

# **GENESYS**<sup>®</sup>

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## Working with the iWD Business Process in IRD

intelligent Workload Distribution 8.5.1

1/25/2022

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# Working with the iWD Business Process in Interaction Routing Designer (IRD)

## This Document

These topics describe how to:

- Work with and adapt the Interaction Routing Designer (IRD) iWD Business Process (IWDBP) that is supplied out-of-box with intelligent Workload Distribution.
- Clone the IWDBP to create new business processes under a single Tenant

#### Working with and Adapting the iWDBP

The iWD Business Process is made up of a set of Interaction Queues that map to the iWD state model. **[+] SHOW THE SET** 

- NEW
- ERRORHELD
- CAPTURED
- COMPLETED
- CANCELED
- REJECTED
- QUEUED

Within this Business Process, from within a routing strategy, External Service Protocol (ESP) blocks are used to invoke Genesys Rules Engine (GRE) functions. This approach is used to apply classification and prioritization rules to the interaction. When a user goes to the Global Task List (GTL) view in iWD Manager, to monitor the interactions that are in various states, this component communicates with Interaction Server to retrieve the list of interactions and their attributes.

This out-of-the-box Genesys iWD Business Process maps to the iWD state model, allowing you to use iWD-based reporting for other interaction types (for example, you might want to track Genesys e-mails along with other task types, under the same Department or Process).

This Genesys iWD Business Process is completely optional for iWD customers who are using Genesys E-mail, Genesys Chat, Genesys SMS, or even third-party e-mail, SMS, or chat. If the Genesys iWD Business Process is not used, iWD Runtime Node/Data Mart and iWD Global Task List functionality may be limited.

For Genesys eServices customers, the Genesys iWD Business Process can be left unchanged if you want to use business rules only. In this scenario, what would change would be the routing strategies.

The strategies would use ESP blocks to invoke the Genesys Rules Engine. This means that existing Genesys E-mail, Chat or SMS/MMS customers can use the business rules within iWD without having to change their Genesys Business Processes; or, to access some additional functionality, changes can be made to the Business Processes.

#### Cloning the iWDBP to Create New Business Processes

Before 8.5.1 the out-of-box iWDBP required you to use just one business process and one set of queues to handle every work item that you are processing. In the event of your organisation's business structures and processes becoming very large and complex, this flexibility can at some point become a hindrance because every work item must be handled by the same set of queues.

From release 8.5.1 you can create new business processes (under the same Tenant) that can support clear logical distinctions between processes and departments For example, interactions from different media types (e-mail, chat, SMS and so on) can be handled by separate business processes with their own customized queue names, and this in turn can provide clear logical distinctions in reporting, because the queue name is the basis for handling reporting requirements.

This is achieved by by cloning and editing the iWDBP, and making the interaction queues (supplied out-of-box with iWD) configurable for your needs, together with some additional configuration changes.

If you configure more than one business process, customized queues must be configured for each Solution in the iWD GAX Plug-in. Only the existing queues may be used. The custom queue *names* will then be used by both iWD Manager and iWD Data Mart instead of the default ones.

See the **Deployment Guide** for more information.

# New Features by Release

## 8.5.105

#### Segmentation Support

Segmentation settings have been added to the **ToDistribute** View in the Distribution routing strategy in the iWD Business Processes for both IRD and Composer/ORS. Segmenting interactions ensures that all agents are kept busy by distributing tasks in each segment separately. As a result, even in a Distribution strategy that is populated by high-priority tasks assigned to small groups of agents, the strategy will not become so saturated that distribution of tasks to other agents is blocked.

The Distribution strategy can now make a call to the configured segments and add an **IWD\_Segment** attribute to the interaction data. More information:

- IWD Business Process diagram
- Changes to IWD BP Strategies and Subroutines in 8.5.105

#### New FindListObjectName Subroutine

The DetermineESPServerName and DetermineRulePackageName subroutines are amalgamated into and replaced by the new FindListObjectName subroutine.

#### Code Refactoring

In several other strategies (in addition to Distribution), code has been refactored in order to simplify them. More information:

• Changes to IWD BP Strategies and Subroutines in 8.5.105

#### 8.5.104

#### New Strategies & Subroutines

The following new strategies and subroutines modularize existing functionality that was previously included and/or repeated in the detail level of the other five strategies in the IWDBP. Consequently, those existing five strategies that invoked UCS and GRE, or repeated the flow that checked for business value and priority, can now call these new blocks directly, and as a result have been substantially simplified.

#### InvokeUCS Strategy

- InvokeGRE Strategy
- CheckBusinessValueAndPriority Subroutine

Click **here** for a diagram.

#### **Documentation Changes**

The following topics have been removed from this 8.5.1 updated document:

- Adapting the IWD Business Process for the Genesys E-mail Channel
- iWD Rules and Existing Business Processes

Please refer to their 8.5.0 equivalents if required

- Adapting the IWD Business Process for the Genesys E-mail Channel
- iWD Rules and Existing Business Processes

# Prerequisites

## Software Requirements

#### The 8.5.1 IWD Business Process requires:

- Interaction Server 8.5.1 or higher
- Universal Routing 8.1 or higher
- iWD 8.5.1 or higher
- GRS 8.5 or higher
- Application Server to deploy iwd\_bp.war

#### plus:

• Interaction Routing Designer 8.1.2 or higher.

## Other Information Resources

- The **Universal Routing 8.1 Deployment Guide** describes how to have the Interaction Design shortcut bar appear in IRD, if it has not appeared automatically.
- The Universal Routing 8.1 Business Process User's Guide provides an in-depth discussion of business processes.
- The Universal Routing 8.1 Interaction Routing Designer Help Zip describes how to create, save, import and export a business process, and how to load the strategies that comprise the business process.

#### Important

The IRD Main Window contains a Business Processes list pane that is disabled by default, but can be enabled

# iWD Business Process - Contents

The iWD business process (IWDBP) contains the following strategies:

- Classification
- Prioritization
- Distribution
- MarkInteractionAsDone
- Removal
- InvokeUCS—New in 8.5.104. This strategy block modularizes calls to UCS that prior to 8.5.104 were repeatedly invoked within other strategies.
- InvokeGRE—New in 8.5.104. This strategy block modularizes calls to GRE that prior to 8.5.104 were repeatedly invoked within other strategies.

The iWD business process contains the following subroutines:

- DetermineESPServerName—Deprecated in 8.5.105
- DetermineRulePackageName—Deprecated in 8.5.105
- FindObjectListName—New in 8.5.105

#### Important

In release 8.5.105, the DetermineESPServerName and DetermineRulePackageName subroutines are amalgamated into and replaced by FindObjectListName

• CheckBusinessValueAndPriority—New in 8.5.104. This subroutine modularizes checks for business value and priority that prior to 8.5.104 were repeatedly invoked within other strategies.

The iWD business process contains the following queues:

- iWD\_New
- iWD\_Captured
- iWD\_Queued
- iWD\_Canceled
- iWD\_Rejected
- iWD\_Completed
- iWD\_ErrorHeld

The Interaction Queues that are included in the out of the box IWDBP business process must be

present. The names can be changed, but it is necessary to appropriately configure iWD with new names. The Global Task List looks for the defined Interaction Queue names. If you modify the business process to add additional queues or rename existing queues, and the change is not reflected in the configuration of iWD, the *interactions* display in the Global Task List with the status Queued. In this document it is assumed that original queue names are used.

# IWDBP Strategies & Subroutines in 8.5.104

## Classification Strategy

## Classification Strategy

The purpose of this strategy is to invoke corresponding classification rules, analyze the result of the rules application and place the interaction into the appropriate queue, depending on the result.

This strategy processes interactions from the following queues:

- iWD\_New—Interactions have to satisfy the following conditions:
  - There are no conditions here.
  - Interactions are taken in order they were submitted.

The 'Al	' Interact	ion Queu	e View Prope	rties	×
Gener	ral Conditio	on Order	Scheduling	Parameterized Conditions	Dat. 4 >
					A

Flow Summary

Click to enlarge.



