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iWD GAX Plugin Help

Business Structure

Business Structure

[+] DESCRIPTION

The Business Structure is a hierarchy of business units. Each Tenant can contain one or more Solutions as the first level of the hierarchy. Below Solutions are Departments. Below Departments are Processes. For example:

- East London Office—Solution (note that this meaning means the top node of a business structure, rather than the meaning of Solution in Genesys Configuration environment.)
 - Finance Department—Department
 - Accounts Payable—Process
 - Order Processing—Process

Warning

All node names have to be unique within the parent node. For example, moving Department D1 to another solution which already has a Department named D1 generates an error.

Warning

Only one business structure per Tenant is possible.

Levels of a Business Structure for a Tenant:

• [+] SOLUTIONS

Solutions are used for partitioning logical and physical resources for purposes of user access control and load partitioning (performance). Normally there will be one Solution per Tenant, though you can configure multiple solution instances per tenant, if necessary (for example, "Production" and "Test").

A Solution in iWD represents a runtime environment, which is composed of the following:

- Runtime nodes—iWD runtime application instances that are within the Java application server in which services are being run
- Services—Services that enable iWD functionality, such as Data Mart, Statistics Adapter, and logging.
- Business logic—Primarily the configuration of iWD departments and processes.

The Solution level in a Business Structure corresponds to the Global level in Genesys Rules System for the processing logic of business rules.

• [+] DEPARTMENTS

A Department represents an administrative unit within a Solution. A Solution can contain many Departments. The Department level of a Business Structure corresponds to the Department level in Genesys Rules System for the processing logic of business

rules.

- **[+] PROCESSES**

A Process represents an administrative unit within a Department. A Department can contain many Processes. The Process level of a Business Structure corresponds to the Process level in Genesys Rules System for the processing logic of business rules.

Display Options

Filters and Constraints

Configuration Server respects tenancy permission settings. You can access only those objects that you have been granted permissions and privileges to access.

You can filter the contents of this list in two ways:

1. Type the name or partial name of an object in the **Quick Filter** field.
2. Click the cube icon to open the **Tenant Directory** filter panel. In this panel, click the Tenant that you want to select. Use the **Quick Filter** field in this panel to filter the Tenant list.

You can sort the items in the list by clicking the **Name** column. Clicking a second time reverses the sort order. You can add or remove columns by clicking **Select Columns**.

To select or de-select multiple objects at once, click **Select**.

Data Fields

Each entry is shown with the following data fields:

- **Name**—The element's name.
- **Type**—Solution, Department or Process
- **ID**—The runtime ID of this element.
- **Contact Name**—Contact name for queries about this element.
- **Description**—Free-format text description of the element.

Solutions

To create a new Solution

To create a new Solution, do one of the following:

- If one or more Solution is already present, select one Solution and click **More**, then click **Clone**, then edit the Solution data fields.
- If one or more Solution is already present, Display the details of an existing Solution and click **Clone**, then edit the new Solution data fields.
- If no Solution is present, click the the **New** button (+), choose Solution, then edit the Solution data fields.

Other Actions

From this context you can **Delete** this Solution.

Warning

1. Deleting a Solution can have huge implications for the operation of a contact center. Do not undertake these without serious consideration.
2. If you delete a Solution, all related rules packages in GRS will be lost, and you will not be able to recreate new rules packages with the same name.

Solution Details

- **Solution Name**—The Solution name. Mandatory when you add a new Solution.
- **ID**—The ID of the Solution. Mandatory when you add a new Solution. The system will propose a default new Runtime ID.
- **Timezone**—Solution timezone. Use the drop-down list to change this.
- **First Day of Week**—The first day of the working week for this Solution. Use the drop-down list to change this.
- **Description**—Free-format text description of the Solution.

The following options allow customization of interaction queues used by iWD in the current Solution. Non-standard queue names must be defined when there are multiple iWD business processes configured in the same Tenant. Queue names can be selected from drop-down lists. If a value is missing, a default name is displayed for this queue.

- **Queue for new tasks**—Interaction queue recognized by iWD as an entry to the business process in this solution. Default values:
 - IRD—iWD_New

- `Composer—iwd_bp_comp.Main.iWD_New`
- **Queue for captured tasks**—Interaction queue for tasks successfully processed by the Classification strategy. Default values:
 - `IRD—iWD_Captured.`
 - `Composer—iwd_bp_comp.Main.iWD_Captured`
- **Queue for queued tasks**—Interaction queue for tasks successfully processed by the Prioritization strategy. Default vlaues:
 - `IRD—iWD_Queued`
 - `Composer—iwd_bp_comp.Main.iWD_Queued`
- **Queue for completed tasks**—Interaction queue for tasks marked as completed by agents. Default values:
 - `IRD—iWD_Completed`
 - `Composer—iwd_bp_comp.Main.iWD_Completed`
- **Queue for rejected tasks**—Interaction queue for tasks rejected by the Classification strategy. Default values:
 - `IRD—iWD_Rejected`
 - `Composer—iwd_bp_comp.Main.iWD_Rejected`
- **Queue for canceled tasks**—Interaction queue for tasks canceled by a Global Task List user or by a capture point. Default values:
 - `IRD—iWD_Canceled`
 - `Composer—iwd_bp_comp.Main.iWD_Canceled`
- **Queue for error-held tasks**—Interaction queue for tasks that failed to be processed by the Classification or Prioritization strategies. Default values:
 - `IRD—iWD_ErrorHeld`
 - `Composer—iwd_bp_comp.Main.iWD_ErrorHeld`

