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Workforce Management Administrator's Guide

WFM Configuration Wizards

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WFM Configuration Wizards

The Workforce Management (WFM) Configuration Wizards guide you through the process of creating the Application objects for the WFM components. It is run from the Genesys Wizard Manager. This topic includes the following sections and contains procedures that will help you to install and run the wizards, and create the WFM Application objects:

- [Installing and Running the Configuration Wizards](#)
- [WFM Server Wizard](#)
- [WFM Data Aggregator Wizard](#)
- [WFM Daemon Wizard](#)
- [WFM Builder Wizard](#)
- [WFM Client Application Wizard](#)
- [WFM Web Wizard](#)
- [Procedures](#)

You can also create and configure the component Application objects manually. For instructions, see [Manually Create and Configure the Applications](#).

Important

You must manually configure the Options tab. For a list of the options on the Options tab, with default settings and descriptions, see [Configuring the Options Tabs](#).

Installing and Running the Configuration Wizards

You must install the wizards before you can run them. After you install them, start the Configuration Wizards and use them to create WFM Application objects. To install and start the Configuration Wizards, see [Installing WFM Configuration Wizards](#) and [Starting the Configuration Wizards](#).

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WFM Server Wizard

Clicking the Add button opens the Browse for Application (WFM Server) window, which shows the contents of your Configuration Manager Applications folder.

You can also configure multiple WFM Server Applications for your multi-site environment and if

required, add connections to WFM Server. To install one or many WFM Server instances and add connections, see [Creating a Server Application Object](#) and [Configuring Multiple Server Application Objects](#).

WFM Data Aggregator Wizard

The WFM Solution Wizard now looks for a Data Aggregator Application object. If you have already created any WFM Data Aggregator Application objects, they are listed in this window. At this point you can:

- Select an already-created Application object and click Next to proceed to the next wizard.
- Select an already-created Application object and then click Properties to edit it before proceeding.
- Click Add to create a new Application object.

Clicking Add in the Configuration Wizard opens the Browse for Application (WFM Data Aggregator) window, which shows the contents of your Configuration Manager Applications folder. To install Data Aggregator, see [Creating a Data Aggregator Application Object](#).

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WFM Daemon Wizard

Use the WFM Daemon Wizard to create an WFM Daemon Application object. See [Creating a Daemon Application Object](#).

WFM Builder Wizard

Use the WFM Builder Wizard to create an WFM Builder Application object. See [Creating a Builder Application Object](#).

WFM Client Application Wizard

The Configuration Utility and the Database Utility use the same Application object. To create it, start at the WFM Solution Wizard WFM Client window. See [Creating a Configuration Utility Application Object](#).

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WFM Web Wizard

To create the WFM Web Client Application object, start at the WFM Solution Wizard WFM Web window, which appears after the WFM Application Wizard closes. See [Creating a Web Application Object](#).

Procedures

Click the red arrow below to see a list of procedures relevant to installing WFM components, by using the wizards.

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| - | Installing WFM Configuration Wizards =

Purpose: To install the wizards.

Start of Procedure

1. On the Workforce Management release disk, open the root directory or navigate to the configuration_wizard directory.
2. Double-click Setup.exe.
The Welcome window opens.

Important

If you have already installed the Wizards, the window offers a Remove option.

3. Click Next.
The Choose Solution Destination window opens, displaying a default directory, for example: C:\Program Files\Common Files\GCTI\CFG Wizards 8.5.
4. Click Default to accept the default directory, or click Browse to select a different directory.
5. Click Next.
The Ready to Install window opens.
6. Click Install to start the installation process.
A progress bar appears as the Wizard files are copied.
7. Click Finish to exit the setup after all files have been copied.

End of Procedure

| - | Starting the Configuration Wizards =

Purpose: To start the WFM Configuration Wizards

Start of Procedure

1. Select Start > Programs > Genesys Solutions > Workforce Management > Workforce Management Configuration Wizards > Start Wizard Manager and click the log into the Configuration Layer link.
2. When the LogIn window appears, enter the login information for your Configuration Server.
3. From the list of solutions at the left side of the main Genesys Wizard Manager window, click Workforce Management.
4. Click the Deploy Workforce Management link that appears in the right-hand pane of the Set Up Your Solutions window.
The Workforce Management Wizard Welcome window opens.

