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Task Management using Global Task List

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Task Management using Global Task List

These pages describe how to monitor and manage with intelligent Workload Distribution's (iWD) Global Task List.

<tabber> Task Management & Monitoring Summary=

Summary

Task Management

Task Management allows monitoring and management of tasks that are being processed by iWD:

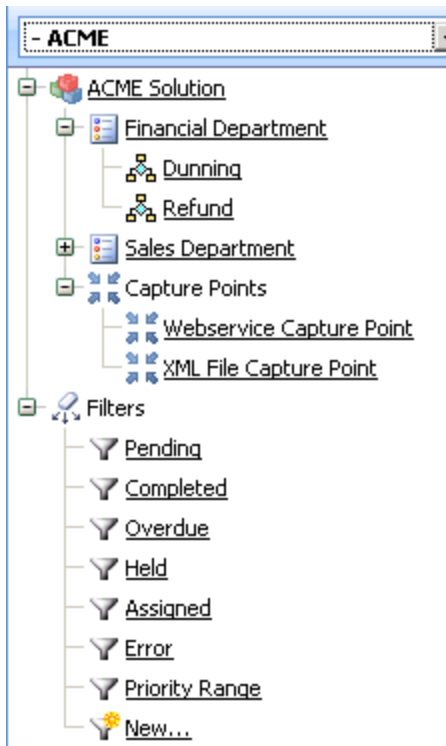
- Use Task Monitoring to view a list of tasks that are associated with different business contexts, as well as details and history for each task.
- Use Task Operation to override configured task-handling logic by performing a manual task operations on specific tasks such as Hold, Resume, Cancel, and Modify.
- Use Filters to refine the list of tasks that are available in Task Monitoring by defining filter criteria and visible task attributes (columns).

Task Monitoring

Task Monitoring allows you to view a current list of tasks for a number of business contexts:

- Solution
- Department
- Process
- Capture Point

All of the available contexts are displayed in the navigation tree. When a context is selected, the corresponding list of tasks is displayed in the Global Task List.



-| Global Task List=

Global Task List

The Task List displays a list of tasks for the selected business context.

The screenshot shows the 'Global Task List' interface. On the left is a tree view for the ACME Solution. The main area displays a table of tasks with columns: ID, Capture ID, Status, Icon, Media Type, Process, Created D/T, Business Value, Priority, and Task Due D/T. The table contains five rows of task data. Below the table are buttons for Refresh, Hold, Resume, Cancel, Modify, and Export to XML. A 'Task Details' section is visible at the bottom, showing attributes and history for the selected task (ID: 01R1AN2FPTXN000T).

ID	Capture ID	Status	Icon	Media Type	Process	Created D/T	Business Value	Priority	Task Due D/T
01R0X82FPTX28002	444	Queued		workitem	Refund	May 18, 2012 2:16 PM	100	2850	May 18, 2012 2:22 PM
01R0X82FPTX28001	458	Canceled		workitem	Dunning	May 18, 2012 2:16 PM	80	2830	May 18, 2012 2:26 PM
01R1AN2FPTXN000T	50	Queued		workitem	Order	May 18, 2012 1:21 PM	910	1689	May 18, 2012 1:24 PM
01R0X82FPTX28003	2348	Queued		workitem	Order	May 18, 2012 2:16 PM	910	1639	May 18, 2012 2:19 PM
01R1AN2FPTXN000M	10	Queued		workitem	Service Request	May 18, 2012 1:21 PM	655	1416	May 18, 2012 1:31 PM

Task Details

Attributes

- ID: 01R1AN2FPTXN000T
- Media Type: workitem
- Department: Sales Department
- Category: Order
- Capture ID: 50
- Channel: webform
- Age: 3d 2h 52m 19s
- Business Value: 910
- Priority: 1689

History

- Status: Queued
- Tenant: ACME
- Process: Order
- Capture Point: Webservice Capture Point
- Created D/T: May 18, 2012 1:21 PM
- Distribution Point:
- Activation D/T:
- Task Due D/T: May 18, 2012 1:24 PM
- Reprioritization D/T: May 21, 2012 4:15 PM

In addition, custom attributes can be made available in the list of Advanced Filters.