## Flow Detail

- 1. Entry to the Classification strategy.
- 2. A variable is initialized: \_delay\_ms specifies the delay (in milliseconds) between attempts to invoke rules.
- 3. A command is sent to URS to use interaction age while sorting interactions in internal queues.
- 4. The InvokeUCS subroutine is invoked to create new interaction in the UCS database.
- 5. The InvokeGRE subroutine is invoked.
- 6. Check if InvokeGRE subroutine finished without errors.
- 7. Verification is done to check if a business process was assigned by a classification rule.
- 8. If a business process was assigned, then the interaction is placed in the iWD\_Captured queue.
- 9. If no business process was assigned, the interaction is placed into the iWD\_ErrorHeld queue.
- 10. The last error is attached to user data as a key-value pair with the key IWD\_GRE\_Error.
- 11. A check is done to see if the error code is related to the iWD Department or Process not being available (for example, if the current date is outside of the Start and End Dates of the Department or Process).
- 12. If the Department or Process is not active yet, the interaction is placed in the iWD\_Rejected queue.
- 13. Set \_last\_error\_key\_ to IWD\_GRE\_Error.
- 14. The last error is attached to user data as a key-value pair with the key \_last\_error\_key\_.
- 15. The interaction is placed into the iWD\_ErrorHeld queue.

- 16. Set \_last\_error\_key\_ to IWD\_UCS\_Error.
- 17. Exit Classification strategy.

Prioritization Strategy

## Prioritization Strategy

The purpose of this strategy is to invoke the corresponding prioritization rules, analyze the result of the rules application and place the interaction into the appropriate queue, depending on the result.

This strategy processes interactions from the following queues:

- iWD\_Captured—Interactions have to satisfy the following conditions:
  - Active interactions only (interactions which do not have the property IWD\_activationDateTime set, or this property has a time stamp which is in the past.
  - Interactions are taken in the order they were submitted.

ieneral	Condition Order	Scheduling	Parameterized Conditions	Data 1
IWD_	activationDateTime	is null		<u> </u>
OR	ant time() >= Nu/D	ate Decision	Fimel	

#### Active Interactions only

- iWD\_Queued—Interactions have to satisfy the following conditions:
  - Interactions that are subject for immediate reprioritization (interactions that have the property IWD\_reprioritizeDateTime set to a time stamp which is in the past)
  - Interactions are taken in order of IWD\_reprioritizationDateTime (oldest first).

General	Condition	Order Scheduling Parameterized	Conditions   Data

#### For reprioritization

## Flow Summary

😰 Routing Design - Prioritization	
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▋█ Q ♦ ◎ ∄ ⊠ ⊷ ⊷ 凿	
Attach error message Region (1) 2 10 10 10 10 10 10 10 10 10 10	5 Place into iWD_ErrorHeld Place into iWD_Queued Place into iWD_ErrorHeld
For Help, press F1	CS: ansi C: ansi(1 //

#### Flow Detail

- 1. Entry to the Prioritization strategy.
- 2. Variables are initialized:
  - \_source\_queue is the queue from which the interactions came. It will be used to determine if the prioritization service is being requested for initial prioritization or reprioritization.
  - \_error\_timeout\_ms specifies the delay (in milliseconds) between attempts to invoke rules.

- \_default\_priority specifies the priority which will be assigned if a priority is not specified by the customer (as part of the task capture) or by rules.
- 3. The InvokeGRE subroutine is invoked.
- 4. A check is made to see if this is the first time that prioritization rules are being evaluated for the interaction, and the priority was not set up by any rules. If this check is false, flow goes to 7.
- 5. The error message Priority is not set up by rules is attached to Interaction Server data as a keyvalue pair with the key IWD\_Prioritization\_Error.
- 6. The interaction is placed in the iWD\_ErrorHeld queue.
- 7. The interaction is placed in the iWD\_Queued queue.
- 8. Set \_last\_error\_key\_ to IWD\_GRE\_Error.
- 9. The last error is attached to user data as a key-value pair with the key \_last\_error\_key\_.
- 10. The interaction is placed in the iWD\_ErrorHeld queue.
- 11. Exit Prioritization strategy.

## Distribution Strategy

## Distribution Strategy

This strategy routes interactions to a requested Agent, requested Agent Group, requested Skill, or to the default iWD Agent Group. This strategy processes interactions from the following queues:

- iWD\_Queued—Interactions have to satisfy the following conditions:
  - Interactions that are not subject for immediate reprioritization (interactions that do not have the property IWD\_reprioritizeDateTime set, or that have this property set to a time stamp that is in the future).
  - Interactions are taken in order of priority (highest priority first)

## Flow Summary



## Flow Detail

- 1. Entry to the Distribution strategy.
- 2. Extract information about requested agent, agent group, or skill and initialize internal variables.

ulti	Assign properties		
neral	4		
Assi	gn		
ž	×		Edit Variables
	Name	Expression	
1	_requested_agent_grou	UData[TWD_ext_requestedAgentGroup']	
2	_ion_priority	UDataINT['Priority']	
3	_requested_agent	UData['TWD_ext_requestedAgent']	
4	_requested_skill	UData[TWD_ext_requestedSkill]	
5	_currentDT_int	GetUTC[]	
6	_reprioritizeDT_str	UData['TWD_reprioritizeDateTime']	
7	_reprioritizeDT_int	UTCFromString[_reprioritizeDT_str]	
8	default target timegat	3600	

Multi-Assign - Requested Agent and Skill

- 3. A calculation is done to determine the timeout—how long the interaction should wait for a target to become available.
- 4. If the reprioritize time was set up and the calculated timeout is less than or equal to the default timeout (1 hour, see Step 1), then the timeout remains as it is.
- 5. If the reprioritize time was not set, or the calculated timeout is greater than the default timeout, then the waiting timeout is set to the default (1 hour).
- 6. Analysis is done to determine whether an agent was requested.
- 7. If an agent was requested, the URS variable is prepared (.a is added).
- 8. Try to route the interaction to the requested agent without waiting.

Iteraction Queue Targ	get Selection	
Statistics CMin Name CMax Targets		▼ Ser
🚁 🗙 🔽 Clear	Target Timeout 0	000
Z <sup>*</sup> × ✓ Clear Type	Target Timeout 0	StatServer

#### Route to agent

9. Try to route the interaction to an agent with the requested skill without waiting.

nteraction	Queue Tar	get Selection	
Statistic	\$		
⊙ Min	Name	StatAgentLoading	<u> </u>
Targets			
2)	<li>Clear</li>	Target Timeout 0	✓ Sec
	Туре	Name	StatServer
1 Skill		requested skill >	3

#### Route to Skill

- 10. Analysis is done to determine whether an Agent Group was requested.
- 11. If an Agent Group was requested, the URS variable is prepared (.ga is added).
- 12. Try to route the interaction to the requested Agent Group without waiting.

ntera	action Queue	Target Selection	
St	atistics		
0	Mjn Nar M <u>a</u> x	ne StatAgentLoading	
Ta	argets	Char Tarach Timeout 0	
2	<u>s × –</u>	cjear rarget milleout ju	<u> </u>
	Туре	Name	StatServer
1.4	Variable	requested agent group	

#### **Route to Requested Agent Group**

13. Try to route the interaction to the iWD agent group with a wait time of 60 seconds.

teraction Queue Ta	rget Selection	
Statistics		
	StatAgentLoading	1
Targets		
🚁 🗙 🔽 Clea	r Target Timeout 🔤	vaitTargetTim 💌 Sec
Туре	Name	StatServer
1 1 1 1 1 1	TWD	

Route to Agent Group

- 14. Get the last error.
- 15. Verification is done as to why the target was not found.
- 16. An error code is attached in case of any error other than a timeout. If more than one target is available, URS uses the StatAgentsLoading statistic to select the Agent who has the minimum load (this applies to routing to Skills and routing to Groups only; routing to a requested Agent does not use statistics). For more information about this statistic, see the Universal Routing 8.1 Reference Manual. The Route Interaction object also has an Interaction Queue tab. (This applies to all three Route Interaction

	a Route Interaction properties		×
	Interaction Queue Target Selection		
	Queues	Description	
	↓ Queue for New Interaction 2 X Queues	Description	
objects in this strategy.)			

