GENESYS™

iWD Manager Help

intelligent Workload Distribution 8.5.1

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iWD Manager Help

iWD Manager allows you to monitor and manage tasks in the iWD Global Task List (GTL), and perform some administration.

Task Monitoring & Management

Monitor the current list of GTL tasks, and override configured task-handling logic by performing manual task operations.

Global Task List

Filters

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Manage media icons and update customer interaction properties.

Manage Media Icons

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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

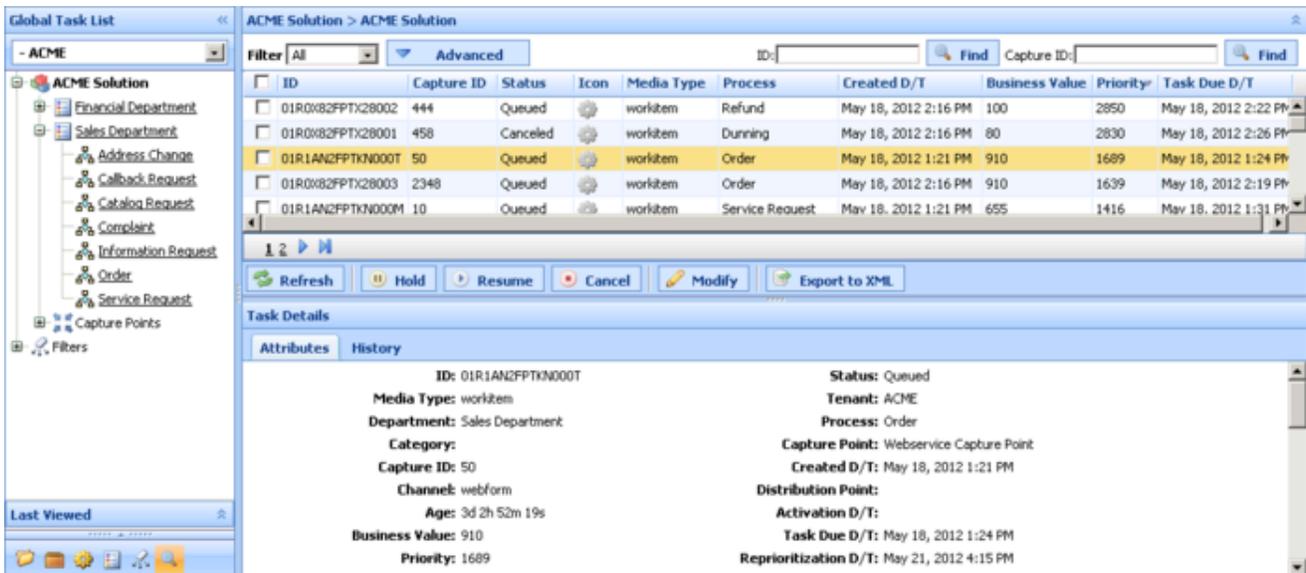Task Monitoring allows you to view a current list of tasks for a number of business contexts:

- 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.
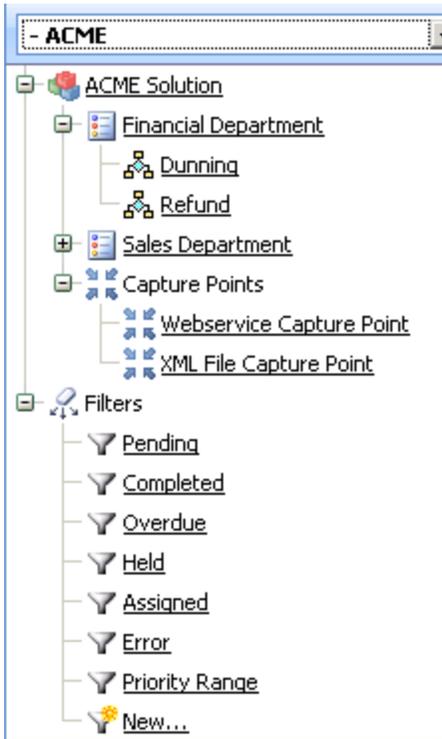
GTL Display Actions

