Workforce Management Migration Guide

Migration Overview

5/6/2025

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