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iWD Web Help

intelligent Workload Distribution 8.5.1

Table of Contents

iWD Web Help	3
How do I create an iWD spreadsheet template to download?	5
How do I upload tasks to iWD?	9
How can I create and view iWD spreadsheet upload jobs?	11

iWD Web Help

What's New in iWD Web?

Background

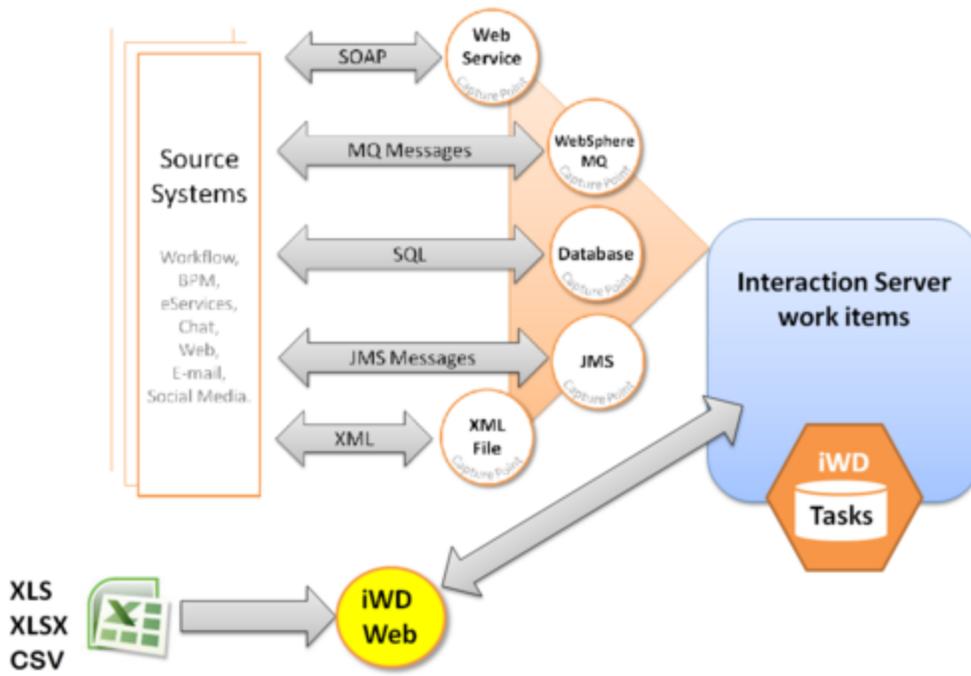
iWD accepts work, in electronic format, from a broad range of applications like customer relationship management (CRM), workflow, document management, legacy/host systems as well as e-mail, chat, SMS and social media servers from the Genesys eServices suite. Once work items are captured, the capture adapter sends them to Genesys Interaction Server for processing.

Before iWD Web, capturing work items has always been handled either by out-of-the-box capture adapters like a Web service interface, XML and IBM WebSphere MQ adapters, or by Genesys eServices equivalents.

What's new?

iWD Web is a web-based, easy-to-deploy workload management solution. It enables organizations to automate and optimize the distribution and handling of tasks and increase workforce efficiency. Purpose-built to deliver rapid time to value, it provides the capability to upload task lists without the need to connect to other source systems, such as CRM, ERP, and legacy systems, leveraging export functionality commonly available to business users.

Instead of having to rely on manual task distribution to your team via spreadsheets (and also CSV files,) or team members having to pick their next work item manually from a CRM, ERP, or legacy system, iWD Web enables you to create new lists with task definitions based on data that business or operations managers can upload from .CSV, .XLS and .XLSX files. You can use your CRM, ERP, or legacy system's export to spreadsheet/CSV file feature to download a list of work items that your team needs to work on and import that file to iWD Web, which reads and treats every line of your spreadsheet as a task to be analyzed and properly distributed to your available team members.