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

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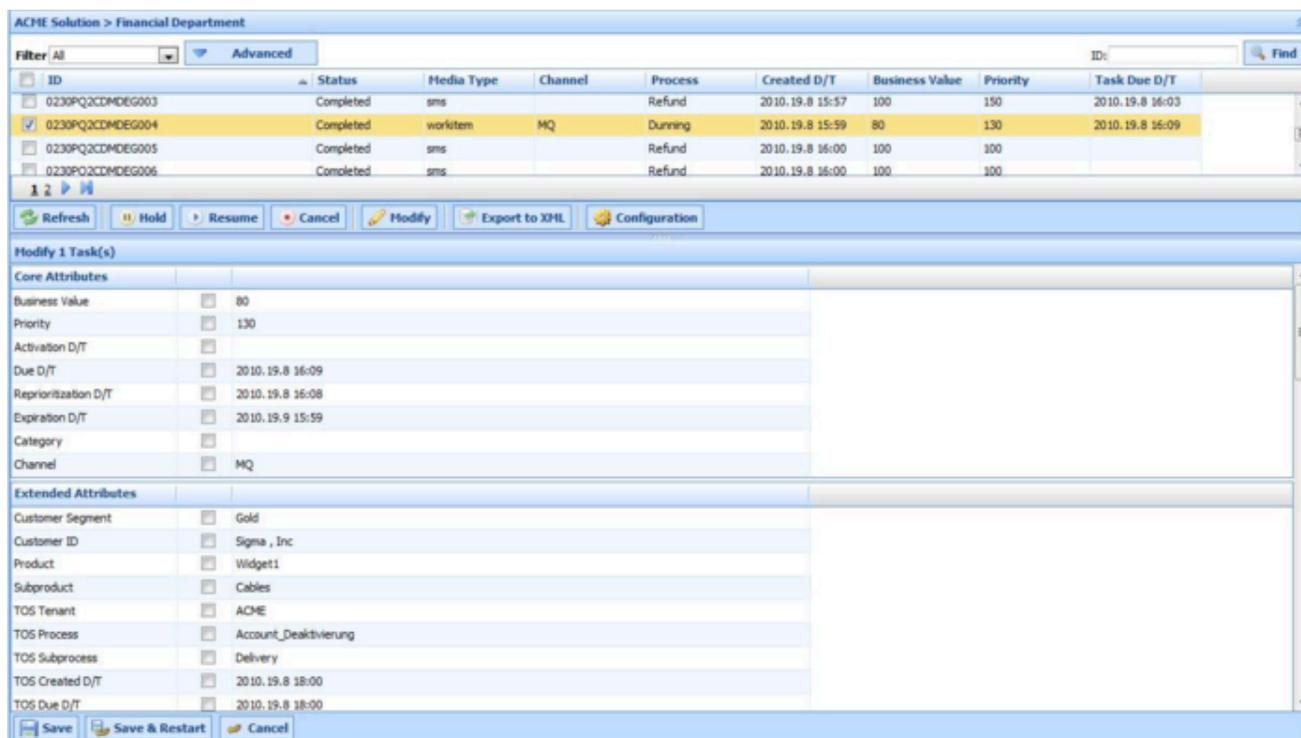
An attribute will be updated only if the check box that is next to it is checked; it will be checked automatically if a value of the corresponding field has changed. If the task is also restarted, its status is set to New, and it is classified and prioritized again in the same way as a new task.

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.

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.

