, the WFM 6.5 Data Aggregator continues to run, collecting performance data for the migration period. This performance data is then transferred into the 8.5.x database during a second migration. This second migration takes a relatively brief time, and results in a minimal amount of uncollected data.

## Warning

If you collect performance data from your 8.5.x WFM Data Aggregator before migrating the performance data collected by your 6.5 Data Aggregator, the 6.5 performance data overwrite the 8.5.x data for the same time period.

## Procedure: Two-Step Migration

**Purpose:** To minimize the loss of real-time data while migrating your database.

**Summary:** In this procedure, 8.x.x represents the particular release that you are migrating to—for example, 8.5.x.

**Prerequisites:** You are currently running WFM 6.5 and migrating to WFM 8.x.x.

### Start of Procedure

1. Shut down all WFM 6.5 components except Data Aggregator.
2. Perform the database migration as described in [Procedure: Updating WFM 8.x or higher](#) or [Procedure: Updating WFM 7.x or higher](#), depending on the release, to which you are updating.
3. Start the WFM 8.x.x Data Aggregator.  
This ensures that new performance data is captured and written to the 8.x.x database during the time it takes to perform the performance data migration.
4. Optional: Shut down WFM 6.5 Data Aggregator. Shutting down WFM 6.5 Data Aggregator will make migration of the remaining 6.5 data faster.
5. Shut down WFM 8.x.x Database Utility.
6. Create the AllowMigratePerformance option in the WFM 8.x.x Database Utility application in Genesys Configuration Manager.  
. (The WFM Database Utility uses the same Application object as the WFM Configuration Utility and is referred to as the Client Applicaton.)

7. Set the AllowMigratePerformance option value to 1.
8. Start your WFM 8.x.x Database Utility.
9. Select the Migrate Performance Data option in the WFM Database Utility and follow the instructions on the wizard screens to perform the migration.
10. Repeat the process for all computers that are to run a WFM server.

### Important

Remember to select the correct time period for performance data migration, because all the data in 8.5.x for that period will be overwritten. The selected period should start at the same moment that the first data migration started, and WFM 8.x.x Data Aggregator was started.

End of Procedure

# Troubleshooting Your Migration

If you have problems with your migration, check that you have followed all procedures correctly and that all components are running and connected. In addition, you might encounter the issues described in the following sections. If you experience other difficulties, contact [Genesys Customer Care](#).

- [Install the Microsoft ODBC Data Source](#)
- [Install the Microsoft .NET Framework](#)
- [Check Your Connections](#)

## Install the Microsoft ODBC Data Source

You may need to install the ODBC drivers before you can migrate your 6.5 database because 6.5 used the DSN and ODBC drivers. They are required to connect to the 6.5 database. To install the ODBC drivers, follow the instructions below.

### Procedure: Install the ODBC Drivers

#### Start of Procedure

1. Run the Microsoft Data Access (MDAC\_Typ) program.
2. Install both MDAC version 2.7 SP 1 or MDAC 2.8 and Jet version 4.0.  
You can download MDAC 2.7 SP 1 or MDAC 2.8 from Downloads on the Microsoft website at [www.microsoft.com](http://www.microsoft.com). Follow the download and installation instructions given on the website.
3. When you have finished installing MDAC and Jet, reboot your system.

#### End of Procedure

### Procedure: Select the ODBC Data Source

**Purpose:** To select and install the correct ODBC data source for your server.

**Prerequisites:** You installed MDAC and Jet.

#### Start of Procedure

1. After rebooting, select Start > Control Panel.

2. Select either ODBC Data Sources or 32-bit ODBC, whichever appears in the Control Panel.  
The ODBC Data Source Administrator dialog box appears.
3. Select the System DSN tab.
4. Click Add.  
The Create New Data Source dialog box appears.
5. Specify the name of the data source and the server name (the alias) that was entered in the Oracle SQL\*Net installation, or configure the Microsoft SQL connection properties as instructed in the Microsoft SQL Server DSN Configuration Wizard.
6. Click OK.  
The selected ODBC drivers are added to the list of installed System Data Sources.
7. Click OK.
8. Use the ODBC Data Source Administrator window to verify that the ODBC drivers were installed.

End of Procedure

## Install the Microsoft .NET Framework

The Microsoft .NET Framework Version 1.1 Redistributable Package is required to run the WFM Database Utility. If it is not installed already, install it. The Redistributable Package is available as a free download from the Microsoft website.

## Check Your Connections

If you experience connectivity issues immediately after migration, see a [list of actions](#) that you can take in response.