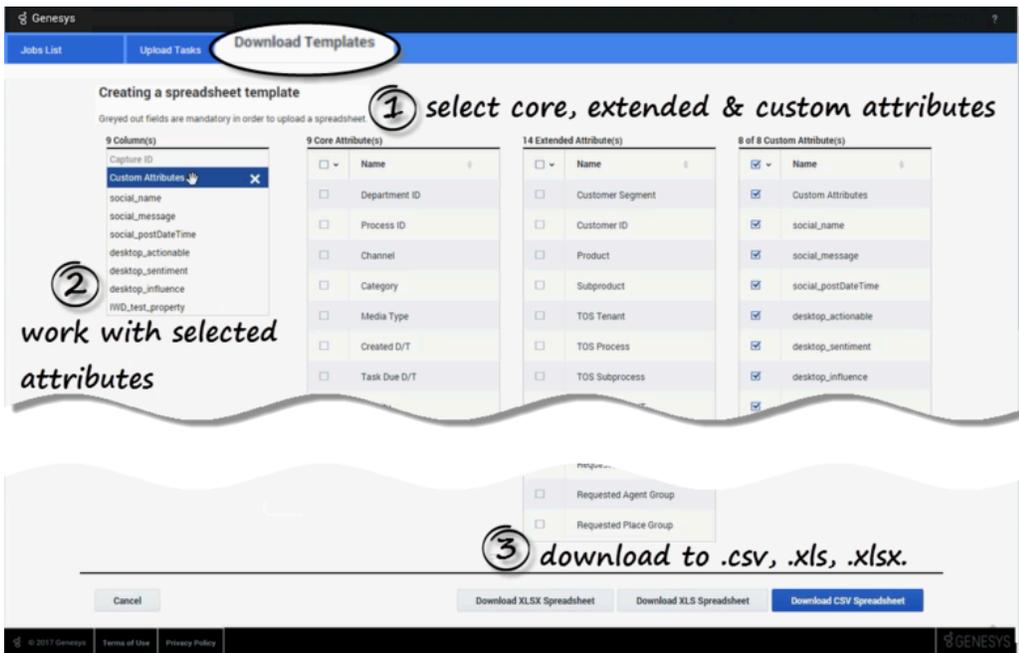
Basic process for creating/uploading a spreadsheet

1. Create and download a spreadsheet template that defines the attributes (column headings in the spreadsheet) of the tasks you will later upload.
2. Populate the spreadsheet with tasks from your non-Genesys-integrated external business systems.
3. Upload the spreadsheets containing tasks directly to Genesys Interaction Server and iWD.
4. Monitor the status of the task upload jobs.



How do I create an iWD spreadsheet template to download?

To create and download a template



1. Select core, extended, and custom attributes for your spreadsheet template. These attributes will form the column headings in downloaded spreadsheets that are based on the template you are creating.
2. Refine your selection by working with the attributes listed in the left column. You can re-order them by drag-and-drop, or delete them either in groups or individually. Note that CaptureID is protected—you can't select it.
3. When your attributes list is complete and correctly ordered, select one of the download options—either .CSV, .XLS or .XLSX.

Important

An iWD Web application reads the values for priority, process_id and department_id from corresponding fields in its [ixn] configuration section when files are uploaded using the Web interface. Any values in imported spreadsheet files for these attributes will be ignored.

How do I create an iWD spreadsheet template to download?

Task attributes details

[+] CORE

Label	Task Attribute	Column Name in Interactions Table	Type	Interaction Attached Data Key
Core Attributes				
Capture ID (protected)	CaptureId	external_id	String	ExternalId
Department ID	DepartmentId	IWD_departmentId	String	IWD_departmentId
Process ID	ProcessId	IWD_processId	String	IWD_processId
Channel	Channel	IWD_channel	String	IWD_channel
Category	Category	IWD_category	String	IWD_Category
Media Type	mediaType	media_type	String	MediaType
Created D/T	CreatedDateTime	received_at	Timestamp	ReceivedAt
Task Due D/T	DueDateTime	IWD_dueDateTime	Timestamp	IWD_dueDateTime
Priority	Priority	priority	Integer	Priority
Business Value	BusinessValue	IWD_businessValue	Integer	IWD_businessValue

[+] EXTENDED

Label	Task Attribute	Column Name in Interactions Table IWD_ext +...	Type	Interaction Attached Data Key IWD_ext +...
Extended Attributes				
Customer Segment	CustomerSegment	customer Segment	String	customer Segment
Customer ID	CustomerId	customerId	String	customerId

How do I create an iWD spreadsheet template to download?

