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iWD Manager Help

[Global Task List](#)

Global Task List

The Global Task List (GTL) displays a list of tasks for the selected business context.

Summary

Task Management

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

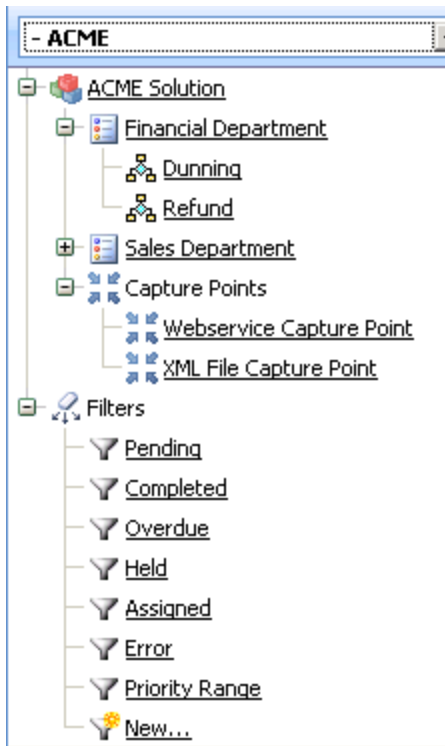
- Use Task Monitoring to view a list of tasks that are associated with different business contexts, as well as details and history for each task.
- Use Task Operation to override configured task-handling logic by performing a manual task operations on specific tasks such as Hold, Resume, Cancel, and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

Task Monitoring

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

- Solution
- Department
- Process
- Capture Point

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



GTL Display Actions

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

The screenshot shows the 'Global Task List' application window. The left pane shows the 'ACME' solution tree. The main pane displays a table of tasks with the following columns: ID, Capture ID, Status, Icon, Media Type, Process, Created D/T, Business Value, Priority, and Task Due D/T. The table contains five rows of data. Below the table are buttons for Refresh, Hold, Resume, Cancel, Modify, and Export to XML. The 'Task Details' pane on the right shows the details for the selected task (ID: 01R1AN2FPTXN000T).

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

Task Details

Attributes

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

Status: Queued

Tenant: ACME

Process: Order

Capture Point: Webservice Capture Point

Created D/T: May 18, 2012 1:21 PM

Distribution Point:

Activation D/T:

Task Due D/T: May 18, 2012 1:24 PM

Reprioritization D/T: May 21, 2012 4:15 PM

Display Actions

Attribute/Action	Description
Filter	Refines the GTL and displayed columns, based on the selected filter. For more information on filters, see Filters .
Advanced Filters	Custom attributes can be displayed, where configured, in Advanced Filters . Advanced filters let you further narrow down the tasks that are listed in the GTL. Up to three additional conditions can be added to a selected filter. All of the task's core and extended attributes are available. To add an advanced filter, select the attribute name from the drop-down list. Advanced filters cannot be saved and are retained only during an iWD Manager session.
Refresh	Refreshes the Global Task List.
Click task row	Displays task details. The selected row is marked.
Tooltips	Displays the whole value in a tooltip when you hover the mouse over the value in any column of the GTL.

Searching for a Task

You can search for a specific task by using:

- The **ID** Find field, if you know the task ID.
- The **Capture ID** Find field, if you know the task's capture ID.

Sorting the Display Columns

Click on a column name to sort the column into either ascending (odd number of clicks) or descending (even number of clicks). When you sort columns in this way, the sorting is applied to the whole view, not just to the first (or visible) page. The following exceptions apply:

- Some core fields like Tenant, Icon, Status and Queue-related—Not sortable.
- Process—Sorted not by name but by process_id.
- Department—Sorted not by name but by department_id.
- Capture Point—Sorted not by name but by capture_point_id.

Task Operations

Task operations provide the ability to override manually the configured task-handling business logic. Task operations are performed on the selected task. The task is selected if the first column of the task row in the list is checked. To select/deselect all tasks in the list, click the first column in the table header. If no task is checked, but task details are opened for some task, this task is also considered to be selected.