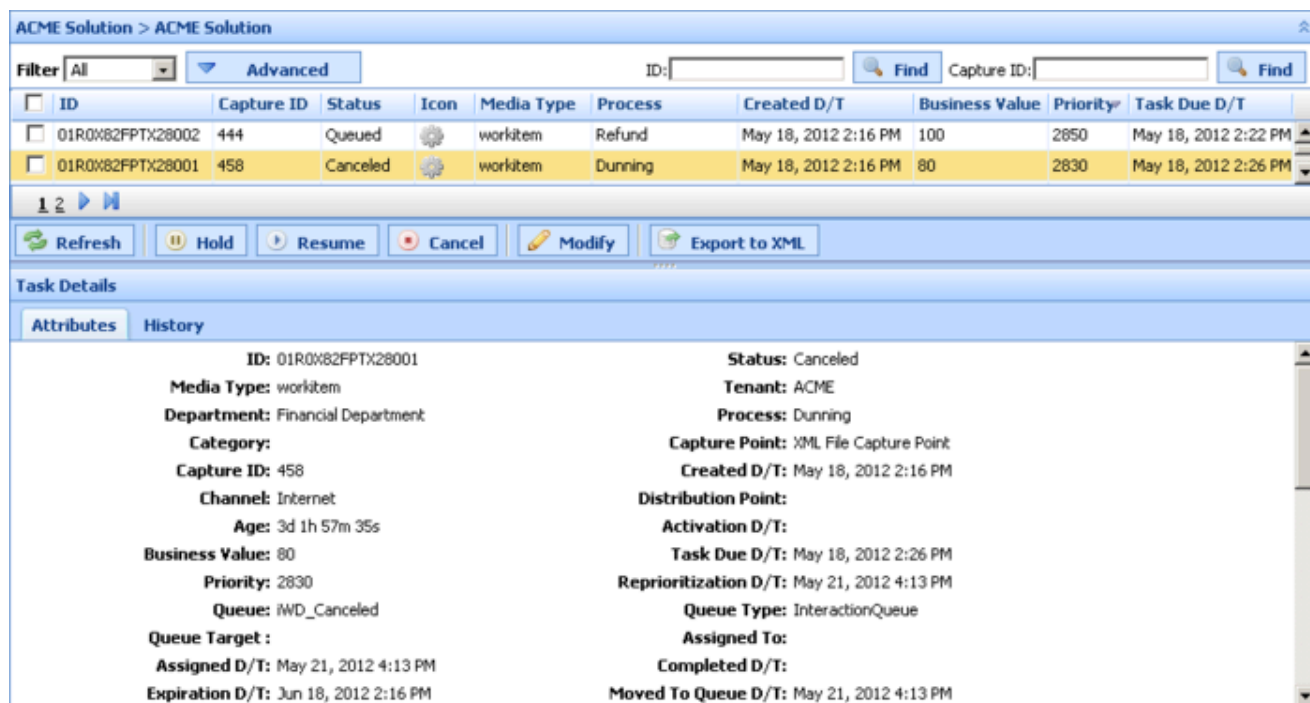
Global Task List Actions

Attribute/Action	Description
Filter	Refines the Global Task List and displayed columns, based on the selected filter. For more information on filters, see the Filters tab on this page.
Advanced Filters	Advanced filters let you further narrow down the tasks that are listed in the Global Task List. Up to three additional conditions can be added to a selected filter. All of the task's core and extended attributes are available. To add an advanced filter, select the attribute name from the drop down list. Advanced filters cannot be saved and are retained only during an iWD Manager session.
Refresh	Refreshes the Global Task List.
Hold, Resume, Cancel, Modify, Export to XML	Performs the corresponding operation on the selected task. The task is selected if the first column of the task row in the list is checked. To select/deselect all tasks in the list, click the first column in the table header. If no task is checked, but task details are opened for some task, this task is also considered to be selected. For more information on specific operations, see the Task Operations tab on this page.
Configuration	Opens the configuration view of the current business context. This action can be restricted by a security policy.
Click task row	Displays task details. The selected row is marked.
Tooltips	Displays the whole value in a tooltip when you hover the mouse over the value in any column of the Global Task List.

|< Task Details=

Task Details

When a task is selected from the Global Task List, its attributes will be displayed.



Attributes are broken down into three sections:

- Top—Core task attributes.
- Middle—Extended task attributes. These are displayed only when the task has extended attributes.
- Bottom—Custom task attributes. These attributes can be filtered by configuring the `attributeFilterInclude` and `attributeFilterExclude` properties of the Interaction Server Connector service.

User-friendly on-screen labels for custom attributes can also be configured.

You can view the offset from the current time for attributes that display a timestamp, such as Task Due D/T, by moving the mouse cursor on top of the attribute. The offset is displayed in a hint.

You can also hover your mouse over an task attribute and view the whole value of the task attribute as a tooltip.

-| Task History=

Task History

Task History can be viewed by clicking the History tab in the Task Details view. It displays all of the task attributes' values and the task history events.