Important

If you already have a WFM solution set up, it appears instead of the Deploy Workforce Management link. You can edit your existing solution by clicking Properties, or delete it and configure a new one.

5. Click Next.
The General window opens.
6. Enter a name for your WFM solution and select a Solution Control Server.
This is the Solution Control Server that Management Layer uses to start, stop, and monitor your WFM solution.
7. Click Next.

End of Procedure


Next Steps:

- If you have already created any WFM Server Application objects, they are listed in this window. At this point you can:
 - Select an already-created Application object and click Next to proceed to the next wizard.
 - Select an already-created Application object and then click Properties to edit it before proceeding.
 - Click Add to create a new Application object.

|-| Creating a Server Application Object=

Purpose: To create a WFM Server Application object.

Start of Procedure

1. To create your WFM Server Application object, click the New Application icon.
It is the left-most icon at the top of the window and looks like this: 

The WFM Server Wizard Welcome window opens.

2. Click Next. The WFM Server Name window opens.
3. Enter a name for your WFM Server Application object, and then click Next. The Server Info window opens.
4. Select or modify the host name and port number of the computer where you want to install this application, and then click Next.

Important

This is the information for the computer where WFM Server will run, not the host and port for the Configuration Server computer.

5. In the Installation Package window, specify the Source and Destination directories for copying the Installation Package, and then click Next.
6. On the Installation Ready window, click Next.
7. On the Connections window, select from the drop-down list or browse to the DAP Application object you created previously.
See [Creating a Database Access Point](#).

Important

The Connections window also asks for the WFM Builder Application option. This procedure assumes that you have not yet created this Application object. If you already have created, select the object here. If you do not have a WFM Builder Application object, leave the Connections field empty for now. You will add connections to this Application object later. See [Adding Connections in the WFM Server Application Object](#) for instructions.

8. Click Next to open the Log Configuration window.
You can click Run Log Wizard to customize your log settings or click Next to accept the default log settings. You can change these settings at any point by using the Wizard to edit your WFM Server Application object or by editing the Log section on the Options tab of the WFM Server Application object. Procedures that describe how to edit the Options tab settings are found in [WFM Configuration Options](#).
9. To close the WFM Server Wizard, click Finish.
The Application object appears in your Configuration Manager Applications folder.
10. Select your new WFM Server Application object and click OK.
The new Application object now appears in the Solution Components list.
11. Click Next to continue.

End of Procedure

Next Steps:

- (Optional) If you are planning to schedule for multiple sites served by multiple WFM Servers, you must configure the correct connections. See [Configuring multiple WFM Server Application objects](#).

|–| Configuring Multiple Server Application Objects=

Purpose: To configure multiple WFM Server Applications for multi-site environments.

Start of Procedure

1. Configure a WFM Server Application object for each WFM Server and install the WFM Servers as instructed in this section and in [Installing WFM Server](#).
Decide which of the WFM Servers will act as the main WFM Server and which are to be configured as subordinate.
2. Open the main WFM Server Application object's Connections tab and add all the subordinate WFM Servers.
3. When your entire installation is complete, open the WFM Configuration Utility and specify which WFM Server is associated with each site using the Site Properties window.
4. Start all the WFM Servers.
Assuming that the objects in the WFM Configuration Utility are fully configured, you should be able to use WFM Web for Supervisors to create schedules for activities on all sites in any WFM Server Application object.

End of Procedure

|–| Adding Connections in the Server Application Object=

Purpose: To add a connection to WFM Builder in the WFM Server Application object.

Prerequisites: You have created a WFM Builder Application object.

Start of Procedure

1. Select your WFM Server Application object from the Solution Components list and then click Properties.
The Properties dialog box of the WFM Server Application object opens.
2. Click the Connections tab.
3. Enter or browse to your WFM Builder Application object, and then click OK.
The Application objects are now configured for the four solution components in the Solution Components list.
4. To begin client Application object configuration, click Next.

