Intelligent Workload Distribution Administrator's Guide

8/31/2024

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IWD lets you capture work items, emails and leads ("work items") from existing enterprise workflow systems and create, monitor and manage a single Universal Queue for your contact center. This queue is sorted on business value and prioritized to ensure that the most critical or highest-value work items are distributed to the right resource at the right time, regardless of media type, system or location.

Related documentation:

-

What does IWD do?

Link to video

IWD takes work items from existing enterprise software applications (such as ERP, BPM, DCM, Salesforce, email) and homegrown systems, analyzes the business context of the work item—for example, the associated business process, product requested, or value of the customer making the request—and creates a single Universal Queue, sorted on business value, that ensures that the most critical or highest-value work items are distributed to the right resource at the right time, regardless of media type, system or location.

Use the Cloud iWD API, or provision Engage cloud Email, to create, update or delete work items which IWD then categorizes, prioritizes and routes to employees according to configured rules and assigned routing application logic. A Genesys Designer application handles routing/distribution of the work items, which employees then handle using Agent Workspace.

Monitoring of real-time activity is available in Workload Manager and in Pulse. Historical reporting is also available through Genesys CX Insights.

With IWD, enterprises can effectively manage all customer service resources and business processes across the enterprise, going beyond the walls of the formal contact center and into other areas of the business like branch offices and experts in the back office.

IWD features and functions

- **Business Context Configuration**—IWD allows the source system to either:
  - Pre-classify work items down to the Department and Process level and pass this information on to IWD to match with the appropriate Departments and business Processes in Genesys, against which tasks are then managed and reported on: or;
  - Use IWD Rules to apply rules that classify the work items down to the Department and Process level. When using IWD Rules, adding new departments or business processes is a simple matter of

configuration by a business user.

- **Service Level Agreement-based Prioritization Rules**—The IWD service level rules ensure work items are completed according to the service level agreements (SLA) defined by business users. SLA rules quickly order the work items from most important to least important, based on business value. Because information related to a work item can change, IWD automatically reassesses work items throughout their life cycle, ensuring the most important are at the top of the Universal Queue.
- **Universal Queue Management**—Operations Managers and Team Leads with appropriate security permissions can:
  - View captured work items
  - Hold, resume, and cancel work items
  - Modify work item attributes
  - Manage prioritization schemas

  The same work item management capabilities (except managing prioritization schemas) are also exposed to source systems via the IWD API.
- **Business Insights**—IWD offers a set of work-item-based statistics providing insight into business performance and comparisons against key performance indicators configured in IWD by business users. Business insights are available for the current day, and intraday historically.

How IWD works

Contents

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IWD takes work items from existing enterprise software applications (such as ERP, BPM, DCM, Salesforce, email) and homegrown systems. It analyzes the business context of the work item—for example, the associated business process, product requested, or value of the customer making the request. Then it creates a single Universal Queue, sorted on business value. This ensures that the most critical or highest-value work items are distributed to the right resource at the right time, regardless of media type, system or location.

You use the iWD API to create, update or delete work items. These are then categorized, prioritized and routed to employees according to configured rules and assigned routing application logic. A Genesys Designer application handles routing/distribution of the work items, which are then handled by employees using Agent Workspace.

Monitoring of real-time activity is available in Workload Manager and also in Pulse. Historical reporting is available through Genesys CX Insights.

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Set up IWD

Contents

Learn how to set up IWD, integrate it with third-party source systems and/or email providers, and use the IWD API to submit work items, emails and leads ("work items") to IWD.

Related documentation:

-

Define agents and agent groups

Use Agent Setup to define agents and agent groups who will handle work items from your external systems.

- Define agents and agent groups.
- Your Genesys team will initially configure Role-Based Access Control (RBAC) for all users of Workload Manager.

Enable work item channel

Link to video

Watch this video to learn how to enable work item channel.