#### **Route Interaction Properties—Interaction Queue**

The optional Interaction Queue tab enables you to specify two types of queues:

- Queues for existing interactions (the queue in which the interaction should be placed after the agent is done working with it).
- Queues for new interactions (the queue in which new interactions created by the agent should be

placed).

A Description (optional) appears as a hint on the agent desktop as to where to place the interaction.

17. Exit from the Distribution strategy.

#### MarkInteractionAsDone Strategy

#### MarkInteractionAsDone Strategy

The purpose of this strategy is to update the Universal Contact Server (UCS) database to mark the interaction as done. This equates to setting the value in the Status column of the Interactions table to 3. UCS clients, such as Interaction Workspace, will then display the status of this interaction as done when the user looks at interactions they have previously processed.

Interactions have to satisfy the following conditions:

- The value of the attached data key IWD\_isContactServer is 1
- The value of the attached data key IWD\_isDone is either null or 0 (zero)

e man General	Condition Order Scheduling Parameter	erized Conditions   Data
IWD_ AND (IWD_	isContactServer = 1 _isDone is null OR (WD_isDone = 0)	*

#### MarkInteractionAsDone View

This strategy processes interactions from the following queues:

- iWD\_Completed
- iWD\_Canceled
- iWD\_Rejected

## Flow Summary



## Flow Detail

- 1. Entry to MarkInteractionAsDone strategy.
- 2. The InvokeUCS subroutine is invoked to complete interaction in the UCS database.
- 3. Reads \_last\_error\_str\_ from InvokeUCS.
- 4. The last error is attached to user data as a key-value pair with the key IWD\_UCS\_Error.
- 5. Exit MarkInteractionAsDone strategy.

## Removal Strategy

## Removal Strategy

The purpose of this strategy is to delete expired interactions from the Interaction Server database.

A key-value pair in user data with the key IWD\_expirationDateTime contains information about when an interaction has to be deleted.

This strategy processes interactions from the following queues:

- iWD\_Completed
- iWD\_Canceled
- iWD\_Rejected

Interactions have to satisfy the following conditions:

- Interactions must either have the property IWD\_expirationDateTime not set, or this property must have a time stamp which is in the past.
- Interactions are taken in the order they were submitted.

- 1
~

The 'Expired only' Interaction Queue View Properties

## Flow Summary



#### Flow Detail

- 1. Start.
- 2. When interactions enter the Removal strategy, the processing of the interaction is stopped. This means that the interaction is deleted from the Interaction Server database.

Invoke UCS Strategy

Invoke UCS Strategy

Flow Summary

#### Part 1

Click to enlarge.



#### Part 2



#### Flow Detail

- 1. Entry to InvokeUCS strategy.
- 2. Check if in\_method\_name = 'Create' | in\_method\_name = 'OMInteractions'.
- 3. Initialize variables:
  - \_tenant\_id—Read from task attribute TenantId.
  - \_interaction\_id—Read from task attribute InteractionId.
  - delay\_ms—Specifies the delay (in milliseconds) between attempts to invoke UCS.
- 4. Check if in\_method\_name = 'Create'.
- 5. The DetermineESPServerName subroutine is invoked to determine the correct ESP server name to use. The subroutine uses the List Object list called ContactServerList. This subroutine also sets up cases when there is reason to retry to invoke the ESP server.
- 6. If the subroutine was successful, a check is done to ensure the existence of the ESP Server name that was returned by the subroutine.
- 7. The value of the user data key IWD\_isContactServer is set to 1.
- 8. The value of the user data key IWD\_isContactServer is set to 0.
- 9. URS checks to see if the value of the user data key IWD\_isAddedToContactServer is equal to 1, indicating that the task is already written into the interaction history in the UCS database.
- 10. A new interaction is created in the UCS database for this iWD task. If that function is successful, flow goes to 11. The user data key IWD\_isAddedToContactServer is updated to 1 to indicate that the task was successfully added to the interaction history in UCS. The result returned from the ESP call to UCS is written to the variable IWD\_UCS\_Result.
- 11. The user data key IWD\_isAddedToContactServer is updated to 1 to indicate that the task was successfully added to the interaction history in UCS. The result returned from the ESP call to UCS (from See A new interaction is created in the UCS database, for this iWD task. If that function is successful is written to the variable IWD\_UCS\_Result.
- 12. If the subroutine fails an error is extracted.
- 13. If the creation of the interaction in UCS was unsuccessful, an error is extracted from user data.
- 14. A check is done to see if the error code is related to the ESP server communication.
- 15. This error is attached to user data as a key-value pair with the key IWD\_UCS\_Error.
- 16. The interaction is placed in the iWD\_ErrorHeld queue.
- 17. This error is attached to user data as a key-value pair with the key IWD\_UCS\_Error.
- 18. A delay is introduced, based on the value of the \_delay\_ms variable. The flow goes back to 5 to retry the connection to the ESP server.
- 19. Exit InvokeUCS strategy
- 20. The DetermineESPServerName subroutine is invoked to determine the correct ESP server name to use. The subroutine uses the List Object list called ContactServerList. This subroutine also sets up cases when there is reason to retry to invoke the ESP server.
- 21. If the subroutine was successful, a check is done to ensure the existence of the ESPserver name that was returned by the subroutine.

- 22. An error is extracted from user data.
- 23. An error is extracted from user data.
- 24. The value of the user data key IWD\_isDone is set to 0.
- 25. The strategy calls a method on the Universal Contact Server to set the status of the interaction to 3, indicating that the interaction is done.
- 26. The value of the user data key IWD\_isDone is set to 1.
- 27. The interaction is returned to its previous queue.
- 28. If the invocation of the method on the UCS fails, an error is extracted.
- 29. If it makes sense to retry updating the interaction record in UCS.
- 30. The last error code is attached to the interaction with the user data key IWD\_UCS\_Error.
- 31. A delay is introduced into the processing. Flow returns to step 20.
- 32. The last error is attached to user data as a key-value pair with the key IWD\_UCS\_Error when in\_method\_name is not set to 'Create' or in\_method\_name = 'OMInteractions'.
- 33. The last error code is attached to the interaction with the user data key IWD\_UCS\_Error.
- 34. The interaction is placed in the iWD\_ErrorHeld queue.
- 35. Exit InvokeUCS strategy.

## Invoke GRE Strategy

#### Invoke GRE Strategy

#### Flow Summary

#### Part 1

Click to enlarge.



#### Part 2

#### Click to enlarge. Routing Design - InvokeGRE Eile Edit View Tools Help 🖆 🖬 ð ð 🗴 🖻 🖻 🚳 🖊 이 📭 🌫 🗉 🚺 🐼 🚯 🖼 🗟 🖧 🕼 ٠ 🗟 🕼 🚸 🔕 🌐 🗠 🗈 🕁 击 🖻 🎽 🍳 3 8 5° X TALESS CORR 1445 1 A 8 Ϋ́ 19 18 Invoke GRE Check Check min/max values for IWD\_businessValue and Priority Delete IWD\_reprioritizeDateTime SetBusinessContext meth 20 in\_met G, F Attach IWD\_GRE\_Result Clear IWD\_GRE\_Result Invoke GRE Prioritize methy G líne 23 Attach last Ø, Get la hefore m f Attach last error Place to iWD\_ErrorHeld Attach last error 4 × CS: ansi EC: ansi(1250) LOG For Help, press F1 NUM

## Flow Detail

- 1. Entry to InvokeGRE strategy.
- 2. Check if in\_method\_name is set to SetBusinessContext or Prioritize.
- 3. A variable is initialized—\_delay\_ms specifies the delay (in milliseconds) between attempts to invoke rules.
- 4. The DetermineESPServerName subroutine is invoked to determine the name of the Genesys Rules Engine Application. The subroutine uses the List Object list GREServerList.
- 5. If the subroutine was successful, a check is done to ensure the existence of the ESP server name that was returned by the subroutine. If the ESP server name was found, the flow goes to 10. The DetermineRulePackageName subroutine is invoked to determine the name of the rule package that the Genesys Rules Engine will be invoking to evaluate the classification rules.
- 6. If the ESP server name was not found, this error is attached to user data as a key-value pair with the key IWD\_GRE\_Determination\_Error.
- 7. The interaction is placed in the iWD\_ErrorHeld queue.
- 8. If the subroutine fails an error is extracted.
- 9. This error is attached to user data as a key-value pair with the key IWD\_GRE\_Determination\_Error.
- Check if in\_custom\_package\_name was published to this subroutine. If it is set then in\_custom\_package\_name will be run. Otherwise package name needs to be found in Iwd\_Package\_List.
- 11. Assign in\_custom\_package\_name to \_gre\_package\_name and set \_return\_code to 0.