End of Procedure


Next Steps:

- You must now create Application objects for the client components:
 - WFM Configuration Utility/WFM Database Utility—See [WFM Client Application Wizard](#).
 - WFM Web—See [WFM Web Wizard](#).

| Creating a Data Aggregator Application Object=

Purpose: To create a WFM Data Aggregator Application object

Start of Procedure

1. To create your WFM Data Aggregator Application object, click the New Application icon.
It is the left-most icon at the top of the window and looks like this: 
The WFM Data Aggregator Wizard Welcome window opens.
2. Click Next. The WFM Data Aggregator Name window opens.
3. Enter a name for your WFM Data Aggregator Application object, and then click Next.
The Server Info window opens.
4. Select or modify the host name and port number of the computer where you want to install this application, and then click Next.

Important

This is the information for the computer where WFM Data Aggregator will run, not the host and port for the Configuration Server computer.

5. (Optional) Select a backup WFM Data Aggregator if you are planning to use a redundant architecture such as Hot-Standby or Warm-Standby.
If you have not yet created another Data Aggregator Application object, skip this step. You can add a connection to the backup WFM Data Aggregator after you create its Application object. To do so, edit the Application object from the Solution Components list in the WFM Solution Wizard.
6. Click Next to continue.
7. In the Installation Package window, specify the Source and Destination directories for copying the Installation Package, and then click Next.
8. On the Installation Ready window, click Next.
9. On the Connections window, browse to or select from the drop-down list:
 - i. Your WFM Server Application object
 - ii. The DAP Application object you created previously (see [Creating a Database Access Point](#))
 - iii. Your Stat Server Application object.
10. Click Add WFM Statistics to have the Wizard add preconfigured WFM-specific statistics to your Stat Server.

Important

See [Configuring Stat Server Statistics](#) for a list of all the preconfigured statistics that are added by the Wizard if you select this option and explanations of how to configure these statistics manually, if necessary.


11. Click Next to open the Log Configuration window.
You can click Run Log Wizard to customize your log settings or click Next to accept the default log settings. You can change these settings at any point by using the Wizard to edit your WFM Data Aggregator Application object or by editing the Log section on the Options tab of the WFM Data Aggregator Application object. Procedures that describe how to edit the Options tab settings are found in [WFM Configuration Options](#).
12. To close the WFM Data Aggregator Wizard, click Finish.
The Application object appears in the Browse for Application (WFM Builder) window.
13. Select your new WFM Data Aggregator Application object and click OK.
The new Application object now appears in the Solution Components list.
14. Click Next. The Solution Components window opens.

End of Procedure

| Creating a Daemon Application Object=

Purpose: To create a WFM Daemon Application object:

Start of Procedure

1. Click Add.
The Component Types window appears. It lists the components for which you can create an Application object.
2. Select the WFM Daemon radio button and click OK.
3. Click the New Application icon () , which is the left-most icon in the row at the top of the Browse for Application (WFM Daemon) window.
The WFM Daemon Wizard Welcome window opens.
4. Click Next.
The WFM Daemon Name window opens.
5. Enter a name for your WFM Daemon Application object, and then click Next.
The Server Info window opens.
6. Select or modify the host name and port number for the computer where you want this application installed.

Important

This is the information for the computer where WFM Daemon will run, not the host and port for the Configuration Server computer.

7. On the Installation Package window, select the Source and Destination directories for the Installation Package, and then click Next.
8. In the Installation Ready page, click Next.
9. In the Connections window, browse to or select your WFM Server Application object from the drop-down list, and then click Next.

10. In the Log Configuration window, click Run Log Wizard to customize your log settings, or click Next to accept the default log settings. You can change these settings at any point by using the Wizard to edit your WFM Daemon Application object, or by editing the Log section on the Options tab of the WFM Daemon Application object. Procedures for editing Options tab settings are described in [WFM Configuration Options](#).
11. To close the WFM Daemon Wizard, click Finish.
The Application object appears in the Browse for Application (WFM Daemon) window.
12. Select your new WFM Daemon Application object and click OK.
The new Application object appears in the Solution Components list.

The WFM Solution Wizard displays the following message:
The following components will be part of your solution. If you need to set up client applications for your solution, click Next. To complete this wizard, click Finish.

Important


For information about setting up WFM Daemon, see [Setting Up WFM Daemon](#).

End of Procedure

| Creating a Builder Application Object=

Purpose: To create a WFM Builder Application object.

