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Workforce Management Administrator's Guide

Manually Creating and Configuring WFM Application Objects

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Manually Creating and Configuring WFM Application Objects

This topic contains information and procedures that will help you to use Configuration Manager and other tools to manually create Workforce Management (WFM) Application objects and perform other configurations manually. It contains the following sections:

- [Manually Create the Application Objects](#)
- [WFM Daemon Setup](#)
- [Manually Create the WFM Solution Object](#)
- [Manually Change Configuration Host and Port](#)
- [Procedures](#)

Manually Create the Application Objects

If you are familiar with Configuration Manager, you might choose to create and configure the component Application objects manually, rather than using the wizards. See [Procedure: Creating Application Objects Manually](#).

WFM Daemon Setup

To successfully run WFM Daemon, you must set the correct SMTP server host and port. Depending on your configuration, you might also need to set the user name and password. For information about how to set these options, see the “SMTP Section” of [Options Tab for WFM Daemon](#).

To support automatic report creation, perform these configurations using Configuration Manager:

- In the WFM Web Application, set the Reports section variable ServerURL. See [Procedure: Installing WFM Web as Report Server](#).
- In the WFM Web Application, set the Reports section variable PathToAutoGeneratedReports to the network path for storing generated reports. See [Options Tab for WFM Web](#).
- In the WFM Daemon Application, add a connection to the WFM Web Application that you installed as the report server in [Procedure: Installing WFM Web as Report Server](#).

For notifications to work successfully:

- Each agent and supervisor must have the proper e-mail set. As described in the [Workforce Management 8.1 Configuration Utility Help](#), e-mail addresses are initially defined in Configuration Manager as part of the Person object. Once e-mail addresses exist in the Configuration Database, you have the option of importing them into the WFM Database.

- The supplied SMTP server must be configured to accept e-mails for those addresses. Before anything can be sent, you must first configure notifications in the WFM Web for Supervisors, Configuration module, as described in [Workforce Management 8.1 Web for Supervisor Help](#).
- A Supervisor's ability to receive notifications depends on their security settings (see [User Security](#)). Supervisors must be granted rights to receive notifications for each notification type and have access to the agent teams for which they want to receive notifications, as described in [Workforce Management 8.1 Configuration Utility Help](#).

[Back to Top](#)

Manually Create the WFM Solution Object

If you are using Management Layer, you must create the WFM Solution object and add the necessary components. If you have not yet imported the solution template and created the solution Application object, see [Procedure: Importing WFM Solution Template](#).

[Back to Top](#)

Manually Change Configuration Host and Port

When you run the Configuration Wizards, you enter the Configuration Server host and port information for the WFM servers. However, you might need to change this information after installing WFM.

Important

Editing a `startServer.bat` file is effective only if the server is started by using the `.bat` file. If you start the server manually from the control panel, or if it is started automatically as a Windows service, you must unregister the server and then re-register it. If you start the server using the Solution Control Interface (SCI), you must change the settings for the server in the server's Application object, by using Configuration Manager.

To update or change this information manually by completing one of two methods:

- Edit the `startServer.bat` file for each affected server.
- Unregister the servers and then reregister them, by using the updated host, port, and application name information.

For procedures that describe both methods, see [Procedure: Editing the startServer.bat files](#) and [Procedure: Using Server Registration to change the host and port information](#).

The `startServer.bat` files for each server are located in the same directory as the executable for that server.

[Back to Top](#)

Procedures

Procedure: Creating Application objects manually

Purpose: To create WFM Application objects manually (not using the Configuration Wizards).

Start of Procedure

1. In Configuration Manager, open the Environment > Applications folder.
2. Right-click in the folder and select New Application from the shortcut menu that appears.
3. Browse to and select the appropriate application template from those you previously imported. If necessary, see [Import the WFM Templates](#) for instructions.
4. Enter the appropriate information in each tab of the Application object. If you need guidance, check the description for that component in [Install and Run the Configuration Wizards](#). The information on most of these tabs is familiar to regular users of Configuration Manager. Ensure the settings are correct on the Connections tab of each Application object. For the complete set of required connections, see [Table 1](#).

End of Procedure

Next Steps:

- Manually configure the Options tab settings. For a list of options with default settings and descriptions, see [WFM Configuration Options](#).

Procedure: Creating and configure a Solution object

Purpose: To create and configure the WFM Solution object.

Start of Procedure

1. Double-click the Workforce Management solution to open its Properties dialog box.
2. On the Components tab, add the servers that Workforce Management needs to run (see [Table 3](#) on page 102), where: The Components Definition tab displays the preset component types with which the solution connects. The actual connections are configured on the Components tab, but you can use the Components Definition tab as a guide to the correct settings.
 - Application is the name of the application that the Workforce Management solution runs.
 - Optional is the requirement status. False means that the application must run successfully for WFM to run. True means that the application is optional for WFM to run.

- Startup Priority is the order in which to start the servers.

Warning

You cannot revise Startup Priority after you have configured it.

3. Click OK.

Table 1: Definitions Tab Settings for the Workforce Management Solution Components

Application	Optional	Startup Priority
Message Server(s)	True	1
WFM Server	False	2
WFM Data Aggregator	False	3
WFM Builder	False	3
WFM Daemon	True	3

End of Procedure

Procedure: Editing the startServer.bat files

Purpose: To edit the WFM startServer . bat files.

Start of Procedure

1. To edit the WFM startServer . bat file, stop the WFM server.
2. Open the startServer.bat file in a text editor, such as WordPad.
3. Change the host and port information.
4. Save the edited file.
5. Restart the server.

End of Procedure

Procedure: Using Server Registration to change the host and port information

Purpose: To change the host and port for a server.

Summary: You can also change the host and port information for the servers by unregistering them as services and then reregistering them using the new host and port.

Start of Procedure

1. Execute the following command from the command line to unregister the installed service:

```
<server .exe filename> -remove
```

For example, WFMServer.exe -remove

2. Register the service with new host and port information:

```
<server .exe filename> -install -host "<hostname>" -port "<portnumber>" -app  
<applicationname>
```

For example, WFMServer.exe -install -host "Siamese" -port 4000 -app WFMServer_76

End of Procedure

[Back to Top](#)