11a) The DetermineRulePackageName subroutine is invoked to determine the name of the rule

package that the Genesys Rules Engine will be invoking to evaluate the classification rules.

- 12. If the rule package name was found, the flow goes to Step 16.
- 13. If the rule package name was not found, this error is attached to user data as a key-value pair with the key IWD\_Rule\_Package\_Determination\_Error.
- 14. If the subroutine fails an error is extracted.
- 15. This error is attached to user data as a key-value pair with the key IWD\_Rule\_Package\_Determination\_Error.
- 16. Delete IWD\_reprioritizeDateTime from attached data.
- 17. Delete RulePhase and IWD\_GRE\_Result before Invoke GRE.
- 18. Check if in\_method\_name = SetBusinessContext.
  - If in\_method\_name is set to SetBusinessContext then the process calls classification rules in GRE.
  - If in\_method\_name is set to Prioritize then the process calls prioritization rules in GRE.
- 19. An ESP request is sent to the Genesys Rules Engine to evaluate the classification rules.
- 20. The ESP result is attached to user data as a key-value pair with the key ---- IWD\_GRE\_Result.

- 21. CheckBusinessValueAndPriority subroutine is called to veriy if IWD\_businessValue and Priority have correct values.
- 22. An ESP request is sent to the Genesys Rules Engine to evaluate the prioritization rules.
- 23. The last Interaction Server-related error is extracted from a variable.
- 24. A check is done to see if the error code is related to the ESP server communication.
- 25. The last error is attached to user data as a key-value pair with the key IWD\_GRE\_Error.
- 26. The last error is attached to user data as a key-value pair with the key IWD\_GRE\_Error. If not, the value of the \_counter variable is incremented by 1.
- 27. A delay is introduced, based on the value of the \_delay\_ms variable. The flow goes back to 18 to retry the connection to the ESP server. The result from the ESP call to the Genesys Rules Engine is attached to the interaction as user data, with the key IWD\_GRE\_Result. This key-value pair will have the following format:

return:ok| NumberOfRulesApplied:<number of applied rules>|
RulesApplied:<rule 1 id> <rule1 name>, <rule2 id> <rule2
name>, ...
The following example shows what the result might look like:
AttributeUserData [list, size (unpacked)=168] = 'ESP\_Result'
[str] =
"return:ok|NumberOfRulesApplied:12|
RulesApplied:McrSlt1GlbClsf1
McrSlt1GlbClassification1, McrSlt1GlbClsf2
McrSlt1GlbClassification2"

- 28. The last error is attached to user data as a key-value pair with the key IWD\_GRE\_Error when in\_method\_name is not set to SetBusinessContext or Prioritize.
- 29. The interaction is placed in the iWD\_ErrorHeld queue.
- 30. Exit InvokeGRE subroutine.

## DetermineESPServerName Subroutine

#### DetermineESPServerName

Flow Summary

Click to enlarge.

Routing Design - DetermineESPServerName	
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\$	
	5 6
if ( key_to_find_in_list_object != ") out_esp_name=ESP name from Li	istObject out_retum_code = 0
_key_to_find_in_list_object=UData[TWD_solutionId]	···· • • • • • • • • • • • • • • • • •
_key_to_find_in_list_object = 'notFound'	out_retum_code = 1 9:
	out_retum_code:           0 - esp server found           1 - esp server not found
<b>▲</b>	• • • • • • • • • • • • • • • • • • •
For Help, press F1	CS: ansi EC: ansi(1250) LOG NUN

## Flow Detail

- 1. Entry to DetermineESPServerName subroutine.
- 2. Initialize variables:
  - \_key\_to\_find\_in\_list\_object—Assign task IWD\_SolutionId.
  - out\_esp\_name—Set its value to empty string.
- 3. Check if \_key\_to\_find\_in\_list\_object is not empty.
- 4. Search \_key\_to\_find\_in\_list\_object in Iwd\_Esp\_List. Result will be assign to out\_esp\_name.
- 5. Check if out\_return\_code is not empty.
- 6. If out\_esp\_name is not empty then set out\_return\_code to 0.
- 7. Assign notFound string to \_key\_to\_find\_in\_list\_object.
- 8. If out\_return\_code is empty then set out\_return\_code to 1.
- 9. Exit DetermineESPServerName subroutine.

## CheckBusinessValueAndPriority Subroutine

## CheckBusinessValueAndPriority

## Flow Summary

#### Click to enlarge.



## Flow Detail

- 1. Entry to the CheckBusinessValueAndPriority subroutine.
- 2. Variables are initialized:
  - out\_return\_code—Return code returned by this subroutine at the exit.
  - \_min\_business\_value—Minimum available business value.
  - \_max\_business\_value—Maximum available business value.
  - \_min\_priority—Minimum available priority.
  - \_max\_priority—Maximum available priority.
- 3. Check if task has set IWD\_businessValue attribute.
- 4. If IWD\_businessValue attribute was not set then it will be set to \_min\_business\_value.
- 5. IWD\_businessValue attribute is attached to the task.
- 6. Check if task has set Priority attribute.
- 7. If Priority attribute was not set then it will be set to \_min\_priority.

- 8. Priority attribute is attached to the task.
- 9. Read IWD\_businessValue attribute from the task and put it in \_iwd\_business\_value variable.
- 10. Check if \_iwd\_business\_value is leass than \_min\_business\_value. If true then flow goes to 4.
- 11. Check if \_iwd\_business\_value is greater than \_max\_business\_value.
- 12. If \_iwd\_business\_value is greater than \_max\_business\_value then set \_iwd\_business\_value to \_\_max\_business\_value.
- 13. Read Priority attribute from the task and put it in \_iwd\_priority variable.
- 14. Check if \_iwd\_priority is less than \_min\_priority. If true then flow goes to 7.
- 15. Check if \_iwd\_priority is geater than \_max\_priority.
- 16. If \_iwd\_priority is reater than \_max\_priority then set \_iwd\_priority to \_max\_priority.
- 17. Check if \_iwd\_business\_value and \_iwd\_priority are in range of allowed values.
- 18. If \_iwd\_business\_value and \_iwd\_priority are out of scope then out\_return\_code will be set to 1.
- 19. Exit CheckBusinessValueAndPriority subroutine.

## DetermineRulePackageName Subroutine

## DetermineRulePackageName

Flow Summary

Click to enlarge.

😥 Routing Design - DetermineRulePackageName	
Eile Edit View Iools Help	
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〒 Q ♦ ● :: □ • - +   □   ■   ■ Q   1 1	▋▋▋₽₽₽₽₽₽₽₽₽₽₽₽₽₽₽₽₽₽₽₽₽₽₽₽₽₽₽₽₽₽₽₽₽₽₽₽
i	5
if (_key_to_find_in_list_object != ") out_package_name=package na	ame from ListObject out_return_code = 0
_key_to_find_in_list_object=UData[IWD_solutionId']	
key_to_find_in_list_object = 'notFound'	out_retum_code = 1
	out_returm_code:
	0 - package found 1 - package not found
	<u>۰</u>
For Help, press F1	CS: ansi EC: ansi(1250) LOG NUM

## Flow Detail

- 1. Entry to DetermineRulePackageName subroutine.
- 2. Initialize variables:
  - \_key\_to\_find\_in\_list\_object—Assign task IWD\_SolutionId.
  - out\_package\_name—Set its value to empty string.
- 3. Check if \_key\_to\_find\_in\_list\_object is not empty.
- Search \_key\_to\_find\_in\_list\_object in Iwd\_Package\_List. Result will be assign to out\_package\_name.
- 5. Check if out\_return\_code is not empty.
- 6. If out\_package\_name is not empty then set out\_return\_code to 0.
- 7. Assign notFound string to \_key\_to\_find\_in\_list\_object.
- 8. If DetermineRulePackageName is empty then set out\_return\_code to 1.
- 9. Exit DetermineRulePackageName subroutine.