Start of Procedure

1. Click Add.
The Component Types window appears. It lists components for which you can create an Application object.
2. Select the WFM Builder radio button and then click OK.
3. Click the New Application icon () , which is the left-most icon in the row at the top of the Browse for Application (WFM Builder) window.
The WFM Builder Wizard opens.
4. Click Next.
The WFM Builder Name window opens.
5. Enter a name for your WFM Builder Application object, and then click Next.
The Server Info window opens.
6. Select or modify the host name and port number for the computer where you want this application installed.

Important

This is the information for the computer on which WFM Builder will run, not the host and port for the Configuration Server computer

7. In the Connections window, select from the drop-down list or browse to your WFM Server Application object, and then click Next.
8. Click Next to open the Log Configuration window.
You can click Run Log Wizard to customize your log settings or click Next to accept the default log settings. You can change these settings at any point by using the Wizard to edit your WFM Builder Application object or by editing the Log section on the Options tab of the WFM Builder Application object. Procedures for editing Options tab settings are described in [WFM Configuration Options](#).
9. To close the WFM Builder Wizard, click Finish.
The Application object appears in the Browse for Application (WFM Builder) window.
10. Select your new WFM Builder Application object and click OK.
The new Application object now appears in the Solution Components list.
11. Click Next to continue.

End of Procedure

Next Step:

- If the WFM Builder Application object was not in the list of Applications when you created your WFM Server Application object (because the object did not exist or had not been specified), add the connections to this component now. See [Adding Connections in the WFM Server Application object](#).


Warning

If you do not add a WFM Builder connection to the WFM Server Application object, Workforce Management will not function correctly.

| - | Creating the Configuration Utility Application Object =

Purpose: To create an Application object for the Configuration Database Utilities.

Start of Procedure

1. In the WFM Solution Wizard WFM Client window, click New.
2. Click the New Application icon ().
The WFM Client Application Wizard Welcome window opens.
3. Click Next.
The WFM Application Name window opens.
4. Enter a name for your WFM Client Application object, and then click Next.
The Installation Package window opens.
5. Select or specify the Source and Destination directories for the Installation Package, and then click Next.
6. On the Installation Ready window, click Next.

7. On the Connections window, browse to or select a DAP Application object from the drop-down list, and then click Next.
8. In the Log Configuration window, click Run Log Wizard to customize your log settings, or click Next to accept the default log settings. You can change these settings at any point by using the Wizard to edit your WFM Client Application object or by editing the Log section on the Options tab of the WFM Client Application object. Procedures for editing Options tab settings are described [WFM Configuration Options](#).
9. To close the WFM Client Application Wizard, click Finish.
The new Application object appears in your Configuration Manager Applications folder.
10. Select your new WFM Client Application object and then click OK.
The new Application object now appears in the Solution Components list.
11. Click Next to continue.

End of Procedure


Next Step:

- Genesys recommends that you add a connection to WFM Server. To do so, open the WFM Client Application object after you finish the sequence of Configuration Wizards and on the Connections tab, add a connection to WFM Server.

| -| Creating the Web Application Object=

Purpose: To create the WFM Web Application object.

Start of Procedure

1. In the WFM Solution Wizard WFM Web window, click New.
2. Click the New Application icon ().
The WFM Web Wizard opens.
3. Click Next to start using the WFM Web Wizard.
4. Enter a name for your WFM Web Application object, and then click Next.
The Server Info window opens.
5. Select the host name and port number for the computer on which you want this application installed, and then click Next.
The Installation Package window opens.
6. Select or specify the Source and Destination directories for the Installation Package, and then click Next.
7. On the Installation Ready page, click Next.
8. Select from the drop-down list or browse to your WFM Server Application object, and then click Next.
9. Click Next.
10. On the Log Configuration window, click Run Log Wizard to customize your log settings, or click Next to accept the default log settings. You can change these settings at any point by using the Wizard to edit your WFM Web Application object or by editing the Log section on the Options tab of the WFM Web Application object. Procedures for editing Options tab settings are described in [WFM Configuration](#)

Options.

11. To close the WFM Web Wizard, click Finish.
The new Application object appears in your Configuration Manager Applications folder.
12. Select your new WFM Web Application object and then click OK.
The new Application object now appears in the Solution Components list.
13. Click Next to continue.
This step completes the WFM Solution Wizard.
14. To close the wizard, click Finish.
Your new WFM Solution appears on the Genesys Wizard Manager Workforce Management window.

End of Procedure

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