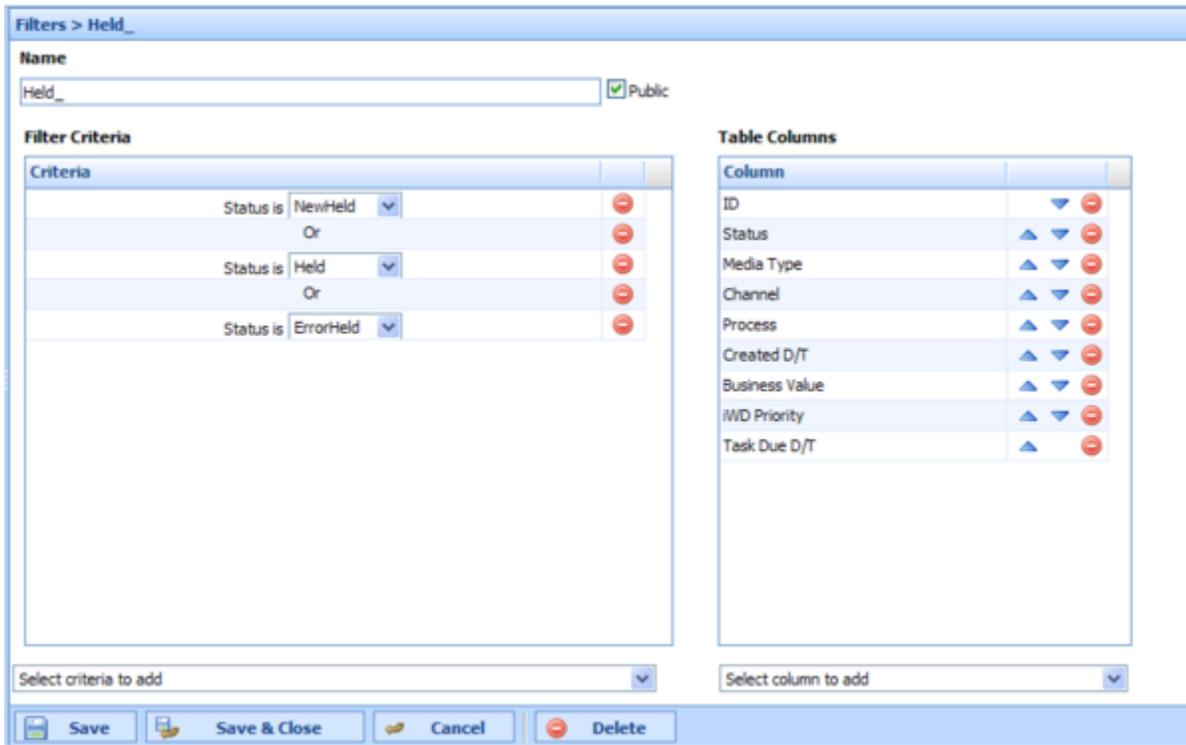| Attribute/Action	Event	Description
Date/Time		The date/time when the event occurred.
Actor		Shows who triggered the event. This is empty for iWD system-triggered events.
Event Code	NEW	Task has just been created.
	CLASSIFY_START	Task classification has started.
	CLASSIFY	Task classification has finished.
	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**

Filters

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

Preconfigured Filters

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

Filter Attributes

Attribute/Action	Description
Name	The name of the filter.

Attribute/Action	Description
Public	Whether the filter will be available to all users (checked) or only the current user (unchecked).
Filter Criteria	Tasks that do not match the defined criteria will be excluded from the GTL when the filter is selected. New criteria conditions can be added by selecting them from the **Select criteria to add** drop-down list. Some criteria conditions are parameterized; for such conditions, parameters can be configured directly in a criteria table (such as, status for `Status is ...` criteria). Custom attributes can be used in many of the filter criteria, with proper configuration. Custom Attributes for tasks are configured in the iWD GAX Plugin component. See the **Task Attributes** tab of the Data Mart section of iWD GAX Plugin Help.
Table Columns	The GTL will display these columns when the filter is selected. Columns can be added, removed, and reordered. A user can select from a list that includes all iWD core and extended attributes, by default. With proper configuration, custom attributes can also be selected.
Save, Save & Close, Cancel, Delete	Standard iWD Manager functions.

Creating Custom Filters

Creating a Custom Filter

1. Click **Filter > New** in the left navigation pane.

2. Check the **Public** checkbox to make the new filter available to all users. If this box is not checked, only the current user can view the new filter.

3. From the **Select criteria to add** drop-down menu at the bottom left, select filter criteria for the new filter. Use the red delete button displayed to the right of the selected criterion to delete it if required.

4. From the **Select column to add** drop-down menu at the bottom center, add any new table columns for displaying the filter output. The current selection of table columns appears to the right of the screen. Use the up/down arrows to sort the display of the table columns. Use the red delete button to delete any columns as required.

