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Workforce Management Migration Guide

New Features and Other Changes

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Contents

- [1 New Features and Other Changes](#)
 - [1.1 8.x releases](#)
 - [1.2 7.x releases](#)
 - [1.3 6.5 releases](#)

New Features and Other Changes

When new features or other changes are introduced in WFM releases, they can sometimes affect migration. Check what's new in each release, to ensure your migration is successful.

To find out what's new or changed in WFM 8.x releases, click the links [below](#). Changes that affect [WFM 7.x](#), and [WFM 6.5](#) migration are briefly described in the sections that follow.

8.x releases

- 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 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.

If the security settings have been divided 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 releases

WFM 8.5.x deployment—that is, configuration and installation of the components—is essentially the same as for version 7.x with one notable change, starting in 7.2, WFM Reports Server is no longer a separate installation package.

6.5 releases

If you are currently running WFM 6.5, deploying Workforce Management 8.5.x releases differs from your current version in two ways:

1. WFM Database Utility is discontinued in 8.5.2 and replaced by the WFM Backup-Restore Utility (BRU). Therefore, you cannot migrate directly from 6.5.x to 8.5.2. Instead, you must install the WFM 8.5.1 Database Utility and migrate the database to 8.5.2.
2. The installation of WFM components is now performed using separate installation packages rather than a single package.
3. 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 Application 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 terms, 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
PABX Time Offset Information	Daylight Saving Time Information
Virtual Activity	Multi-Site Activity
Scheduled Agent's State	Schedule State Group

Previous term	Current term
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