# Genesys Skills Management Automated Install and Upgrade Guide

Configuring WFM Settings

4/4/2025

# 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".