GENESYS™

iWD Web Help

intelligent Workload Distribution 9.0.0

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iWD Web Help

iWD Web enables the upload to IWD, with minimal configuration, of spreadsheets (XLS, XLSX and CSV formats) containing work items from third-party source systems.

With automated upload, source systems export tasks/work items to a safe location/folder that iWD Web can access. iWD Web checks for the presence of a new file in this location, checks the file format, then imports the individual tasks to iWD / Interaction Server for insertion into the Global Task List.

With manual upload, users can create spreadsheets using downloadable templates, populate them with work items and manually upload them to iWD / Interaction Server for insertion into the Global Task List.

Users can monitor upload progress and completion of both automated and manual uploads.

You can find information about how to configure iWD Web in the iWD 9.0 Deployment Guide.
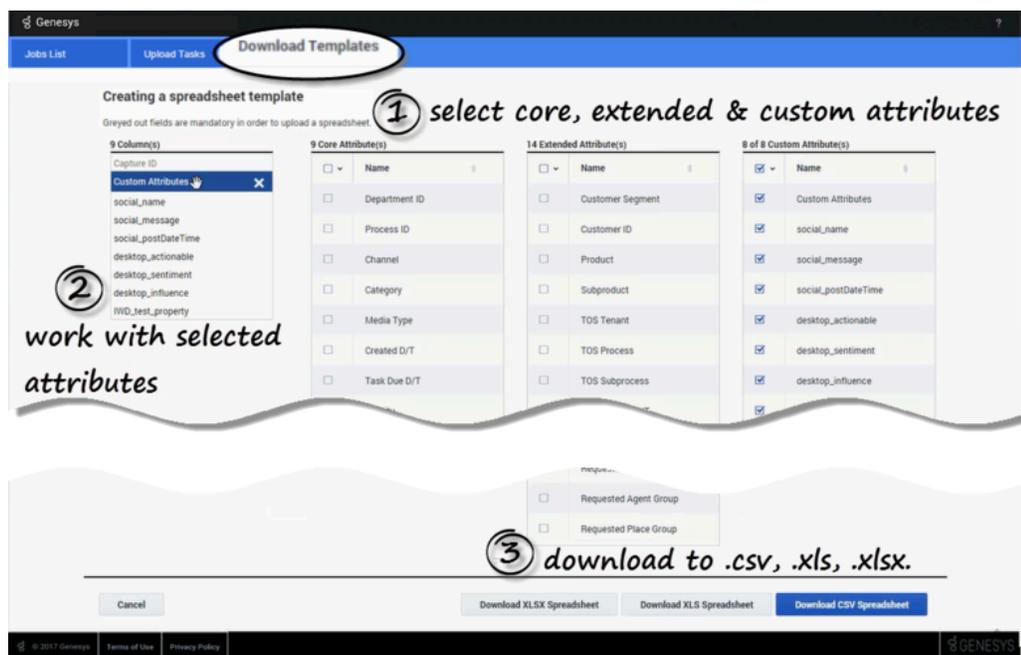
What you can do with iWD Web
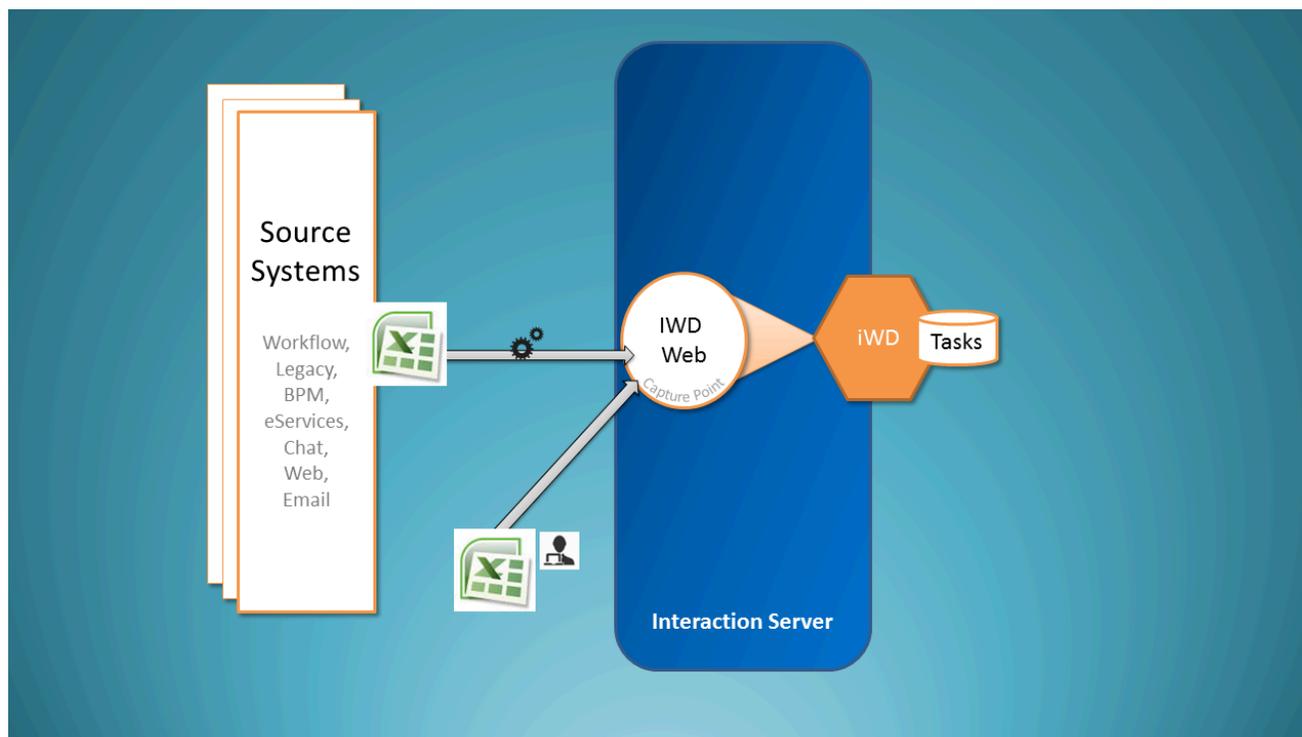
This is iWD Web Help. Here you can get help about:

- How to download a spreadsheet template.