Label	Task Attribute	Column Name in Interactions Table IWD_ext +...	Type	Interaction Attached Data Key IWD_ext +...
Product	Product Type	product Type	String	product Type
Subproduct	Product Subtype	sourceProduct Subtype	String	product Subtype
TOS Tenant	SourceTenant	sourceTenant	String	sourceTenant
TOS Process	Source ProcessType	sourceProcess Type	String	source ProcessType
TOS Subprocess	SourceProcess Subtype	sourceProcess SubType	String	sourceProcess Subtype
TOS First Created D/T	SourceFirst CreatedDateTime	sourceFirst CreatedDT	Timestamp	sourceFirst CreatedDate Time
TOS Created D/T	SourceCreated Date Time	sourceCreated DateTime	Timestamp	sourceCreated DateTime
TOS Due D/T	SourceDue DateTime	sourceDueDateTime	Timestamp	sourceDue DateTime
Requested Agent	Requested Agent	requested Agent	String	requested Agent
Requested Skill	RequestedSkill	requested Skill	String	requested Skill
Requested Agent Group	Requested Agent Group	requested AgentGroup	String	requested AgentGroup
Requested Place Group	Requested Place Group	requested PlaceGroup	String	requested PlaceGroup

[+] CUSTOM

The Custom Attributes column does two things:

- Displays for selection any iWD Custom Attribute created using the **Configuring Custom Attributes** procedure.
- Lets you define a new Custom Attribute (a comma-separated key-value pair list) in your spreadsheet.

How do I create an iWD spreadsheet template to download?

These newly defined custom attributes will also appear in the Task Details GTL per the example below.

The screenshot illustrates the mapping of custom attributes from a spreadsheet to the Task Details GTL. The spreadsheet at the top shows a formula in cell B6: `captureID;workitem;firstAttr=value1 secondAttr=value2 thirdAttr=value3`. The Task Details GTL below shows various fields, with three custom attributes highlighted in red boxes: `firstAttr: value1`, `secondAttr: value2`, and `thirdAttr: value3`. Arrows indicate the mapping from the spreadsheet cells to these GTL fields.

A	B	C
1	Capture ID;"Media Type";"Custom Attributes"	
2	captureID;workitem;firstAttr=value1	secondAttr=value2 thirdAttr=value3

Task Details

Attributes

Status: ErrorHeld
Process:
Created D/T: Aug 17, 2015 2:11:41 PM GMT
Activation D/T:
Reprioritization D/T:
Last Assigned To:
Moved To Queue D/T: Aug 17, 2015 2:11:45 PM GMT

Media Type: workitem
Category:
Channel:
Business Value:
Queue: IWD_ErrorHeld_custom
Last Assigned D/T:
Business Calendar ID:

IWD_isContactServer: 1
RRequestedSkills:
RTargetObjectSelected: IWD_ErrorHeld_custom
RTargetTypeSelected: 14

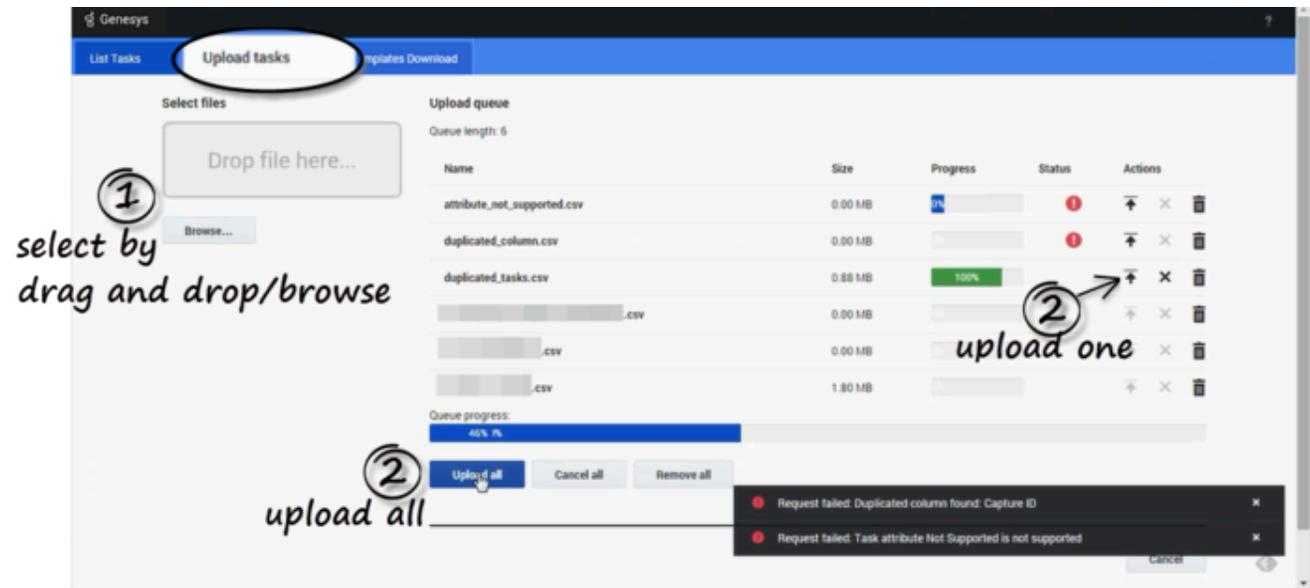
firstAttr: value1
secondAttr: value2
thirdAttr: value3