Add the following configuration option in Agent Setup to enable the work item channel for your agents or agent groups:

1. Select an agent from the **Users** tab or an agent group from the **Agent Groups** tab.
2. Navigate to **Annex** and find the **interaction-workspace** section.
3. If the **interaction-workspace** section does not exist, click **Add Section** and create it; otherwise, click the **interaction-workspace** section.
4. Click **+** to create a key called **openmedia.workitem-channels**.
5. Assign **workitem** as the value and click **Save**.

Configure Agent Workspace

Configure Agent Workspace for the agents in your contact center.

Create a routing application

Define a routing application in Designer to route work items, leads and email to agents based on skill, agent group, and so on.

Create an application to submit workitems to IWD

Create a third-party system adapter to handle work items that come from your external source and submit them to Genesys. A third-party application such as Salesforce or Netsuite can interact with IWD through the iWD API.

Configure Engage cloud mailboxes

When your Engage cloud email is provisioned (by Genesys), create Mailboxes to process incoming and outgoing email as work items.

Set up notifications back to the source system

Ask your Genesys team to configure other global IWD settings, including setting up notifications back to the source system by configuring a webhook integration. Click here for more detail on webhooks.

You must configure one webhook URL per source system to be configured so that your source system can receive messages about work items back from IWD. Work with your Genesys representative to configure this.

Configure the IWD application

Use Workload Manager to:

- Create Endpoints that correspond to the target endpoints created in your Designer routing application.
- Create Categories that correspond to specific departments or business processes and their hierarchies (business context). Associate each category with an Endpoint. Create a set of Service Level Agreement-based rules for how work items in each Category are to be handled.
- Create Prioritization schemas that control the logic and speed with which work items are (re-)prioritized both before and after their Service Level Agreement. Associate the schemas to Categories.
- Create Engage cloud Email mailboxes for your IWD solution.
- Provision or create Standard Response Library content to use in auto-acknowledgement emails.

Start/update/stop a work item

The typical workflow is as follows:

1. The application creates a work item through the IWD API.
2. The application updates the work item through the IWD API (if needed).
3. The application stops the work item.

There are two ways for the application to stop an interaction:

- Implicit (recommended)—stop by invoking Mark Done. For this method, complete the following steps:
    1. Set up Agent Workspace to use the Service Client API.
    2. Disable the **Mark Done** button in Agent Workspace (as mentioned earlier in Configuring Agent Workspace and instead invoke the **markdone** method.
    3. Set the disposition code by invoking the **setUserData** method.
- Explicit—stop by using the IWD API. This requires additional configuration from your Genesys representative.

A sample application that demonstrates using the IWD API is also available through your Genesys representative.

Monitor and manage the Universal Queue

- Monitor the near real-time activity of your contact center as IWD manages the universal queue of work items.
- Manage individual work items or groups of them while IWD queues and distributes them.

Report on contact center activity

- Report on historical contact center activity using Genesys CX Insights.
- Report on real-time activity through the Workload Manager Monitoring features on the **Dashboards** tab and through Genesys Pulse.

Test IWD provisioning

Create an end-to-end test of your IWD provisioning setup in conjunction with the supplied CIWD Designer sample application.

Related documentation:

-

1. Create an interaction with this cURL command that will set the work item's activation time to three minutes in the future.

```
curl --location --request POST 'https:///iwd/v3/items' \
 --header 'Content-Type: application/json' \
 --header 'x-api-key: ' \
 --data-raw '{
 "external_id":"e21c3332-eecd-4f3b-8a7f-c90",
 "FirstName":"Leonardo123",
 "LastName":"Doe",
 "EmailAddress":"Leonardo123@Doe.com",
 "PhoneNumber": "(925)555-1236499",
 "activate":"2020-02-18T11:35:03.077Z"    //Sample timestamp. Can be set to 3
minutes ahead of current time
 }'
```

2. Check that the interaction appears in real time reporting by creating IWD Queue Activity and IWD Agent Activity widgets based on the Genesys-supplied widget templates.
3. Check that the interaction appears as expected in Workload Manager.
    1. In the Workload Manager **Universal Queue** tab, check Search, filter and modify work items.
    2. In the Workload Manager **Dashboards** tab, check Category-based graphs and statistics.
    3. In the Workload Manager **Configuration** tab, check the configuration of Category tree, Priority and Endpoints.
4. Check work item routing to an agent.
5. Login workspace employee #1 with the following skill profile:
    - `GSYS_skill_1 > 5`
    - `GSYS_skill_2 > 2`
    - `GSYS_skill_3 > 2`

