Workforce Management Migration Guide

Updating or Migrating to WFM 8.5

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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