# Changes to IWDBP Strategies & Subroutines in 8.5.105

These topics describe changes made to the IWD Business Process for IRD in IWD release 8.5.105. Where strategies and subroutines are not referenced below, they remain the same as for release 8.5.104.

## Classification Strategy

## Classification Strategy

The purpose of this strategy is to invoke corresponding classification rules, analyze the result of the rules application and place the interaction into the appropriate queue, depending on the result.

This strategy processes interactions from the following queues:

- iWD\_New—Interactions have to satisfy the following conditions:
  - There are no conditions here.
  - Interactions are taken in order they were submitted.

ie 'All' I	nteraction	Queue	View Proper	rties	
General	Condition	Order	Scheduling	Parameterized Conditions	Dat.
					*
					_

#### Changes in 8.5.105

Code has been refactored and removed to the InvokeGRE and InvokeUCS strategies in order to simplify them.

## Flow Summary

Click to enlarge.

🔅 Routing Design - Classification	
Eile Edit View Tools Help	
🍰 🖬 ở ở   X 🖻 🖻 🥔 🏘 🚺 🔽 🔽 📘	*) 🕪 🐨 🗏 f 🖉 🍓 🔤 🖶 🖧 🖳
<b>₽</b> Q() () () () () () () () () () () () () (	
1       3       4         2:       Invoke UCS       Invoke GRE         Image: Set interaction age for sorting inside of internal URS queue;       Image: Set interaction age for sorting inside of internal URS queue;         5:       5:	
· · · · · · · · · · · · · · · · · · ·	•
For Help, press F1	CS: ansi EC: ansi(1250) LOG NUM

#### Flow Detail

- 1. Entry to the Classification strategy.
- 2. A command is sent to URS to use the interaction age while sorting interactions in internal queues.
- 3. The InvokeUCS subroutine is invoked to create a new interaction in the UCS database.
- 4. The InvokeGRE subroutine is invoked.
- 5. Exit Classification strategy.

## Prioritization Strategy

## Prioritization Strategy

The purpose of this strategy is to invoke the corresponding prioritization rules, analyze the result of the rules application and place the interaction into the appropriate queue, depending on the result.

This strategy processes interactions from the following queues:

• iWD\_Captured—Interactions have to satisfy the following conditions:

- Active interactions only (interactions which do not have the property IWD\_activationDateTime set, or this property has a time stamp which is in the past.
- Interactions are taken in the order they were submitted.

General Condition Order	Scheduling	Parameterized Conditions	Data 4
	1		
ID: (D) and the Date There			
IWD_activationDateTime OR	is null		-

#### Active Interactions only

- iWD\_Queued—Interactions have to satisfy the following conditions:
  - Interactions that are subject for immediate reprioritization (interactions that have the property IWD\_reprioritizeDateTime set to a time stamp which is in the past)
  - Interactions are taken in order of IWD\_reprioritizationDateTime (oldest first).

General	Condition	Order Scheduling Parameterized Cor	nditions   Data
_	nt lime() \=		-
10.000	nt time()>=	IWD reprioritizeDateTime	

#### For reprioritization

#### Changes in 8.5.105

Code has been refactored and removed to the InvokeGRE and InvokeUCS strategies in order to simplify them.

## Flow Summary



## Flow Detail

- 1. Entry to the Prioritization strategy.
- 2. The InvokeGRE subroutine is invoked.
- 3. Exit Prioritization strategy.

## Distribution Strategy

## Distribution Strategy

This strategy routes interactions to a requested Agent, requested Agent Group, requested Skill, or to the default iWD Agent Group, and can now process an IWD\_Segment attribute from the segmentation settings.

This strategy processes interactions from the following queues:

- iWD\_Queued—Interactions have to satisfy the following conditions:
  - Interactions that are not subject for immediate reprioritization (interactions that do not have the property IWD\_reprioritizeDateTime set, or that have this property set to a time stamp that is in the future).
  - Interactions are taken in order of priority (highest priority first)

#### Changes in 8.5.105

Segmentation settings have been added to the **ToDistribute** View in the Distribution strategy, enabling it to make a call to the configured segments then add an **IWD\_Segment** attribute to the interaction data. See **the 8.5.105 diagram here** and the **feature description here**.

## Flow Summary



## Flow Detail

- 1. Entry to the Distribution strategy.
- 2. Extract information about requested agent, agent group, or skill and initialize internal variables.

veral	1		
Assi	gn		
z	×		<u>E</u> dit Variable
	Name	Expression	
1	_requested_agent_grou	UData[TWD_ext_requestedAgentGroup']	
2	_ion_priority	UDataINT['Priority']	
3	_requested_agent	UData['TWD_ext_requestedAgent']	
4	_requested_skill	UData[TWD_ext_requestedSkill]	
5	_currentDT_int	GetUTC[]	
6	_reprioritizeDT_str	UData[TWD_reprioritizeDateTime']	
7	_reprioritizeDT_int	UTCFromString[_reprioritizeDT_str]	

Multi-Assign - Requested Agent and Skill

- 3. A calculation is done to determine the timeout—how long the interaction should wait for a target to become available.
- 4. If the reprioritize time was set up and the calculated timeout is less than or equal to the default timeout (1 hour, see Step 1), then the timeout remains as it is.
- 5. If the reprioritize time was not set, or the calculated timeout is greater than the default timeout, then the waiting timeout is set to the default (1 hour).
- 6. Analysis is done to determine whether an agent was requested.
- 7. If an agent was requested, the URS variable is prepared (.a is added).
- 8. Update the IWD\_segment attribute to '\_requested\_agent'.

The 'To distribute' Interaction (	Queue View Pro	perties	X
Scheduling Parameterized Co	nditions Databa	ase Hints Segm	nentation
	Add	Edit	Remove
IWD_ext_request			
Limits Total 200	Default per seç	gment 100	
Check Interval (sec)			

#### Segmentation view

9. Try to route the interaction to the requested agent without waiting.

iteraction Queue Targ	get Selection	
Statistics CMin Name CMax		1
Targets	-	
Targets ≝ 🗙 🔽 Clear	Target Timeout 0	▼ Sec
Targets	Target Timeout 0	▼ Sec

#### Route to agent

- 10. Update the IWD\_segment attribute to '\_requested\_skill'.
- 11. Try to route the interaction to an agent with the requested skill without waiting.

