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Genesys Skills Management Automated Install and Upgrade Guide

Configuring WFM Settings

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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.

The screenshot displays the Genesys Skills Management web portal interface. On the left, a dark sidebar contains the 'System' menu, which is expanded to show 'System Settings' as the selected option. The main content area, titled 'WFM Settings', contains a form with the following fields and controls:

- WFM User Name: Text input field.
- New WFM Password: Text input field with a hint: "Leave blank to preserve existing password".
- Confirm WFM Password: Text input field with a hint: "Leave blank to preserve existing password".
- WFM Type: Dropdown menu with 'Genesys' selected.
- WFM HTTPS: Unchecked checkbox.
- WFM Server Host: Text input field.
- WFM Server Proxy: Text input field.
- WFM Ping Interval: Text input field with the value '5'.
- WFM App Name: Text input field.
- WFM Customer Name: Text input field.
- WFM ADG Team Name: Text input field.
- WFM ADG Email Name: Text input field.
- WFM Application Data Source: Text input field.
- WFM Business Unit: Text input field.
- WFM Windows Data Source: Text input field.

A 'Test WFM Settings' button is located at the bottom right of the form.

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”.