Interaction Server Settings

- **Interaction Server**—The Interaction Server for this Solution. Use the drop-down list to change this. This drop-down list contains those Interaction Servers which contain the Solution's parent Tenant on their Tenants list.
- **Port**—The connection port of the Interaction Server. Use the drop-down list to change this. This drop-down list contains the Interaction Server chosen above ports from the ports list.

Important

If two Solutions are configured to use the same Interaction Server, be aware that the

Port settings (that is, secure or non-secure) of the Solution that is configured *second* are the ones that the Interaction Server will use. It is preferable to ensure that both Solutions' Port settings are of the same type—either both secure, or both non-secure. Every configuration object or parameter that references the Port ID (and therefore can be either secure or non-secure) will work in the same way—the setting of the one configured second (where two Solutions are configured) is the one that the Interaction Server will use. This affects connection protocol, local timeout, remote timeout, trace mode and transport protocol parameters.

- **Connection Protocol**—The connection protocol of the Interaction Server. Use the drop-down list to change this. This parameter is set as the connection attribute of the Interaction Server connection in the iWD Manager application.
- **Protocol Timeout**—The timeout configured for the connection protocol.
- **Local Timeout**—The timeout configured on the local server. This parameter is set as the connection attribute of the Interaction Server connection in the iWD Manager application.
- **Event Buffer Size**—The maximum size in bytes of the event buffer.
- **Remote Timeout**—The timeout configured on the remote server. This parameter is set as the connection attribute of the Interaction Server connection in the iWD Manager application.
- **Threads**—The number of threads available.
- **EventLog JDBC URL**—The URL of the JDBC event log. Mandatory for all database engines set in the Eventlog DAP (connected to Interaction Server set above), apart from MSSQL.
- **Attribute Filter Include**—Attributes included here will appear in the Custom Attributes displayed in the Global Task List in iWD Manager.
- **Attribute Filter Exclude**—Attributes excluded here will not appear in the Custom Attributes displayed in the Global Task List in iWD Manager.

Permissions Settings (new in 8.5.105)

Business Structure details include a **Permissions** tab on which users with the relevant permissions can view and edit permissions settings for all users of the selected node.

Permissions Table

Permission	Description
Read	Permission to read information and receive updates about the object.
Create	Permission to create objects in this folder.
Change	Permission to change the properties of the object. The Change permission is the same as allowing "Write" access.

Permission	Description
Execute	Permission to perform a predefined action or set of actions with respect to the object.
Delete	Permission to delete the object.
Read Permissions	Permission to read the access control settings for the object.
Change Permissions	Permission to change the access control settings for the object.
Execute	Permission to perform a predefined action or set of actions with respect to this object.
Propagate	For container objects (such as Tenants). The Propagate check box controls whether to propagate this set of elementary permissions to the child objects. By default, the check box is selected).

Actions

- **Add Access Group**—Displays the **Select Access Group** panel from which you can select one of the available Access Groups to add to this node and for whom you can then configure permissions.
- **Add Person**—Displays the **Select Person** panel from which you can select one of the available Persons to add to this node and for whom you can then configure permissions.
- **Replace Recursively**—Enables you, upon confirmation, to remove permissions for all child objects of this container and replace them with the permissions defined in this container.

Departments

To create a new Department

To create a new Department, first choose the Solution to work with, then do do one of the following:

- If one or more Department is already present, select one Department and click **More**, then click **Clone**, then edit the Department data fields.
- If one or more Department is already present, display the details of an existing Department and click **Clone**, then edit the new Department data fields.
- If no Department is present, click the the **New** button (+), choose Department, then edit the Department data fields.

Other Actions

From here you can **Clone**, **Delete** or **Move** this Department. You can move the Department only to a Solution. Any Processes configured under it will also be moved. Runtime IDs are not moved in the Move function—you must create a new one for the Department and all its child Processes in its new Solution.

Warning

1. Deleting or Moving a department can have huge implications for the operation of a contact center. Do not undertake these without serious consideration.
2. If you delete a Department or Process, any rules assigned to those objects will be inactivated and moved to the Solution level. This happens if you delete and re-create a Solution/Department/Process with the same name.

Department Details

- **Department Name**—The department name. Mandatory when you add a new Department.
- **ID**—The department's Runtime ID. Mandatory when you add a new Department. The system will propose a default new Runtime ID.
- **Contact Name**—The contact name for the department, for informational purposes.
- **Contact Email**—The contact email for the department, for informational purposes.
- **Contact Phone**—The contact phone number for the department, for informational purposes.
- **Start Date**—The date on which the department becomes active. If left empty, the period start date is unconstrained.
- **End Date**—The last day that the department is active. If left empty, the period end date is unconstrained (that is, the department will be active infinitely).
- **Description**—Free-format text description of the Department.

