

## **GENESYS**

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## Genesys Skills Management Automated Install and Upgrade Guide

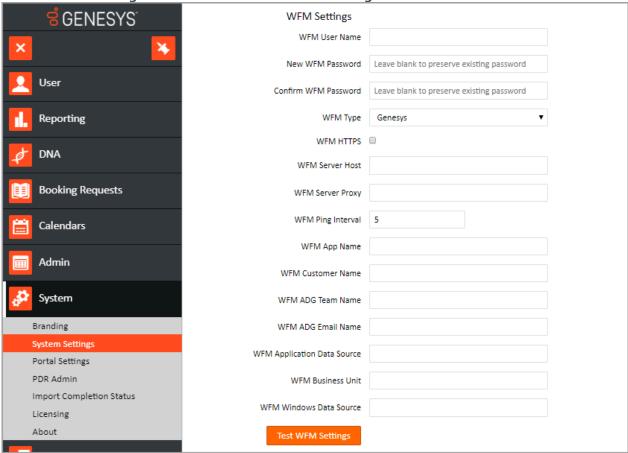
Configuring WFM Settings

## Configuring WFM Settings

You must connect OrgData to the WFM solution. You can configure WFM settings from the Skills Management web portal by completing the following procedure:

1. Navigate to **System > System Settings** page.

2. Click **General Settings** tab and scroll down to **WFM Settings** section.



- 3. Specify the WFM values in the below fields:
  - WFM User Name Enter the user name of the WFM account that Skills Management will use to connect to the WFM solution.
  - **New WFM Password** Enter the WFM user's password.
  - Confirm WFM Password Re-enter the WFM user's password.
  - **WFM Type** From the drop down, select the WFM provider that you are using.
    - Genesys
    - Teleopti

- IEX (NICE)
- WFM HTTPS Check, if the WFM API is running over HTTPS.
- **WFM Server Host** Enter the hostname / URL of the WFM solution. For Genesys WFM the port will need to be included i.e. wfm.genesyslab.com:5007
- WFM Server Proxy If using a proxy please enter the Proxy server details.
- **WFM Ping Interval** By default, this is set as 5. You can change this only on the advice of the Genesys Care Team.
- WFM App Name This field is specific to Teleopti WFM users.
- **WFM Customer Name** This field is specific to NICE IEX users.
- WFM ADG Team Name Please enter the IEX ADG that is used to identify Team Names.
- WFM ADG Email Name Please enter the IEX ADG that is used to store Email addresses.
- **WFM Application Data Source** As a Teleopti WFM user enter 1 if the username provided is an application login ID.
- WFM Business Unit As a Teleopti WFM User enter the GUID of the Business Unit.
- WFM Windows Data Source As a Teleopti WFM user enter 1 if the username provided is a Windows login ID.

## **Important**

Before saving the WFM settings click the **Test WFM Settings** button. If successful a green **WFM Settings Test Successful** message will be displayed.

4. Scroll down to the bottom of the General Settings tab and click "Save Changes".