6. Make employee #1 ready.
7. Three minutes after receipt, the work item should be routed to employee #1.
8. Open the work item.
9. Disposition the work item.
10. View the transfer in real time reporting by using the IWD Queue Activity and IWD Agent Activity templates described above.
11. Wait for 15 minutes.
12. Check the Genesys CX Insights for IWD reports.

Roles and privileges for Workload Manager users

Understand, assign and edit the access privileges of the different Workload Manager users (roles). Genesys Professional Services configure roles and privileges initially, using the default values described in this page.

Related documentation:

-

Privilege name	Roles			
	IWD Business User	IWD Supervisor	IWD User	Notes
Work items (**Universal Queue** tab in Workload Manager)				
iWD.Workitems.canView	X	X	X	Requires iWD.Workitems.Search.canExecute privilege.
iWD.Workitems.canRead	X	X	X	
iWD.Workitems.canDelete	X	X		
iWD.Workitems.canUpdate	X	X		
iWD.Workitems.canCreate	X			
iWD.Workitems.BulkActions.canExecute	X			
iWD.Workitems.Activate.canExecute	X	X		
iWD.Workitems.Search.canExecute	X	X	X	
iWD.Workitems.Export.canExecute	X			
iWD.Workitems.Hold.canExecute	X	X		
iWD.Workitems.Cancel.canExecute	X	X		
iWD.Workitems.Resume.canExecute	X	X		Only Held work items can be resumed.
iWD.Workitems.Restart.canExecute	X	X		

Privilege name	Roles			
Dashboard (**Dashboards** tab)				
iWD.Dashboard.canView	X	X	X	Requires iWD.Workitems.Search.canExecut privilege.
Configuration (**Configuration** tab)				
iWD.Settings.canView	X	X	X	
Configuration/Categories				
iWD.Categories.canView	X	X	X	Requires iWD.Categories.canRead privilege.
iWD.Categories.canRead	X	X	X	
iWD.Categories.canUpdate	X			
Configuration/Prioritization				
iWD.Prioritization.canView	X	X	X	Requires iWD.Prioritization.canRead privilege.
iWD.Prioritization.canRead	X	X	X	
iWD.Prioritization.canUpdate	X			
Configuration/Endpoints				
iWD.Endpoints.canView	X	X	X	Requires iWD.Endpoints.canRead privilege.
iWD.Endpoints.canRead	X	X	X	
iWD.Endpoints.canUpdate	X			
Configuration/Mailboxes				
iWD.Mailboxes.canView	X	X	X	
iWD.Mailboxes.canRead	X	X		
iWD.Mailboxes.canUpdate	X			Requires iWD.Mailboxes.canRead privilege.
Filters				
iWD.Filters.canView	X	X	X	
iWD.Filters.canRead	X	X	X	
iWD.Filters.canUpdate	X	X		Requires iWD.Filters.canRead privilege.

- Read privilege indicates that the user can make a database query.
- View privilege indicates ability to view in the user interface.
- Role definitions:
  - **IWD User**: View-only. No access to edit functions.

- **IWD Supervisor**: Manages a small team of agents in a business unit. Can make changes to work items.
- **IWD Business User**: Manages all business specific configuration: Categories, Endpoints, Mailboxes, but not submitter, setup or webhooks.
- **IWD Administrator** (not shown above): Genesys Professional Services only.

Integrate IWD with Genesys Workforce Management (WFM)

Contents

-
- Administrator

Collect WFM statistics for your contact center workforce by integrating IWD with Genesys Workforce Management (WFM).

Related documentation:

-

Overview

> **Important**
> Integration with WFM is not supported on Azure.

