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# Workforce Management Migration Guide

Workforce Management 8.5.2

1/11/2022

# Table of Contents

<b>Workforce Management Migration</b>	<b>3</b>
<b>Migration Overview</b>	<b>4</b>
<b>Migration Prerequisites</b>	<b>6</b>
<b>New Features and Other Changes</b>	<b>8</b>
<b>Order of Migration</b>	<b>11</b>
<b>Migrating to WFM 8.5</b>	<b>14</b>
<b>Two-Step Migration</b>	<b>21</b>
<b>Troubleshooting Your Migration</b>	<b>23</b>

# 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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[Release Features and Changes](#)

[Migrating 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 procedures for configuring and installing Workforce Management (WFM) components is the same whether you are migrating, updating, or installing them for the first time. Be sure to use the same major version for all components, for example, all 8.5.2 components.

See [Installing Workforce Management](#) in the *Workforce Management Administrator's Guide* for configuration and installation procedures.

The procedures in this guide include only steps that are specific to migrating 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.

## Workforce Management versions

You can update to any WFM 8.5 release 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.x database, ensure all other WFM components are version 8.5.x.

## Using the correct procedure

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

When migrating from 6.x, you create a new database and transfer the data. When migrating from 8.x or 7.x, you perform the migration on the same database, by updating schema and data (if necessary).

### Important

If you are currently running a release of Workforce Management earlier than 6.5.201.00, the WFM Database Utility changes 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.

When migrating WFM 8.x or 7.x, complete the following steps in this order:

1. [Check Prerequisites](#)
2. [Plan for Down Time](#)
3. [Disable Access to WFM](#)

4. [Stop WFM Server Components](#)
5. [Back Up Your Database](#)
6. [Migrate WFM](#)
7. [Uninstall Old and Deploy New WFM Version](#)
8. [Verify Your Connections and Settings](#)

# Migration Prerequisites

Check the [Genesys Supported Operating Environment Reference Guide](#) for the supported platforms and databases, and the additional software required to operate WFM 8.5.x releases. Support for some platforms and databases might be discontinued in later WFM releases.

## Genesys Framework components

You must have deployed the following Genesys Management Framework components in your environment:

- Configuration Server
- Genesys Administrator Extension (GAX)
- Stat Server (optional)

For full interoperability with Workforce Management 8.5.x releases, use Genesys Framework 8.0 or later releases.

## Database sizing

The size requirement for the database during migration is approximately the same for 8.x and 7.x releases of WFM.

When migrating WFM 6.5 to 8.x or 7.x, 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.

Additionally, the WFM Database Utility is discontinued in 8.5.2 and replaced by the WFM Backup-Restore Utility (BRU). This could affect sizing requirements or there might be other hardware sizing requirements within your environment. Be sure to check the [Genesys Hardware Sizing Guide](#).

## Preparing for migration

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 [Release Features and Other Changes](#).
- The order in which you must 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](#).

# New Features and Other Changes

When new features or other changes are introduced in WFM releases, they can sometimes affect migration. Check what's new in each release, to ensure your migration is successful.

To find out what's new or changed in WFM 8.x releases, click the links [below](#). Changes that affect [WFM 7.x](#), and [WFM 6.5](#) migration are briefly described in the sections that follow.

## 8.x releases

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

## Migrating security settings to 8.x

If you are migrating from WFM 7.x, users are imported with the same security settings.

If the security settings have been divided into more specific functions, users who had access to the functionality in the prior version keep the same permissions. However, in some cases you might want to adjust the security settings to take advantage of the increased granularity.

For example, users who had permission to edit the Calendar now have permission to **Add/Edit/Delete** items and to **Prefer/Grant/Decline** items. You can change the security settings to allow one set of calendar modification settings but not the other.

## 7.x releases

WFM 8.5.x deployment—that is, configuration and installation of the components—is essentially the same as for version 7.x with one notable change, starting in 7.2, WFM Reports Server is no longer a separate installation package.