Attribute/Action	Event	Description	
Date/Time		The date/time when the event occurred.	
Actor		Shows who triggered the event. This is empty for iWD system-triggered events.	
Event Code	NEW	Task has just been created.	
	CLASSIFY_START	Task classification has started.	
	CLASSIFY	Task classification has finished.	
	PRIORITIZE_START	Task initial prioritization has started.	
	PRIORITIZE	Task initial prioritization has finished.	
	HOLD	Task is held. This can be triggered by the task source system or by the user with the task Held operation (see Hold Tasks in the Task Operations tab).	
	RESUME	Task is resumed from the held state. This can be triggered by the task source system or by the user with the task Resume operation (see Resume Tasks in the Task Operations tab).	
	REJECT	Task was rejected. Either the department or the process to which the task was associated is expired or not yet active.	
	ERROR	A processing error has occurred, and the task was held for that reason.	
UPDATE	Task attributes are updated. This can be triggered by a task source system or based on updates to a task's attached data from a routing strategy or Genesys		

Attribute/Action	Event	Description	
		Interaction Server client such as an agent or knowledge worker's desktop application.	
	UPDATE_COMPLETE	Task attributes are updated after a task is completed.	
	ASSIGN	Task is assigned to an agent.	
	FINISH	Agent has finished working on the task.	
	FINISH_RETURN	Agent has returned the task to queue.	
	STOPPED	That task has stopped (removed from database).	
	COMPLETE	Task is completed	
	QUEUE	The task is queued.	
	DISTRIBUTE_QUEUE	The task is put into a queue.	
	DISTRIBUTE_WORKBIN	The task is put into a workbin.	
	REPRIORITIZE	Task reprioritization has finished.	
Event		A formatted description of the event.	

| - | Task Operation =

Task Operations

Task operations provide the ability to override manually the configured task-handling business logic. Task operations are performed on the selected task.

Hold Tasks

The Hold Tasks operation holds the selected task. When a task is held, it will not be reprioritized or distributed, but it can be canceled, updated, restarted or resumed.

Resume Tasks

The Resume Tasks operation resumes processing of a held task. Only held tasks can be resumed.

Cancel Tasks

The Cancel Tasks operation permanently cancels processing of the selected task. A task cannot be canceled if it has been completed, canceled, or rejected. A task can be canceled if it is already in an Assigned state.

Modify Tasks

The Modify Tasks operation allows an update of a number of task attributes and, optionally a restart of the task. Here's an example:

The screenshot displays the 'ACME Solution > Financial Department' interface. At the top, there is a filter set to 'All' and an 'Advanced' search option. Below this is a table of tasks with columns for ID, Status, Media Type, Channel, Process, Created D/T, Business Value, Priority, and Task Due D/T. The task with ID '0230PQ2CDMDEG004' is selected and highlighted in yellow. Below the table is a toolbar with buttons for Refresh, Hold, Resume, Cancel, Modify, Export to XML, and Configuration.

The 'Modify 1 Task(s)' dialog box is open, showing two sections: 'Core Attributes' and 'Extended Attributes'. Each section contains a list of attributes with checkboxes and input fields for their values.

Core Attributes	
Business Value	<input type="checkbox"/> 80
Priority	<input type="checkbox"/> 130
Activation D/T	<input type="checkbox"/>
Due D/T	<input type="checkbox"/> 2010.19.8 16:09
Reprioritization D/T	<input type="checkbox"/> 2010.19.8 16:08
Expiration D/T	<input type="checkbox"/> 2010.19.9 15:59
Category	<input type="checkbox"/>
Channel	<input type="checkbox"/> MQ

Extended Attributes	
Customer Segment	<input type="checkbox"/> Gold
Customer ID	<input type="checkbox"/> Signa , Inc
Product	<input type="checkbox"/> Widget1
Subproduct	<input type="checkbox"/> Cables
TOS Tenant	<input type="checkbox"/> ACME
TOS Process	<input type="checkbox"/> Account_Deaktivierung
TOS Subprocess	<input type="checkbox"/> Delivery
TOS Created D/T	<input type="checkbox"/> 2010.19.8 18:00
TOS Due D/T	<input type="checkbox"/> 2010.19.8 18:00

At the bottom of the dialog box are buttons for Save, Save & Restart, and Cancel.

An attribute will be updated only if the check box that is next to it is checked; it will be checked automatically if a value of the corresponding field has changed. If the task is also restarted, its status is set to New, and it is classified and prioritized again in the same way as a new task.