Interaction Qu	eue Target	Selection	
Statistics Min Max	Name [	StatAgentLoading	<u>*</u>
Targets	🗂 Cļear Ta	rget Timeout 0	💌 Sec
1	Гуре	Name	StatServer
1 Skill		_requested_skill >	3

#### Route to Skill

- 12. Analysis is done to determine whether an Agent Group was requested.
- 13. If an Agent Group was requested, the URS variable is prepared (.ga is added).
- 14. Update the IWD\_segment attribute to '\_requested\_agent\_group'.
- 15. Try to route the interaction to the requested Agent Group with wait time set to \_waitTargetTimeout.

teraction Queu	e Target Selection	
Statistics Mjn N. Max	ame StatAgentLoading	2
Targets 2∰ 🗙 Г	Clear Target Timeout 0	<b>▼</b> Sec
Туре	Name	StatServer
	requested agent group	

#### **Route to Requested Agent Group**

- 16. Update IWD\_segment attribute to '\_default'.
- 17. Try to route the interaction to the iWD agent group with a a wait time to \_waitTargetTimeout.

teraction Queue	arget Selection	
Statistics		
• Min	-	
C Max	StatAgentLoading	
-		
- lanete		
		17
📸 🗙 🔽 Clea	ar Target Timeout	waitTargetTim 💌 Sec
Z X V Clea	ar Target Timeout	waitTargetTim 💌 Sec StatServer

#### Route to Agent Group

- 18. Get the last error.
- 19. Verification is done as to why the target was not found.
- 20. An error code is attached in case of any error other than a timeout. If more than one target is available, URS uses the StatAgentsLoading statistic to select the Agent who has the minimum load (this applies to routing to Skills and routing to Groups only; routing to a requested Agent does not use statistics). For more information about this statistic, see the Universal Routing 8.1 Reference Manual. The Route Interaction object also has an Interaction Queue tab. (This applies to all three Route Interaction

objects in this strategy.)

eraction Queue   Target Selection	
Queue for Existing Interaction	
z X	
Queues	Description
IWDBP.iWD_Completed(/WD_Complete	<b>9</b>
IWDBP.IWD_Completed(/WD_Complete Queue for New Interaction	<b>9</b>

#### **Route Interaction Properties—Interaction Queue**

The optional Interaction Queue tab enables you to specify two types of queues:

- Queues for existing interactions (the queue in which the interaction should be placed after the agent is done working with it).
- Queues for new interactions (the queue in which new interactions created by the agent should be placed).

A Description (optional) appears as a hint on the agent desktop as to where to place the interaction.

• Exit from the Distribution strategy.

## Invoke GRE Strategy

#### Invoke GRE Strategy

#### Changes in 8.5.105

Code has been removed from Classification and Prioritization strategies to the InvokeGRE strategy to simply the overall business process.

## Flow Summary

#### Part 1

Click to enlarge.



#### Part 2

![](_page_42_Figure_6.jpeg)

## Flow Detail

- 1. Entry to InvokeGRE strategy.
- 2. Check if in\_method\_name is set to SetBusinessContext or Prioritize.
- 3. A variable is initialized—\_delay\_ms specifies the delay (in milliseconds) between attempts to invoke rules.
- 4. The DetermineESPServerName subroutine is invoked to determine the name of the Genesys Rules Engine Application. The subroutine uses the List Object list GREServerList.
- 5. If the subroutine was successful, a check is done to ensure the existence of the ESP server name that was returned by the subroutine. If the ESP server name was found, the flow goes to 10. The DetermineRulePackageName subroutine is invoked to determine the name of the rule package that the Genesys Rules Engine will be invoking to evaluate the classification rules.
- 6. If the ESP server name was not found, this error is attached to user data as a key-value pair with the key IWD\_GRE\_Determination\_Error.
- 7. The interaction is placed in the iWD\_ErrorHeld queue.
- 8. If the subroutine fails an error is extracted.
- 9. This error is attached to user data as a key-value pair with the key IWD\_GRE\_Determination\_Error.
- Check if in\_custom\_package\_name was published to this subroutine. If it is set then in\_custom\_package\_name will be run. Otherwise package name needs to be found in Iwd\_Package\_List.
- 11. Assign in\_custom\_package\_name to \_gre\_package\_name and set \_return\_code to 0.

11a. The DetermineRulePackageName subroutine is invoked to determine the name of the rule package that the Genesys Rules Engine will be invoking to evaluate the classification rules. If the rule package name was found, the flow goes to Step 16.

- 12. If the rule package name was found, the flow goes to Step 16.
- 13. If the rule package name was not found, this error is attached to user data as a key-value pair with the key IWD\_Rule\_Package\_Determination\_Error.
- 14. If the subroutine fails an error is extracted.
- 15. This error is attached to user data as a key-value pair with the key IWD\_Rule\_Package\_Determination\_Error.
- 16. Delete IWD\_reprioritizeDateTime from attached data.
- 17. Check if in\_method\_name = SetBusinessContext.
  - If in\_method\_name is set to SetBusinessContext then the process calls classification rules in GRE.
  - If in\_method\_name is set to Prioritize then the process calls prioritization rules in GRE.
- 18. An ESP request is sent to the Genesys Rules Engine to evaluate the classification rules.
- 19. The ESP result is attached to user data as a key-value pair with the key IWD\_GRE\_Result.
- 20. Check if IWD\_reprioritizeDateTime was changed by rules.

- 21. Delete IWD\_reprioritizeDateTime from interactin if it was not changed by rules.
- 22. Invoke CheckBusinessValueAndPriority subroutine to verify if IWD\_businessValue and Priority have correct values.
- 23. Check if in\_method\_name = Prioritize.
- 24. Check if Priority was changed by rules in Prioritization.
- 25. Attach IWD\_Prioritization\_Error to interaction with message Priority is not set up by rules.
- 26. The interaction is placed in the iWD\_Queued queue.
- 27. An ESP request is sent to the Genesys Rules Engine to evaluate the prioritization rules.
- 28. The last Interaction Server-related error is extracted from a variable.
- 29. A check is done to see if the error code is related to the ESP server communication.
- 30. The last error is attached to user data as a key-value pair with the key IWD\_GRE\_Error.
- 31. Check if Department/Process is active.
- 32. Check if business process was assigned.
- 33. The interaction is placed in the iWD\_Captured queue.
- 34. The last error is attached to user data as a key-value pair with the key IWD\_GRE\_Error. If not, the value of the \_counter variable is incremented by 1.
- 35. A delay is introduced, based on the value of the \_delay\_ms variable. The flow goes back to 18 to retry the connection to the ESP server. The result from the ESP call to the Genesys Rules Engine is attached to the interaction as user data, with the key IWD\_GRE\_Result. This key-value pair will have the following format:

```
return:ok| NumberOfRulesApplied:<number of applied rules>|
RulesApplied:<rule 1 id> <rule1 name>, <rule2 id> <rule2
name>, ...
```

The following example shows what the result might look like:

```
AttributeUserData [list, size (unpacked)=168] = 'ESP_Result'
[str] =
"return:ok|NumberOfRulesApplied:12|
RulesApplied:McrSlt1GlbClsf1
McrSlt1GlbClassification1, McrSlt1GlbClsf2
McrSlt1GlbClassification2"
```

- 36. The interaction is placed in the iWD\_Captured queue.
- 37. Exit InvokeGRE subroutine.
- 38. The last error is attached to user data as a key-value pair with the key IWD\_GRE\_Error when in\_method\_name is not set to SetBusinessContext or Prioritize.
- 39. The interaction is placed in the iWD\_ErrorHeld queue.
- 40. Exit InvokeGRE subroutine.

#### FindListObjectItem Subroutine

## FindListObjectItem Subroutine

This subroutine amalgamates two subroutines that were previously separate in release 8.5.104:

- DetermineESPServerName
- DetermineRulePackageName

## Flow Summary

Click to enlarge.

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▋█Q;♦⊙\$}⊠⊑∞₽ □ □ □ ₽ 0;€	
1         if (_key_to_find_in_list_object != ")	
Out_item_name=       item_from in_list_nam	ne 5 out_return_code = 0
karr to find in list object=	6
UData[IWD_solutionId']	
	out_return_code = 1
	0 - item found
	1 - item not found
4	•
For Help, press F1	CS: ansi EC: ansi(1250) LOG NU

## Flow Detail

- 1. Entry to FindListObjectItem subroutine.
- 2. Initialize variables:
  - \_key\_to\_find\_in\_list\_object—Assign task IWD\_SolutionId.
  - out\_item\_name—Set its value to empty string.

- 3. Check if \_key\_to\_find\_in\_list\_object is not empty.
- 4. Search \_key\_to\_find\_in\_list\_object in in\_list\_name. Result will be assigned to out\_item\_name.
- 5. Check if out\_esp\_name is empty.
- 6. Set out\_return\_code to 0.
- 7. Set out\_return\_code to 1.
- 8. Exit FindListObjectItem subroutine

# IWDBP Main Process Diagram

## 8.5.105

The screenshot below shows the entire business process as it appears in the Interaction Design window of Interaction Routing Designer in release 8.5.105. Click to expand the graphic.