Department Attributes

Click **Add** to create new attributes.

- **Name**—The attribute name
- **Type**—Select from the drop-down list. Valid values are:
 - Text
 - Percentage
 - Number

- Date
- Lookup Table
- **Value**—The attribute value. If the type is a lookup table, then the value is set from the drop-down list.
- **Description**—Free-format text description of the attribute.

Department Metrics

Click **Add** to create a set of user-defined metrics, for reporting purposes.

[+] MORE

A key component of dashboards and reports is the comparison of actual metrics against target goals. Understanding the effectiveness or efficiency of organizations requires measuring performance against important goals that have been set by the organization. Targets can be associated with a number of objects, such as processes, departments, or tenants. For example, a work-time goal for a task will differ, based on its process; for example, orders will take longer than address changes. You can use metrics to measure this. Example:

When a metrics value is set, it will be stored as a named attribute in Data Mart. If the value is changed, the updates are pushed through to Data Mart with a `valid_from` and `valid_to` date/time stamp. This is important for historical reporting. For example, if you update the target on November 1 from 2.5 to 3.5, all tasks up to November 1 will use 2.5, and all new tasks will use 3.5. If the value is set at a department level, it applies to all processes, unless there is a specific value for that process. For example, Department 1 has four processes: A, B, C, and D. Cost/Task @ Department 1 = 2.50, which applies to Processes B, C, and D. Cost/Task @ Process A = 1.50, which applies only to Process A.

- **Name**—The metric name
- **Type**—Select from the drop-down list. Valid values are:
 - Text
 - Percentage
 - Number
 - Date
 - Lookup Table
- **Value**—The attribute value. If the type is a lookup table, then the value is set from the drop-down list.
- **Description**—Free-format text description of the attribute.

Permissions Settings (new in 8.5.105)

Business Structure details include a **Permissions** tab on which users with the relevant permissions can view and edit permissions settings for all users of the selected node.

Permissions Table

Permission	Description
Read	Permission to read information and receive updates about the object.
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Change	Permission to change the properties of the object. The Change permission is the same as allowing "Write" access.
Execute	Permission to perform a predefined action or set of actions with respect to the object.
Delete	Permission to delete the object.
Read Permissions	Permission to read the access control settings for the object.
Change Permissions	Permission to change the access control settings for the object.
Execute	Permission to perform a predefined action or set of actions with respect to this object.
Propagate	For container objects (such as Tenants). The Propagate check box controls whether to propagate this set of elementary permissions to the child objects. By default, the check box is selected).

Actions

- **Add Access Group**—Displays the **Select Access Group** panel from which you can select one of the available Access Groups to add to this node and for whom you can then configure permissions.
- **Add Person**—Displays the **Select Person** panel from which you can select one of the available Persons to add to this node and for whom you can then configure permissions.
- **Replace Recursively**—Enables you, upon confirmation, to remove permissions for all child objects of this container and replace them with the permissions defined in this container.

Processes

To create a new Process

To create a new Process, first choose the Solution and Department to work with, then do one of the following:

- If one or more Process is already present, select one Process and click **More**, then click **Clone**, then edit the Process data fields.
- If one or more Process is already present, display the details of an existing Process and click **Clone**, then edit the new Process data fields.
- If no Process is present, click the the **New** button (+), choose Process, then edit the Process data fields.

Other Actions

From here you can **Clone**, **Delete** or **Move** this Process. You can move the Process only to a Department. Runtime IDs are not moved in the Move function—you must create a new one for the Process in its new Department.

Warning

1. Deleting or Moving a Process can have huge implications for the operation of a contact center. Do not undertake these without serious consideration.
2. If you delete a Department or Process, any rules assigned to those objects will be inactivated and moved to the Solution level. This happens if you delete and re-create a Solution/Department/Process with the same name.

Process Details

- **Process Name**—The Process name. Mandatory when you add a new Process.
- **ID**—The Runtime ID of the Process. Mandatory when you add a new Process. The system will propose a default new Runtime ID.
- **Contact Name**—The contact name for the process, for informational purposes.
- **Contact Email**—The contact email for the process, for informational purposes.
- **Contact Phone**—The contact phone number for the process, for informational purposes.
- **Start Date**—The date the process becomes active. The start date of the process cannot be earlier than the start date of the parent department.
- **End Date**—The last day that the process is active. If left empty, the period end date inherits the end date value of the parent department.
- **Description**—Free-format text description of the Process.

Process Attributes

Click **Add** to create new attributes.

- **Name**—The attribute name
- **Type**—Select from the drop-down list. Valid values are:
 - Text
 - Percentage
 - Number
 - Date
 - Lookup Table
- **Value**—The attribute value. If the type is a lookup table, then the value is set from the drop-down list.
- **Description**—Free-format text description of the attribute.

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- **Name**—The attribute name
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Related Links

- **Data Mart**

- **Data Mart Dashboard**
 - **Lookup Tables**
-