- How to upload tasks manually.

- How to view and manage automated and manual 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 delete them 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`.

Note: 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.

Link to video

Watch this short demo.

Task attributes details

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.

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

See also:

- **Upload tasks to iWD**
- **View status of upload jobs**
- **Overview**

How do I upload tasks to iWD?

Uploading tasks to iWD
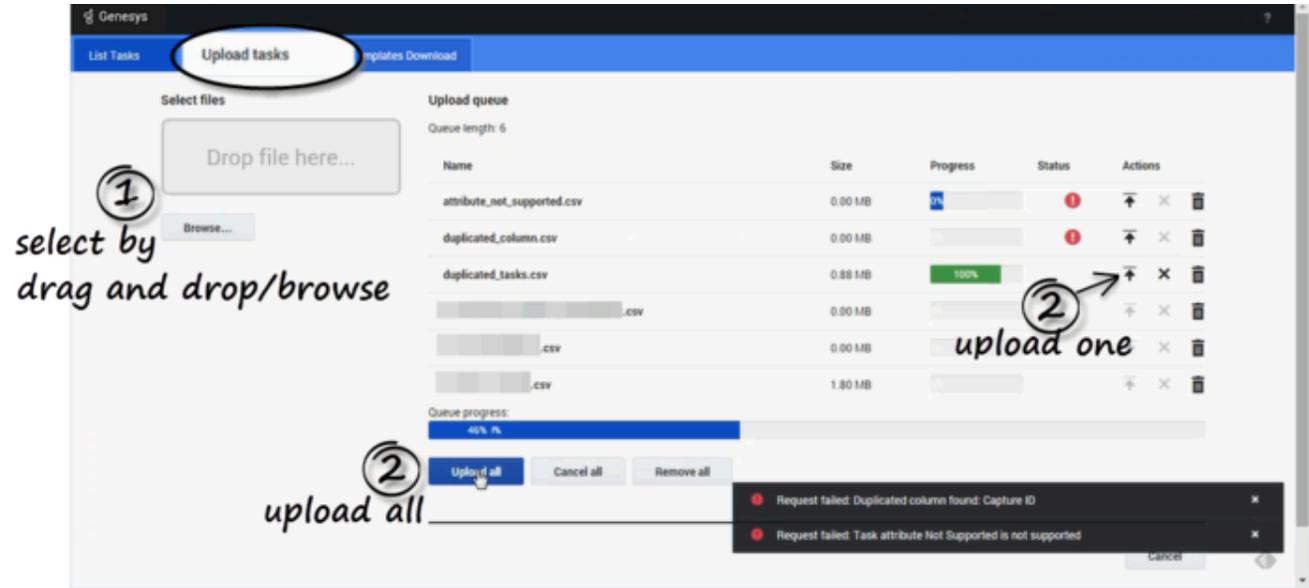
1. **Either** drag and drop one or more spreadsheet files containing tasks **or** browse your filing system to make a selection.

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).

Link to video

Watch this short demo.

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.
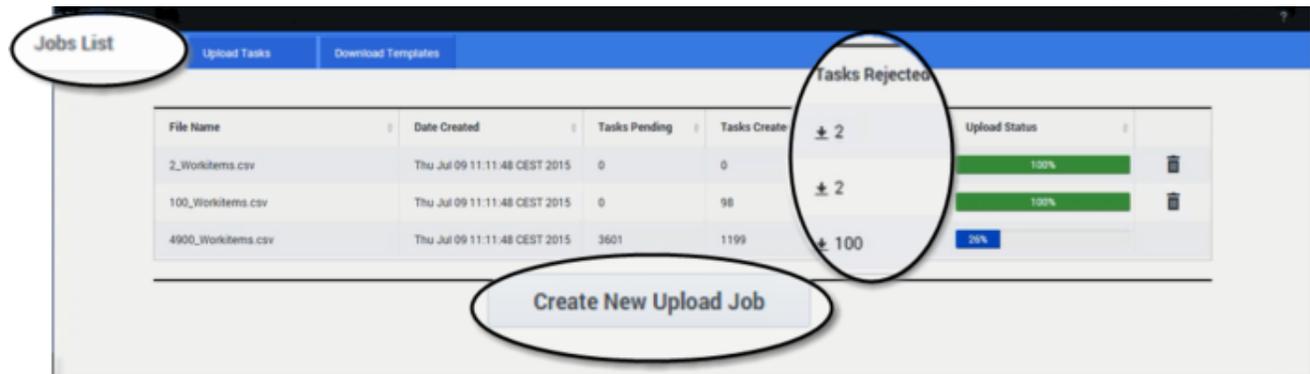 - Hovering over the status icon.

- 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:

- **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 (both those that were initiated manually, and those that are automatically uploaded). Completed uploads display in green. Those still in progress display in 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.

See also:

- **Download a spreadsheet template**
- **Upload tasks to iWD**
- **Overview**