## 6.5 releases

If you are currently running WFM 6.5, deploying Workforce Management 8.5.x releases differs from your current version in two ways:



1. WFM Database Utility is discontinued in 8.5.2 and replaced by the WFM Backup-Restore Utility (BRU). Therefore, you cannot migrate directly from 6.5.x to 8.5.2. Instead, you must install the WFM 8.5.1 Database Utility and migrate the database to 8.5.2.
2. The installation of WFM components is now performed using separate installation packages rather than a single package.
3. 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 Application only.

When your database objects are migrated to a WFM 8.5.x 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 terms, 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

Previous term	Current term
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
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

Except where noted, the following tasks apply to all migration procedures:

## 1. Check prerequisites

Ensure all of the prerequisites required for the WFM version you are installing are met within your environment. See [Migration Prerequisites](#).

## 2. Plan for down time

The database upgrade might run a long time, so a period of down-time can occur. Take this into account when scheduling your database migration.

### Minimizing down time for 6.5 migration

If you are migrating a large 6.5 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.

## 3. Disable access to WFM Web

Disable access to WFM by either redirecting traffic to an "under construction" page or stop the WFM service.

## 4. Stop WFM Server components

See [Starting and Stopping WFM](#) in the *Workforce Management Administrator's Guide*.

## 5. Back up your database

Genesys recommends using a Database Management System (DBMS) to back up your database before beginning your migration or update.

Starting in 8.5.1, the WFM Backup-Restore Utility (BRU) is included in the WFM Database Utility (DBU) Installation Package (IP). Unlike the previously used WFM DBU backup file (.MDB format), which has a maximum 2 GB file size limit, the BRU uses a backup file format (.DB) that has no file size limit. For more information about the BRU, see [Using the Backup-Restore Utility](#) in the *Workforce Management Administrator's Guide*.

## 6. Migrate WFM

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

- [Procedure: Migrating WFM 8.x or higher \(Tomcat\)](#)
- [Procedure: Migrating WFM 8.x or higher \(WebSphere\)](#)
- [Procedure: Migrating the Database Using the BRU](#)
- [Procedure: Migrating WFM 7.x or higher \(Tomcat\)](#)
- [Procedure: Migrating WFM 7.x or higher \(WebSphere\)](#)
- [Procedure: Migrating WFM 6.5](#)

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.

## 7. Uninstall WFM and deploy the new version

See [Installing and Uninstalling WFM Components](#) in the *Workforce Management Administrator's Guide*.

## 8. Verify your connections and settings

If you experience any connectivity issues immediately after any migration or update, do the following:

1. Verify that you have the correct connections specified on the **Connections** tab of the **Application** object for each component.
2. In WFM Web's **Organization** module, update the following:
  - Data Aggregator **Name**, **Tenant**, **Password**, and **Time Profile** for each **Business Unit** object.
  - Data Aggregator **Name**, **Tenant**, **Password**, and **Time Profile** for each **Site** object.
  - WFM Server for each **Site** object.
  - Assign or unassign **Agent** (depending on login detected) for each **Site** object.
3. In WFM Web's **Users** module, update the **Time Zone**, **WFM Builder** object, and **Role** for each user.

# Migrating to WFM 8.5

Use the appropriate procedure in this topic to migrate your existing Workforce Management components to 8.5.x. Use the rollback procedure if you need to *undo* your installation.

If you are migrating to a WFM release earlier than 8.5.x, see the procedures in the *Genesys Migration Guide*.

In these procedures, 8.5.x represents the particular release that you are updating to—for example, 8.5.1.

If you experience connectivity issues immediately after migration, see [Verify your connections and settings](#). If you need to undo your migration or update, see the [Procedure: Rolling back the installation](#) below.

## Migrating WFM 8.x (Tomcat)

**Purpose:** To migrate your existing WFM 8.1.x components and update the WFM database to 8.5.x, together with Tomcat application server.

