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Workforce Management Migration Guide

Preparing to Migrate WFM

5/6/2025

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

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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