Workforce Management Migration Guide

Order of Migration

12/19/2025

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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.