### Start of procedure

1. Back up your WFM 8.x database.  
**Genesys recommends using a Database Management System (DBMS) to back up your database. Alternatively, you can use the WFM Backup-Restore Utility for 8.5.2 and later releases.**
2. Ensure Genesys Administrator is running.
3. Stop and shut down the WFM applications and servers, including the Tomcat servlet runner.
4. Use the following steps to delete WFM Web from Tomcat:
  - Delete the WFM .war file and the WFM directory in the \$CATALINA\_BASE\webapps folder.
  - Delete the \$CATALINA\_BASE\work\Catalina\localhost\wfm folder.
5. See the [Configuring Tomcat for WFM Web](#) for instructions about where to place the wfm.war file.
6. Uninstall your existing WFM 8.x components using the Windows **Add/Remove Programs** function.
7. Configure and install the 8.5.x version of the WFM components, following the procedure given in the [Installing Workforce Management](#). This step includes importing the latest Application templates and creating new Application objects for all the WFM components.
8. Locate the WFM (8.5.x 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:

- Copy the wfm.war file and paste it into the \$CATALINA\_BASE\webapps folder.
- Restart the servlet runner.

10. If you are migrating to 8.5.1:

- Start the WFM Database Utility by selecting it from **Start > Programs > Genesys Solutions > Workforce Management 8.5.x**.
- Select the Database Update radio button and then follow the instructions on the wizard screens. **This action updates your WFM database to the latest schema and preserves your existing data.**

11. If you are migrating to 8.5.2, follow the [Procedure: Migrating the Database Using the BRU](#).

12. Start all components and verify that they are working correctly.

### Important

WFM Database Utility is discontinued in 8.5.2 and replaced by the WFM Backup-Restore Utility (BRU).

### End of procedure

## Migrating WFM 8.x (WebSphere)

**Purpose:** To migrate your existing WFM 8.1.x components and update the WFM database to 8.5.0, together with WebSphere.

### Important

This procedure is not applicable if you are migrating to WFM 8.5.1 or later versions. Starting in 8.5.1, WebSphere is no longer supported.

### Start of procedure

1. Back up your WFM 8.x database.  
**Genesys recommends using a Database Management System (DBMS) to back up your database.**
2. Ensure Configuration Server is running.
3. Stop and shut down the WFM applications and servers, including the WebSphere servlet runner.
4. For instructions about where to find the correct directory in which to place the wfm.war file, check the WebSphere documentation.
5. Uninstall your existing WFM 8.x components using the Windows Add/Remove Programs function.

6. 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.
7. 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\_850  
**You can verify that you have found the 8.5.0 version of the wfm.war file by checking the version number in the ip\_description.xml file, located in the same directory.**
8. To correctly deploy WebSphere, consult the WebSphere documentation and see [Configuring WebSphere for WFM Web](#).
9. If you are migrating to 8.5.0:
  - Start the WFM Database Utility by selecting it from **Start > Programs > Genesys Solutions > Workforce Management 8.5.0**.
  - Select the Database Update radio button and then follow the instructions on the wizard screens. **This action updates your WFM database to the latest schema and preserves your existing data.**
10. Start all components and verify that they are working correctly.

### End of procedure

## Migrating the database using the BRU

**Purpose:** To update or migrate the WFM database (or Extract, Transform, and Load [ETL] database) schema, by using the WFM Backup-Restore Utility (WFMBRU.exe) that is included in the WFM Database Utility Installation Package (IP).

You can also use the script in the following procedure to create a new database.

### Start of procedure

1. Run one of the following scripts (depending on the type of database you are using):
  - To update or migrate an exiting WFM database schema (or create a new one):
    - **MSSQL:**  
WFMBRU.exe -UPDATE -DB "mssql;<server>;<WFM database>;<user>;<password>" -SCRIPT "<script path>\wfm7\_MSQL.sql"
    - **ORACLE:**  
WFMBRU.exe -UPDATE -DB "oracle;<WFM database>;<user>;<password>" -SCRIPT "<script path>\wfm7\_ORA.sql"
  - To update or migrate an exiting WFM ETL database schema (or create a new one):
    - **MSSQL:**  
WFMBRU.exe -UPDATE -DB "mssql;<server>;<ETL database>;<user>;<password>" -SCRIPT "<script path>\WFM\_ETL\_MSQL.sql"
    - **ORACLE:**  
WFMBRU.exe -UPDATE -DB "oracle;<ETL database>;<user>;<password>" -SCRIPT "<script path>\WFM\_ETL\_ORA.sql"



**If you are using the 64-bit Oracle client, use WFMBRUx64.exe (not WFMBRU.exe, which is used for the 32-bit Oracle client). If you are using Oracle Database Server, use the 64-bit Oracle client for the WFMBRU.exe application.**

### Important

The WFM 8.5.2 IP does not contain the WFMBRUx64.exe. Only WFMBRU.exe is available for this version and it uses only the 64-bit Oracle client.