![](_page_47_Figure_4.jpeg)

Items in orange are new in release 8.5.105.

## 8.5.104

The screenshot below shows the entire business process as it appears in the Interaction Design window of Interaction Routing Designer in release 8.5.104. Click to expand the graphic.

![](_page_48_Figure_1.jpeg)

Items in orange are new in release 8.5.104. Click to expand the graphic.

![](_page_48_Figure_3.jpeg)

# Configuring List Objects

The iWD Business Process (IWDBP) uses two Configuration Server List Objects.

- The first List Object, Iwd\_Esp\_List, has two lists:
  - The first maps the iWD Solution ID to the name of the Genesys Rules Engine application.
  - The second maps the iWD Solution Runtime ID to the name of the Universal Contact Server (UCS) application. This is optional, and is used to allow the business logic in IWDBP to update the interaction record in the UCS database to mark the interaction as done (that is, the value of the Status column in the Interaction table will be set to 3) when it enters the iWD\_Completed, iWD\_Rejected, or iWD\_Canceled queues.
- The second List Object, Iwd\_Package\_List, maps the iWD Solution ID to the rules package that will be evaluated when the Genesys Rules Engine is invoked from the IWDBP business process.

Both of these List Objects must be correctly configured for IWDBP to work.

One business process can serve several solutions under the same tenant. The iWD Setup Utility automatically creates these two List Objects for the Solution you indicate in the Setup Utility in the IWD GAX Plug-in. In environments with only one solution, no further configuration needs to be done on the List Objects. If you have multiple solutions (or add one at a later time) these two List Objects need to be updated.

#### lwd\_Esp\_List

#### GREServerList

The GREServerList list looks like a list of pairs:

Solution_1	GREApplication_1
Solution_2	GREApplication_2
Solution_3	GREApplication_3

Where the Solution ID is the key, and the name of the Genesys Rules Engine Application is the value.

#### ContactServerList

The ContactServerList list looks like a list of pairs:

iWD Solution Runtime\_1

ContactServer\_1

iWD Solution Runtime_2	ContactServer_2
iWD Solution Runtime_3	ContactServer_3

Where iWD Solution Runtime ID is the key and the name of a Universal Contact Server associated with Interaction Server is the value.

#### Important It is very important that the pairs are set up correctly. If, for example, Solution\_1 is mapped to ESPService\_2 instead of to ESPService\_1, business rules for Solution\_2 will be applied to all interactions which were submitted by Capture Points from Solution\_1. Similar issues will occur if the Genesys Rules Engine application or the Universal Contact Server application are incorrectly mapped.

These key-value pairs in a List Object need to be set up only once per tenant, and can be configured in Interaction Routing Designer (IRD) or Genesys Administrator.

G	Senesys Administrator		Tenant: mcr810	P New
DEPL	DYMENT OPERATIONS			
> Tra	> Transactions			
Tra	Transactions			
<b>£</b>	🔹 🛅 New 💁 New Folder 📝 Edit 🙀 Remove	. 📷 Change state 🔁 Move to		66
	Name 🔺	Туре	State	
7	Filter	List	Filter	
View: 🔝 Root > 🦳 Transactions				
	lwd_Esp_List	List	Enabled	
	lwd_Package_List	List	Enabled	
	WebCallback	List	Enabled	

List Objects in IRD

Genesys Administrator		Tenant: mcr810	🔎 New Window   Log out   🎯 🕶   😧
DEPLOYHENT OPERATIONS			
> Transactions > Iwd_Esp_List			
Iwd_Esp_List - \Transactions\			
🗙 Cancel 🛃 Save & Close 🍃 Save 🛃 Save & New 🛛 🔀 Reload			
Configuration Options Permissions			
💼 New 🙀 Delete 💆 Export 🍒 Import			View: Advanced View (Annex)
Name A	Section	Option	Value
T Filter	Filter	Filter	Filter
GREServerList (1 Item)			
GREServerList/ACME_I	GREServerList	ACME_I	GenesysRulesEngine

#### **List Object Details**

#### Iwd\_Package\_List

The Iwd\_Package\_List List Object is used to correlate the IWD Solution ID (IWD\_SolutionId) to the name of the rule package that will be evaluated when requests are made to the Genesys Rules Engine from the IWDBP business process.

The Iwd\_Package\_List List Object contains a single list, RulePackageList. Create a new key/value pair for each iWD Solution that you have configured under your Configuration Server tenant, where the key or option is the IWD Solution ID and the value is the *Package Name* of the rules package.

![](_page_51_Figure_6.jpeg)

iWD Package List

# Cloning the IRD iWDBP to Create New Business Processes

For details on exporting objects from and importing objects to IRD, see **Universal Routing 8.1 Business Process User's Guide**.

To clone an iWDBP in this way, you must have the Genesys Deployment Agent (GDA) running.

## Cloning Using GAX's iWD Setup Utility - Recommended

#### Cloning the iWD Business Process with iWD Setup Utility

iWD allows you to create more than one iWD business process (or complete interaction workflows) in one tenant. For example, interactions from different media types can be handled by separate business processes. The iWD Setup Utility helps with quick creation of a new business process (BP) based on the existing iWD Business Process (IWDBP). To clone the IWDBP, the high-level process is as follows:

- 1. Export the existing BP to a file.
- 2. Export the existing interaction strategies to XML files.
- 3. Run iWD Setup Utility to modify the business process and strategies.
- 4. Load the modified strategy XML files.
- 5. Load the original business process.

A detailed procedure is below.

#### Warning

If this procedure is not executed correctly, the BP is likely to break or be inconsistent.

#### Preparation

- 1. Open the IWDBP in Interaction Routing Designer (IRD).
- 2. Export the IWDBP to a file, for example, IWDBP\_orig.wie.
- 3. Deactivate all the strategies in the IWDBP.
- 4. In the IRD main window, export all the strategies and subroutines as XML files and save them in the

same directory.

5. Close IRD.

![](_page_53_Picture_3.jpeg)

#### Running iWD Setup Utility

- 6. In GAX choose Administration > Solution Definitions >iWD Setup Utility.
- 7. Choose **Run Profile: Customize IWDBP**. Then select the IWDBP and start the cloning process, as shown on the sequence of GAX dialogs below (click to enlarge).

![](_page_53_Picture_7.jpeg)

8. Follow the steps of the installer, providing all the necessary data.

#### Important

The Run Profile: Customize BP script has the following restrictions:

- It works only with Windows hosts.
- New queue names can be created only by adding a common suffix.
- The name suffix may contain only English alphanumeric, underscore and dash

characters.

- A new business process name may contain the same set of characters with the addition of a space.
- The name suffix may have up to 29 characters.
- The new BP name may have up to 99 characters.

#### Updating iWD Routing Strategies

- 9. For all iWD routing strategies and subroutines:
  - Import the modified XML file in the IRD main window (modified strategies are saved by iWD Setup Utility with new file names: for example, Classification\_custom.xml). Answer OK to the warning message about overwriting the existing script.
- 10. Open the BP in IRD.
- 11. Save the BP.

#### **Restoring the Original Business Process**

- 12. In IRD, import the previously exported file (IWDBP\_orig.wie).
- 13. Activate the strategies in both BPs.

#### Manual Cloning Process

## Cloning the iWD Business Process Using Configuration Manager

iWD allows you to create more than one iWD business process (or complete interaction workflows) in one tenant. For example, interactions from different media types can be handled by separate business processes. To clone the IWDBP, the high-level process is as follows:

- 1. Export the existing BP to a file.
- 2. Rename the BP.
- 3. Rename queues, views, submitters and strategies in the configuration database.
- 4. Rename queues in strategies and the BP.
- 5. Load the original business process.

A detailed procedure is below.

#### Warning

If this procedure is not executed correctly, the BP is likely to break or be inconsistent.