The setUpdateTrigger Function in URS

The URS setUpdateTrigger function can be used in the Distribution routing strategy prior to the task (interaction) going to the Target block. Then, while the task (interaction) is in the Target block waiting to be routed to an agent, if the Priority attribute is modified through the Global Task List, the internal queue in URS will take this new priority into account. Refer to the [Universal Routing 8.1 Reference Manual](#) for more information about this function.

Important

The setUpdateTrigger function was introduced in URS 8.0.1.

Example-Save and Restart

Consider the following use case:

A task is assigned to a Process, but that Process has a start date that is in the future. In this scenario, the task is placed into the iWD_Rejected queue. How can this task be re-initiated once the start date of the Process has been reached? In order to re-initiate processing of this task, you must perform a Save & Restart in the Global Task List. Processing of the task will not re-initiate automatically.

1. Select one or more tasks in the Global Task List and click on the Modify button.
2. At the bottom of the screen, click Save & Restart. You do not have to modify any attributes. The result is that the interaction (task) will be placed back into the iWD_New queue in the iWD business process.

This Save & Restart action might be taken if the task is in the Rejected status, or potentially for other business reasons where the task should be treated as if it has just been captured.

Export Tasks to XML

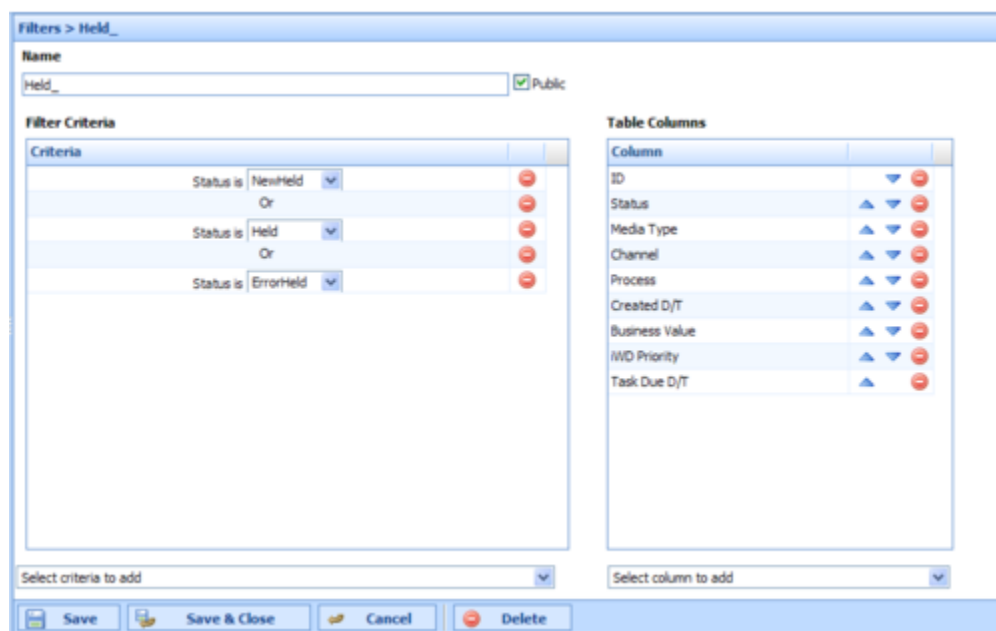
The Export Tasks to XML operation exports all selected tasks from the Global Task List to an XML file. The XML file will contain all of the available attributes for each task in the standard iWD format.

Once it has been exported, a task from an XML file can be imported into a third-party application (such as Microsoft Office Excel) for further analysis and processing.

| Filters=

Filters

Filters allow you to refine the list of tasks that are displayed in the Global Task List. Each filter is defined by a set of filter criteria (optional) and table columns that will be displayed in the Global Task List. Here is an example.



The table below lists the attributes and actions that are available in Filters view.

Filter Attributes

Attribute/Action	Description
Name	The name of the filter.
Public	Whether the filter will be available to all users (checked) or only the current user (unchecked).
Filter Criteria	Tasks that do not match the defined criteria will be excluded from the Global Task List when the filter is selected. New criteria conditions can be added by selecting them from the Select criteria to add drop-down list. Some criteria conditions are parameterized; for such conditions, parameters can be configured directly in a criteria table (such as, status for Status is ... criteria). Custom attributes can be used in many of the filter criteria, with proper configuration. See Configuring Custom Attributes.

Attribute/Action	Description
Table Columns	The Global Task List will display these columns when the filter is selected. Columns can be added, removed, and reordered. A user can select from a list that includes all iWD core and extended attributes, by default. With proper configuration, custom attributes can be also be selected.
Save, Save & Close, Cancel, Delete	Standard iWD Manager functions as described in Task Operations.