See also:

- [Upload tasks to iWD](#)
- [View status of upload jobs](#)
- [Overview](#)

How do I upload tasks to iWD?

Uploading tasks to iWD



1. **Either** drag and drop one or more spreadsheet files containing tasks **or** browse your filing system to make a selection.
2. To upload the file(s) to iWD/Interaction Server, click either **Upload All** or upload an individual spreadsheet by clicking on the up-arrow symbol next to it (in the **Action** column). The **Progress** column (showing the progress of the upload to iWD Web) shows either green (complete) or blue (in progress with percentage complete).

Notes

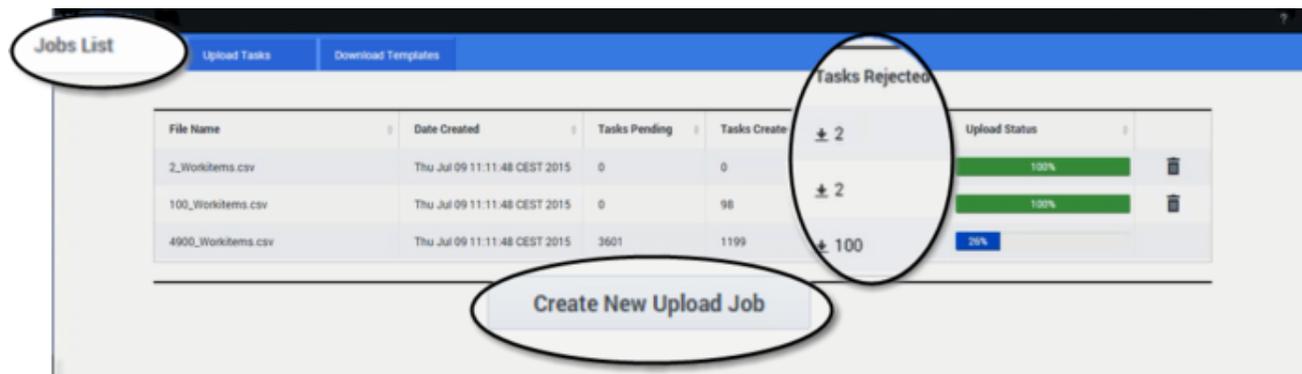
- Only .CSV, .XLS and .XLSX file formats are supported.
- View any errors by:
 - Viewing the error pop-ups at the bottom of the screen.
 - Hovering over the status icon.
 - Clicking on the hover help to display more detail where available.
- Go back to the **Jobs List** tab to download files containing errors for diagnosis and correction.

See also:

How do I upload tasks to iWD?

- **Download a spreadsheet template**
- **View status of upload jobs**
- **Overview**

How can I create and view iWD spreadsheet upload jobs?



- View the details and status of spreadsheet upload jobs, including those completed (green) and those in progress (blue).
- Use the **Create New Upload Job** button to switch to the **Upload Tasks** tab and create a new upload.
- Use the down arrow in the **Tasks Rejected** column to download a list of tasks that have been rejected from the selected upload. The file containing the rejected tasks will have the same extension as the upload file that contained the tasks. In the downloaded details, the **Submit Status** column will show the reason for the rejection.

	A	B	C	D	E	F	G	H	I	J
1	Capture ID;"Media Type";"Custom Attributes";"Submit Status"									
2	captureID;workitem;	firstAttr=value1	secondAttr=value2	thirdAttr=value3";	"Task cannot be created: Received error response: Duplicate interaction id"					

See also:

- [Upload tasks to iWD](#)
- [Download a spreadsheet template](#)
- [Overview](#)