## End of procedure

## Migrating WFM 7.x or higher (Tomcat)

**Purpose:** To migrate your existing WFM 7.x or later components and update the WFM database to 8.5.x, together with Tomcat.

### Start of procedure

1. Back up your WFM 7.x or later database.  
**Genesys recommends using a Database Management System (DBMS) to back up your database. Alternatively, you can use the WFM Backup-Restore Utility for 8.5.2 and later releases.**
2. Ensure Configuration Server is running.
3. Stop and shut down the WFM applications and servers, including the Tomcat servlet runner.
4. Use the following steps to delete WFM Web from Tomcat:
  - Delete the WFM .war file and the WFM directory in the \$CATALINA\_BASE\webapps folder.
  - Delete the \$CATALINA\_BASE\work\Catalina\localhost\wfm folder.
5. See the [Configuring Tomcat for WFM Web](#) for instructions about where to place the wfm.war file.
6. Uninstall your existing WFM 7.x or later components using the Windows Add/Remove Programs function.
7. Configure and install the 8.5.x version of the WFM components, following the procedure given in the [Installing Workforce Management](#). This step includes importing the latest Application templates and creating new Application objects for all the WFM components.
8. Locate the WFM (8.5.x 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:
  - Copy the wfm.war file and paste it into the \$CATALINA\_BASE\webapps folder.
  - Restart the servlet runner.
10. If you are migrating to 8.5.1:

- Start the WFM Database Utility by selecting it from **Start > Programs > Genesys Solutions > Workforce Management 8.5.x**.
- Select the Database Update radio button and then follow the instructions on the wizard screens. **This updates your WFM database to the latest schema and preserves your existing data.**

11. If you are migrating to 8.5.2, follow the [Migrating the Database Using the BRU](#).

12. Start all components and verify that they are working correctly.

### Important

WFM Database Utility is discontinued in 8.5.2 and replaced by the WFM Backup-Restore Utility (BRU).

### End of procedure

## Migrating WFM 7.x or higher (WebSphere)

**Purpose:** To migrate your existing WFM 7.x or higher components and update the WFM database to 8.5.0, together with WebSphere.

### Important

This procedure is not applicable if you are migrating to WFM 8.5.1 or later versions. Starting in 8.5.1, WebSphere is no longer supported.

### Start of procedure

1. Back up your WFM 7.x or later database.  
**Genesys recommends using a Database Management System (DBMS) to back up your database.**
2. Ensure Configuration Server is running.
3. Stop and shut down the WFM applications and servers, including the WebSphere servlet runner.
4. For instructions about where to find the correct directory, in which to place the wfm.war file, check the WebSphere documentation to find the correct directory.
5. Uninstall your existing WFM 7.x or later components using the Windows **Add/Remove Programs** function.
6. Configure and install the 8.5.0 version of the WFM components, following the procedure given in the [Installing Workforce Management](#). This step includes importing the latest Application templates and creating new Application objects for all the WFM components.
7. 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\_850*.

**You can verify that you have found the 8.5.0 version of the wfm.war file by checking the version number in the ip\_description.xml file, located in the same directory. To correctly deploy WebSphere, consult the WebSphere documentation and see [Configuring WebSphere for WFM Web](#).**

8. If you are migrating to 8.5.0:
  - Start the WFM Database Utility by selecting it from **Start > Programs > Genesys Solutions > Workforce Management 8.5.0**.
  - Select the **Database Update** radio button and then follow the instructions on the wizard screens. **This action updates your WFM database to the latest schema and preserves your existing data.**
9. Start all components and verify that they are working correctly.