Hold

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

Resume

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

Cancel

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

Modify

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

ACME Solution > Financial Department

Filter: All Advanced ID: Find

ID	Status	Media Type	Channel	Process	Created D/T	Business Value	Priority	Task Due D/T
0230PQ2CDMDEG003	Completed	sms		Refund	2010.19.8 15:57	100	150	2010.19.8 16:03
<input checked="" type="checkbox"/> 0230PQ2CDMDEG004	Completed	workitem	MQ	Dunning	2010.19.8 15:59	80	130	2010.19.8 16:09
0230PQ2CDMDEG005	Completed	sms		Refund	2010.19.8 16:00	100	100	
0230PQ2CDMDEG006	Completed	sms		Refund	2010.19.8 16:00	100	100	

Refresh Hold Resume Cancel Modify Export to XML Configuration

Modify 1 Task(s)

Core Attributes

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

Extended Attributes

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

Save Save & Restart Cancel

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

Important

If the **Priority** attribute is modified through the GTL while the task (interaction) is in the **Target** block of the Distribution strategy waiting to be routed to an agent, the internal queue in Universal Routing Server (URS) will take this new priority into account.

Save and Restart

Save & Restart

A task is assigned to a Process, but that Process has a start date that is in the future. In this scenario, the task is placed into the iWD_Rejected queue (IRD) or the iwd_bp_comp.Main.iWD_Rejected queue (Composer). In order to re-initiate processing of this task once the start date of the Process has been reached, you must perform a **Save & Restart** in the GTL. Processing of the task will not re-initiate automatically.

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

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

Export to XML

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

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

Important

Please remember that all attribute data (name, for example) will be in iWD format. An export file cannot be used directly for input to an Interaction Server XML Capture Point input unless it has some transformation mechanism enabled.

Task Details-Attributes

Display

When you select a task from the GTL, its attributes are displayed.

ACME Solution > ACME Solution

Filter: All Advanced ID: Find Capture ID: Find

ID	Capture ID	Status	Icon	Media Type	Process	Created D/T	Business Value	Priority	Task Due D/T
01R0X82FPTX28002	444	Queued		workitem	Refund	May 18, 2012 2:16 PM	100	2850	May 18, 2012 2:22 PM
01R0X82FPTX28001	458	Canceled		workitem	Dunning	May 18, 2012 2:16 PM	80	2830	May 18, 2012 2:26 PM

Refresh Hold Resume Cancel Modify Export to XML

Task Details

Attributes History

ID: 01R0X82FPTX28001 Status: Canceled

Media Type: workitem Tenant: ACME

Department: Financial Department Process: Dunning

Category: Capture Point: XML File Capture Point

Capture ID: 458 Created D/T: May 18, 2012 2:16 PM

Channel: Internet Distribution Point:

Age: 3d 1h 57m 35s Activation D/T:

Business Value: 80 Task Due D/T: May 18, 2012 2:26 PM

Priority: 2830 Reprioritization D/T: May 21, 2012 4:13 PM

Queue: IWD_Canceled Queue Type: InteractionQueue

Queue Target: Assigned To:

Assigned D/T: May 21, 2012 4:13 PM Completed D/T:

Expiration D/T: Jun 18, 2012 2:16 PM Moved To Queue D/T: May 21, 2012 4:13 PM

Attributes are broken down into three sections:

- Top—Core task attributes.
- Middle—Extended task attributes. These are displayed only when the task has extended attributes.
- Bottom—Custom task attributes. (These attributes can be filtered by an administrator via the **GAX -> Configuration -> Intelligent Workload Distribution -> Business Structure -> <Tenant> -> <Solution Name> -> Interaction Server Settings -> Attribute Filter Include/Attribute Filter Exclude** menu options.)

User-friendly, on-screen labels for custom attributes must be configured by administrators.

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

You can also hover your mouse over a task attribute and view the whole value of the task attribute as a tooltip (length of the text permitting).

If **(Missing)** is displayed, this means the field is not empty but the value kept there is not recognized by GTL. It may mean that your system is misconfigured.

For more information about configuring and working with Task Attributes, click [here](#) (new document).

Task Details-History

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

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

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

Related Links

- [Filters](#)
 - [Media Icons](#)
 - [Import/Export](#)
 - [Custom Interaction Properties](#)
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