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Workforce Management Migration Guide

Migrating to WFM 8.5

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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 rollback procedure if you need to *undo* your installation.

If you are migrating to a WFM release earlier than 8.5.x, see the procedures in the *Genesys Migration Guide*.

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.

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 application server.

Start of procedure

1. Back up your WFM 8.x database.
Genesys recommends using a Database Management System (DBMS) to back up your database. Alternatively, you can use the WFM Backup-Restore Utility for 8.5.2 and later releases.
2. Ensure Genesys Administrator 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:
 - Delete the WFM .war file and the WFM directory in the \$CATALINA_BASE\webapps folder.
 - 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 step 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:

- Copy the wfm.war file and paste it into the \$CATALINA_BASE\webapps folder.
- Restart the servlet runner.

10. If you are migrating to 8.5.1:

- Start the WFM Database Utility by selecting it from **Start > Programs > Genesys Solutions > Workforce Management 8.5.x**.
- Select the Database Update radio button and then follow the instructions on the wizard screens. **This action updates your WFM database to the latest schema and preserves your existing data.**

11. If you are migrating to 8.5.2, follow the [Procedure: Migrating the Database Using the BRU](#).

12. Start all components and verify that they are working correctly.

Important

WFM Database Utility is discontinued in 8.5.2 and replaced by the WFM Backup-Restore Utility (BRU).

End of 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.

Important

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.
Genesys recommends using a Database Management System (DBMS) to back up your 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. If you are migrating to 8.5.0:
 - Start the WFM Database Utility by selecting it from **Start > Programs > Genesys Solutions > Workforce Management 8.5.0**.
 - Select the Database Update radio button and then follow the instructions on the wizard screens. **This action updates your WFM database to the latest schema and preserves your existing data.**
10. Start all components and verify that they are working correctly.

End of procedure

Migrating the database using the BRU

Purpose: To update or migrate the WFM database (or Extract, Transform, and Load [ETL] database) schema, by using the WFM Backup-Restore Utility (WFMBRU.exe) that is included in the WFM Database Utility Installation Package (IP).

You can also use the script in the following procedure to create a new database.

Start of procedure

1. Run one of the following scripts (depending on the type of database you are using):
 - To update or migrate an exiting WFM database schema (or create a new one):
 - **MSSQL:**
WFMBRU.exe -UPDATE -DB "mssql;<server>;<WFM database>;<user>;<password>" -SCRIPT "<script path>\wfm7_MSQL.sql"
 - **ORACLE:**
WFMBRU.exe -UPDATE -DB "oracle;<WFM database>;<user>;<password>" -SCRIPT "<script path>\wfm7_ORA.sql"
 - To update or migrate an exiting WFM ETL database schema (or create a new one):
 - **MSSQL:**
WFMBRU.exe -UPDATE -DB "mssql;<server>;<ETL database>;<user>;<password>" -SCRIPT "<script path>\WFM_ETL_MSQL.sql"
 - **ORACLE:**
WFMBRU.exe -UPDATE -DB "oracle;<ETL database>;<user>;<password>" -SCRIPT "<script path>\WFM_ETL_ORA.sql"

If you are using the 64-bit Oracle client, use WFMBRUx64.exe (not WFMBRU.exe, which is used for the 32-bit Oracle client). If you are using Oracle Database Server, use the 64-bit Oracle client for the WFMBRU.exe application.

Important

The WFM 8.5.2 IP does not contain the WFMBRUx64.exe. Only WFMBRU.exe is available for this version and it uses only the 64-bit Oracle client.

End of procedure

Migrating WFM 7.x or higher (Tomcat)

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

Start of procedure

1. Back up your WFM 7.x or later database.
Genesys recommends using a Database Management System (DBMS) to back up your database. Alternatively, you can use the WFM Backup-Restore Utility for 8.5.2 and later releases.
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:
 - Delete the WFM .war file and the WFM directory in the \$CATALINA_BASE\webapps folder.
 - 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 later 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 step 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:
 - Copy the wfm.war file and paste it into the \$CATALINA_BASE\webapps folder.
 - Restart the servlet runner.
10. If you are migrating to 8.5.1:

- Start the WFM Database Utility by selecting it from **Start > Programs > Genesys Solutions > Workforce Management 8.5.x**.
- Select the Database Update radio button and then follow the instructions on the wizard screens. **This updates your WFM database to the latest schema and preserves your existing data.**

11. If you are migrating to 8.5.2, follow the [Migrating the Database Using the BRU](#).
12. Start all components and verify that they are working correctly.

Important

WFM Database Utility is discontinued in 8.5.2 and replaced by the WFM Backup-Restore Utility (BRU).

End of 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.

Important

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 later database.
Genesys recommends using a Database Management System (DBMS) to back up your 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 later 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 step 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. To correctly deploy WebSphere, consult the WebSphere documentation and see [Configuring WebSphere for WFM Web](#).

8. If you are migrating to 8.5.0:
 - Start the WFM Database Utility by selecting it from **Start > Programs > Genesys Solutions > Workforce Management 8.5.0**.
 - Select the **Database Update** radio button and then follow the instructions on the wizard screens. **This action updates your WFM database to the latest schema and preserves your existing data.**
9. Start all components and verify that they are working correctly.

End of procedure

Migrating WFM 6.5

Start of procedure

1. Create a database.
This will be your WFM 8.5.x database and all your existing data will be migrated into it. 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 [Workforce Management Options Reference](#). Some notes describing how WFM 8.5.x deployment differs from that of previous releases appear in [Changes in WFM Releases](#). 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 [Installing Workforce Management](#).
6. 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.
7. 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.
8. If you opted to use [Two-step migration](#) in step 1 of this procedure, omit steps 10-12 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.
9. Start the WFM Database Utility.

10. Select **Database Migration**.

11. Follow the steps presented in the Database Migration Wizard. The WFM Database Utility creates and formats your new database, setting up the necessary tables, views, indexes, and so on.

- 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, ensure the computer on which the WFM Database Utility is running has 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. Depending on the size of your database, this might require a considerable period of time, up to one day for particularly large quantities of data.

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.

12. 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](#).

13. Your migration is now complete. Start your Workforce Management 8.5.x components.

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.

End of 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.
3. Uninstall all new WFM components (servers and applications) in your WFM deployment.
4. Restore the WFM database to the previous version.
5. 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](#).
6. Deploy the WFM Web Application under Tomcat or WebSphere.
7. [Verify Your Connections and Settings](#).

End of procedure