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Genesys Skills Management Automated Install and Upgrade Guide

Configuring WFM Settings

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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.

The screenshot displays the Genesys Skills Management web portal. On the left is a dark sidebar with the Genesys logo at the top. Below the logo are several menu items with icons: 'User' (person icon), 'Reporting' (bar chart icon), 'DNA' (DNA helix icon), 'Booking Requests' (calendar icon), 'Calendars' (calendar icon), 'Admin' (calendar icon), and 'System' (gear icon). The 'System' menu is expanded, showing sub-items: 'Branding', 'System Settings' (highlighted in orange), 'Portal Settings', 'PDR Admin', 'Import Completion Status', 'Licensing', and 'About'. The main content area is titled 'WFM Settings'. It contains several input fields: 'WFM User Name' (text box), 'New WFM Password' (text box with placeholder 'Leave blank to preserve existing password'), 'Confirm WFM Password' (text box with placeholder 'Leave blank to preserve existing password'), 'WFM Type' (dropdown menu showing 'Genesys'), 'WFM HTTPS' (checkbox), 'WFM Server Host' (text box), 'WFM Server Proxy' (text box), 'WFM Ping Interval' (text box with value '5'), 'WFM App Name' (text box), 'WFM Customer Name' (text box), 'WFM ADG Team Name' (text box), 'WFM ADG Email Name' (text box), 'WFM Application Data Source' (text box), 'WFM Business Unit' (text box), and 'WFM Windows Data Source' (text box). At the bottom of the settings section is an orange button labeled 'Test WFM Settings'.

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”.