5. Click **Save** or **Save and Close**. The newly created filter is now available for selection in the main Global Task List window.

Understanding Timezones in Filters

Timezones in Filters

Dates in advanced filters are interpreted as half-open time intervals, starting at midnight of the given day and ending at midnight of the next day. Midnight means the time 00:00:00 in the current user's timezone. If the user's timezone is not set, the current solution's time zone is used. If this is also missing, Universal Coordinated Time (UTC) is assumed. Daylight saving rules are also taken into consideration.

In the case of persistent filters, the timezone of the user who defines the filter is used to calculate the time interval. If there is no timezone configured, UTC is assumed (filters are independent from Solutions).

Example

The user's time zone is Europe/Warsaw (GMT+1)(+DST). The user sets a filter on **Expiration Date** to 2014-10-26. GTL will display tasks that have an **Expiration Date Time** between 2014-10-26 00:00:00 CEST (inclusive) and 2014-10-27 00:00:00 CET (exclusive). In translation to the UTC timezone, these will become 2014-10-25 22:00:00 and 2014-10-26 23:00:00. Because of daylight saving the interval is 25 hours long.

Related Links

- **Global Task List**
- **Media Icons**
- **Import/Export**
- **Custom Interaction Properties**

Media Icons

The **Media Icons** view provides a way to map graphical icons to media types to display in the GTL. iWD comes with some pre-loaded icons, but additional icons can be uploaded and mapped to existing media types, or new media types. Icons must be 16x16, but can be in any of the following file formats:

- GIF
- JPG
- BMP
- PNG

The following properties and actions are available in the **Media Icons** panel:

Icon	Description
Media Type	The media type to which the icon will be mapped. This list of media types is retrieved dynamically from Genesys Configuration Server. Media types are a type of **Business Attribute** in Configuration Server. Genesys provides out-of-the-box media types but new custom media types can be added.
Icon	The graphical 16x16 icon that will be displayed in the GTL when a task is of the media type to which the icon is mapped.
File Name	The file name of the icon.
New Icon Mapping	Provides a way for you to upload a new icon from the file system.
Browse	Opens a **File Upload** dialog window to enable you to browse the file system to select an icon.
Upload	Uploads the icon selected via the **Browse** action.
Save/Save and Close/Cancel	Standard iWD Manager functions.

Related Links

- **Global Task List**
- **Filters**
- **Import/Export**
- **Custom Interaction Properties**

Import and Export

> ### Important
> In release 8.5, almost all the configuration elements have moved from iWD Manager into the iWD GAX Plugin component or to another part of Genesys Administrator Extension.

The following properties and actions are available in the **Import/Export** panel:

- **Import Configuration**—Allows you to import the iWD Media Icons configuration from an XML file. In the **Import Configuration** pane, click **Choose File** to browse to the file you require on your local drive, select it and and click **Import**.

- **Export Media Icons**—Allows you to export the tenant's media icons to an XML file. In the **Export Configuration** pane, check the **Export Media Icons** checkbox and click **Export**.

Related Links

- **Global Task List**
- **Filters**
- **Media Icons**
- **Custom Interaction Properties**

Configuring Interaction Custom Properties

The **Configure Interaction Custom Properties** feature supports iWD by:

- Adding the necessary columns to tables in the Interaction Server and Interaction Server Event Log databases to support iWD.
- Creating new iWD-related **Interaction Custom Properties**, which are a type of **Business Attribute**, in the Genesys configuration database.
- Creating some options for the Interaction Server Event Log Database Access Point that are necessary to support iWD.
- Adding iWD_Completed (IRD) or iwd_bp_comp.Main.iWD_Completed (Composer) or a customized business process queue name for completed tasks to the Interaction Server configuration.

If any of these updates was not previously done, clicking on the **Configure Ixn Custom Properties** node will display an on-screen message, informing you of the missing attributes or outdated database versions.

At this point, click on the **Configure Ixn Custom Properties** button to execute the configuration. A message will be displayed in the **Messages** pane when the configuration has completed. A restart of Interaction Server is required if any configuration changes were made.

Related Links

- **Global Task List**
- **Filters**
- **Import/Export**
- **Media Icons**