#### Preparation

- 1. Open the IWDBP in Interaction Routing Designer (IRD).
- 2. Export IWDBP to a file, for example, IWDBP\_orig.wie.
- 3. Deactivate all the strategies in the IWDBP.
- 4. Change the name of the IWDBP (for example, IWDBP\_custom).
- 5. Close IRD.

#### **Renaming objects**

- 6. Open Configuration Manager.
- 7. For the IWDBP object ([tenant]/Scripts/IWDBP):
  - a. Change the name to the same name as in IRD.
  - b. Change Annex/Namespace/Name to the same new name.
- 3. For all iWD queues (iWD\_Canceled, iWD\_Captured, iWD\_Completed, iWD\_ErrorHeld, iWD\_New, iWD\_Queued, iWD\_Rejected):
  - a. Rename the script (for example, iWD\_Canceled\_custom)
  - b. Change **Annex > Namespace > Name** to the same new name.
  - c. Change Annex > Namespace >BusinessProcess to the new BP name (for example, IWDBP\_custom).
- 4. For all iWD views (with names starting with queue names, for example iWD\_Canceled/Mark as Done):
  - a. Rename the script consistently with the corresponding queue (iWD\_Canceled\_custom/Mark as Done).
  - b. Change Annex > View> Queue to the new name of the corresponding queue (for example, iWD\_Canceled\_custom).
- For all iWD strategies (Classification, Distribution, MarkInteractionAsDone, Prioritization, Removal) and subroutines (DetermineESPServerName, DetermineRulePackageName, CheckBusinessValueAndPriority):
  - a. Rename the script (for example, Classification\_custom).
  - b. Change all queue and subroutine names in Annex > CFGScript (for example, name: 0, value: iWD\_ErrorHeld\_custom).
  - c. Change all subroutine names in **Annex > Subroutines** (for example, name: 0, value: DetermineESPServerName\_custom).
  - d. For all iWD submitters (with names starting with iWD views):
    - i. Rename the script (iWD\_Canceled\_custom/Mark as Done/-

/MarkInteractionAsDone\_custom).

- ii. Change Annex > Submitter > Strategy consistently with the corresponding strategy (for example, MarkInteractionAsDone\_custom).
- iii. Change Annex > Submitter >View consistently with the corresponding view (for example, iWD\_Canceled\_custom/Mark as Done).
- d. For the BPscript:
  - i. Change all the iWD queues in **Annex > Queues** to the new names.
  - ii. Change all the iWD strategies in **Annex > Strategies** to the new names.
  - iii. Change all the iWD submitters in **Annex > Submitters** to the new names.
  - iv. Change all the iWD views in **Annex > Views** to the new names.

#### **Modifying iWD Routing Strategies**

- e. For all iWD routing strategies:
  - i. Open the strategy in IRD.
  - ii. For all Call subroutine properties objects edit the Subroutine name property and set it to the appropriate new subroutine name. Remember to properly set Input parameters and Output parameters.
  - iii. For all **Queue Interaction** objects edit the Interaction Queue property and set it to the appropriate new queue name.
  - iv. (Distribution strategy only) For all **Route Interaction** objects edit the Interaction Queue/ Queue for Existing Interaction/Queues property and set it to the new name for the iWD\_Completed queue (that is, iWD\_Completed\_custom).
  - v. Save the strategy using the new strategy name. Choose the original **RBN File Path** where the BP was imported.
- f. Save all iWD subroutines using the new subroutine name. Choose original **RBN File Path** where the BP was imported.
- g. Save the BP.

#### **Restoring the original business process**

- h. In IRD import the previously exported file (IWDBP\_orig.wie).
- i. Activate the strategies in both business processes.

#### Important

Subroutines can be shared between business processes until there is a need to change them separately.

## Additional Configuration

## Additional Configuration

## Interaction Queues

iWD recognizes seven interaction queues. By default they are created by the standard iWD business process (IWDBP) and have the following names in the IWD Business Process for IRD:

- iWD\_New
- iWD\_Captured
- iWD\_Queued
- iWD\_Completed
- iWD\_Rejected
- iWD\_Canceled
- iWD\_ErrorHeld

If there is more than one business process, customized queues must be configured for each solution in the iWD GAX Plug-in. The set of allowed queues is taken from all defined business processes. The names of the chosen queues will then be used by both iWD Manager and iWD Data Mart instead of the default ones.

#### Adding Custom Queue Names to Interaction Server

You must also ensure that the names of all customized queues for completed tasks are added to the list of queue names in Interaction Server in the **completed-queues** option.

Select the newly created business process in iWD Manager and click the **Configure Ixn Custom Properties** feature in iWD Manager. See also **Configuring Customer Interaction Properties**.

#### Filters

Pre-defined filters on the Global Task List have explicit queue names in their conditions. When custom queues are defined, it is necessary to update filters' criteria with generic queue names instead of explicit ones. For example, the filter criterion Queue is iWD\_Completed or Queue is iwd\_bp\_comp.Main.iWD\_Completed should be changed to Queue is Completed. After such a change the filter will work correctly in all solutions with defined custom queues for completed tasks.

The following filter criteria support generic queue names:

- Queue is '{queue}',
- Queue is not '{queue}'.

When you choose one of these criteria in the **Filters** page of iWD Manager, a drop-down list appears in place of '{queue}'. There are seven generic queue names available on the list:

- Canceled
- Captured
- Completed
- ErrorHeld
- New
- Queued
- Rejected

and a special value, "(Custom...)". When "(Custom...)" is selected, an edit box appears that allows you to write an explicit queue name.

## Integrated Capture Points

Integrated Capture Points' options must be set accordingly so that they can put new or modified interactions in the correct interaction queues. When an integrated Capture Point is connected with an iWD solution, its options are automatically synchronized with the solution. The following options are updated in Capture Points to work with a customized iWD business process:

#### JMS Capture Point and File Capture Point

- inbound-transformer-parameters
  - CancelQueues
  - CompleteQueues
  - RestartQueues
- outbound-transformer-parameters
  - CancelQueues
  - CompleteQueues
  - ErrorHeldQueues
  - RejectQueues
  - RestartQueues

#### Web Service Capture Point and Database Capture Point

- iwd-parameters
  - CancelQueues
  - CompleteQueues
  - ErrorHeldQueues
  - RejectQueues
  - RestartQueues

#### All Capture Points

- default-values
  - Queue

The following mapping between configured queues and Capture Points' options is maintained.

<b>Capture Point Option</b>	iWD Solution's Queue	Default Value in IRD
default-values/Queue	New	iWD_New
RestartQueues	New	iWD_New
CompleteQueues	Completed	iWD_Completed
RejectQueues	Rejected	iWD_Rejected
CancelQueues	Canceled	iWD_Canceled
ErrorHeldQueues	Error Held	iWD_ErrorHeld

The options are updated whenever a user changes any of the queues in the iWD Solution configuration in GAX. They are also modified when a user changes the assigned Solution in the Capture Point's configuration in GAX. If no Solution has been assigned to the Capture Point, the queue options can be set manually.

# Modifying the iWDBP

For most environments, the only modification that will need to be made to the iWD Business Process is to the Distribution strategy. The recommended approach to doing this is:

- 1. Add a new strategy into the iWD Business Process
- 2. Replace the connection from iWD\_Queued/All view to the Distribution routing strategy with a connection from iWD\_Queued to your own routing strategy where distribution logic is described.
- 3. Link your new distribution strategy to the out of the box iWD\_Completed queue.

By modifying the business process in this way, rather than simply updating the provided Distribution strategy, you can easily import any new versions of the iWD Business Process that might be available in the future (the links will have to be re-established to your own distribution strategy).

You can also add additional interaction queues into the IWDBP business process, based on your business requirements. However, keep the following points in mind:

- The iWD\_Queued queue (or its equivalent defined in the Solution configuration) must be present for Data Mart to properly count interactions/tasks. You can add other queues to the business process, but only after interactions have passed through the iWD\_Queued queue.
- Data Mart can properly determine when to consider a task as complete, only if the final queue in the business process is one of the following:
  - iWD\_Rejected
  - iWD\_Canceled
  - iWD\_Completed

or their equivalents defined in the Solution configuration.