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# Workforce Management Migration Guide

Workforce Management 8.5.1

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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- [Preparing for Migration](#)
- [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

Configuring and installing Workforce Management (WFM) components is the same whether you are migrating, updating, or installing them for the first time, but you must be sure to use the same version for all components. (For example, all 8.5.1 components.) However, there are some differences when migrating the database. Therefore, some 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 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.

## Migrate versus Update

You use different procedures when you migrate 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.

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

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 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.

## Genesys Framework Components

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

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

## Framework Version

For full interoperability with Workforce Management 8.5.x releases, use Genesys Framework 7.6 or later releases.

## 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 8.5.1 database, ensure all other WFM components are version 8.5.1.

### 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.x is approximately the same as for all 8.x release of WFM.
Updating WFM 7.x	The database size required for WFM 8.5.x is approximately the same as for the 7.x release of WFM.

Release	Sizing requirements
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 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

Changes in WFM 7.x, and 6.5 releases are briefly described below. For WFM 8.x releases, click the links below to find changes and new feature descriptions.

### 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](#).

### Migrating Security Settings to 8.x

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

If the security settings have been broken down 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 Changes

WFM 8.5.x 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 8.5.x 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 8.5.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, 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



Previous term	Current term
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
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. 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 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.

### Tip

You cannot use two-step migration for 8.x releases.

## 2. Back Up Your Database

Genesys recommends using a Database Management System (DBMS) to backup 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

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 migrating to WFM 8.5.x:

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

## 4. Verify Your Connections and Settings

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

1. Verify that you have the correct connections specified on the **Connections** tabs of the **Application** objects for each component.
2. In WFM Web's **Organization** module, update:
  - 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:
  - **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 roll back procedure if you need to *undo* your installation.

If you are migrating to a WFM release earlier than 8.5.x, 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, 8.5.1.

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.

## Procedure: 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.

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

### Tip

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.
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. Start the WFM Database Utility. You can start it by selecting it from Start > Programs > Genesys Solutions > Workforce Management 8.5.0.
10. 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.
11. Start all components and verify that all are working correctly.

End of Procedure

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

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

Start of Procedure

1. Back up your WFM 7.x or higher database.
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:
  - 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. 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 higher 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 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:
  - i. Copy the wfm.war file and paste it into the \$CATALINA\_BASE\webapps folder.
  - ii. Restart the servlet runner.
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 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.

### Tip

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 higher 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 higher 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\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.
8. To correctly deploy WebSphere, consult the WebSphere documentation and see [Configuring WebSphere for WFM Web](#).
9. Start the WFM Database Utility. You can start it by selecting it from Start > Programs > Genesys Solutions > Workforce Management 8.5.0.
10. 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.
11. 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.

### Tip

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 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 [\[\[Documentation:WM:Admin:Installation:8.5.1|Installing Workforce Management\]](#).

### 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.

### Tip

If you opted to use **Procedure: Two-Step Migration** in step 1 of this procedure, omit steps 7-9 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.

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 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.
- Uninstall all new WFM components (servers and applications) in your WFM deployment.
  - Restore the WFM database to the previous version.
  - 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](#).
  - Deploy the WFM Web Application under Tomcat or WebSphere.
  - [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 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, 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, you will 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. Only after completing the second migration, can you update the database to an 8.x version.

### 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.

## Procedure: 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 **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 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.

## Two-Step Migration

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7. 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.
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 on the wizard screens 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. 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.