### End of procedure

## Migrating WFM 6.5

### Start of procedure

1. Create a database.  
**This will be your WFM 8.5.x database and all your existing data will be migrated into it. Alternatively, you can minimize down time by using the [Procedure: Two-Step Migration](#) to create WFM 7.X database, and then migrate to 8.5.x.**
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 [Workforce Management Options Reference](#). Some notes describing how WFM 8.5.x deployment differs from that of previous releases appear in [Changes in WFM Releases](#). 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 [Installing Workforce Management](#).
6. 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.
7. 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.
8. If you opted to use [Two-step migration](#) in step 1 of this procedure, omit steps 10-12 below. Instead, install an 8.x version of WFM Database Utility and update the WFM Database to the required version after you complete the procedure.
9. Start the WFM Database Utility.

### 10. Select **Database Migration**.

### 11. Follow the steps presented in the Database Migration Wizard. The WFM Database Utility creates and formats your new database, setting up the necessary tables, views, indexes, and so on.

- 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, ensure the computer on which the WFM Database Utility is running has 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. Depending on the size of your database, this might require a considerable period of time, up to one day for particularly large quantities of data.  
**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.**

### 12. 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](#).

### 13. Your migration is now complete. Start your Workforce Management 8.5.x components. **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.**

### End of procedure

## Rolling back the installation

### Start of procedure

1. Stop and close all WFM components and applications.
2. Remove the WFM Web Application from Tomcat or WebSphere, by using one of these methods:
  - Stop the servlet runner and manually delete the WFM Web Application and associated files.
  - Use the servlet runner manager (Tomcat or WebSphere) to remove the WFM Web Application.
3. Uninstall all new WFM components (servers and applications) in your WFM deployment.
4. Restore the WFM database to the previous version.
5. Install the old WFM components. Install the old WFM components (servers and applications) from your software DVD. Installation instructions are found in [Installing Workforce Management](#).
6. Deploy the WFM Web Application under Tomcat or WebSphere.
7. [Verify Your Connections and Settings](#).

### End of procedure

## Two-Step Migration

If you have a large quantity of data to migrate from WFM 6.5 to WFM 7.6 or later, 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 that only the smallest amount of data is lost.

During a two-step migration, you first migrate from 6.5 to 7.6 without performance data (see the **AllowMigratePerformance** configuration option in the **Options** section of the WFM Client Application). The WFM 7.6 Data Aggregator continues to run, collecting performance data for the migration period.

Next, migrate the performance data from 6.5 to 7.6. Performance data that is collected by WFM 7.6 Data Aggregator is present in the 7.6 database at the same time. The second migration of performance data takes a relatively short amount of time and results in a minimal amount of uncollected data. You can only update the database to an 8.x version after completing the second migration.

### Warning

Do not collect performance data from your 7.6 WFM Data Aggregator before migrating the performance data collected by your 6.5 Data Aggregator. Otherwise, the 6.5 performance data will overwrite the 7.6 data for the same time period.

## Two-step migration

**Purpose:** To minimize the loss of real-time data while migrating 6.5 your database.

**Prerequisites:** You are currently running WFM 6.5 and migrating to WFM 7.6.x.

### Start of procedure

1. Shut down all WFM 6.5 components except Data Aggregator.
2. In Genesys Administrator, create the **AllowMigratePerformance** configuration option in the WFM 7.6.x **WFM Client Application**.
3. Set the **AllowMigratePerformance** option value to 0.
4. Start the 7.6 WFM Database Utility.
5. After it is fully operational, select **Migrate Database** and follow the instructions in the wizard to perform the migration (from the 6.5 WFM Database).
6. Start the WFM 7.6.x Data Aggregator.  
**This action ensures that new performance data is captured and written to the 7.6.x**

**database during the time it takes to perform the performance data migration.**

7. Optional: Shut down WFM 6.5 Data Aggregator to make migration of the remaining 6.5 data faster.
8. Shut down WFM 7.6.x Database Utility.
9. In Genesys Administrator, go to the **WFM Client Application** properties, and set the **AllowMigratePerformance** option value to 1.
10. Start your WFM 7.6.x Database Utility.
11. Select the Migrate Performance Data option in the WFM Database Utility and follow the instructions in the wizard to perform the migration.

**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. If you experience other difficulties, contact [Genesys Customer Care](#).

## Check Your Connections

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