To improve management of your contact center workforce, you can integrate IWD with Genesys Workforce Management (WFM). To enable WFM functionality, WFM processes three metrics for each activity every 15 minutes:

- **Interaction Volume** ("new")—The total number of work items placed in IWD categories that correspond to the activity in the last 15-minute time interval.
- **Average Handle Time (AHT)**—The total time agents spent working on work items divided by the total number of workitems processed.
- **Actual Queue** ("backlog")—The number of pending interactions (not completed yet) at the end of the last 15-minute time interval in all iWD categories corresponding to the activity.

IWD Data Mart provides **Interaction Volume** and **Actual Queue.** WFM reads **Average Handle Time** from Stat Server.

> **Important**
> 1. Do not specify Stat Server metrics for **Interaction Volume** and **Actual Queue** during iWD Activity configuration in WFM. Doing this causes values from Stat Server to override metrics obtained from iWD Data Mart, which in turn causes WFM to show incorrect numbers.
> 2. If Data Mart fails to send data to WFM, it tries to send metrics for all missed intervals during the next run.

Limitations

- You must provision and configure tenants manually using Configuration Manager.
- If iWD reclassifies a work item after reporting it to WFM for the first time, it will not be reported as **PERF_ITEM_ACT_IV** but will be reported in **PERF_ITEM_ACT_QUEUE** on subsequent interval.

> **Important**
>
> Take into account the fact that IWD Data Mart runs every 15 minutes, which does not necessarily match WFM intervals' boundaries. So there could be delays in data becoming visible in WFM.

Configure IWD/WFM integration

1. Configure Filters for the selected IWD Categories to make it possible to calculate AHT for the corresponding Activities:
   1. Connect to the tenant Configuration Server.
   2. Create Metrics in WFM Stat Server.
   3. Go to **Applications > *region* > WFM > SS_WFM > Application Options**.
   4. Add a new option under the **Filters** section,
      To describe the exact path:

      ```
      =PairExists("category_path","||..")
      ```

      For example:

      ```
      WFMTestLevel2_Filter=PairExists("category_path","Level1|Level2")
      WFMTestLevel3_Filter=PairExists("category_path","Level1|Level2|Level3)
      ```

      .
      You can use an asterisk (*) at the end of the path to substitute for all subcategories:

      ```
      WFMTestLevel2Subcat_Filter=PairExists("category_path","Level1*")
      WFMTestLevel3Subcat_Filter=PairExists("category_path","Level1|Level2*")
      ```

      .
      To use this feature you must first enable the filters-allow-wildcards-in-values option in Stat Server WFM.
   5. Ensure you set the required properties for your activity, for example:

      The **WFM_Workitem_Interactions_Processed** section with the following options

      ```
      [WFM_Workitem_Interactions_Processed]

      Category=TotalNumber
      Description=The total number of interactions that were handled by this resource
      during the specified period.
      ```

```
MainMask=InteractionHandling
MediaType=workitem
Objects=Agent,GroupAgents,GroupPlaces,Place
Subject=Action
```

The **WFM_Workitem_Interaction_Processing_Time** section with following options

```
[WFM_Workitem_Interactions_Processing_Time]
Category=TotalTime
Description=The total amount of time that this resource spent handling interactions
during the specified period.
MainMask=InteractionHandling
MediaType=workitem
Objects=Agent,GroupAgents,GroupPlaces,Place
Subject=AgentStatus
```

6. Save the changes.
7. Open **Applications > *region* > WFM > SS_WFM_B > Application Options**
8. Repeat steps 3 through 6.

2. Create WFM Activities as regular Activities or Multi-Site Activities taking into account the following guidelines taking into account the following guidelines:
   1. Create one Activity of type **Deferred** per category with the following rules:
      - A slash ("/") separated string of up to 10 levels of categories: **Category_Level1[/Category_Level2[/Category_Level3[...[/Category_Level10]]]]** The exact full path to each category is required with an identical name as in iWD without tail padding. iWD does the padding between the last significant category level and the end of the maximum category level with the **Unclassified** value, while you may not use tail padding in WFM activities configuration. For example:

        ```
            activity name                    iwd name
        Level1                                 Level1/Unclassified/
        Unclassified/../Unclassified
        Level1/Level2                    Level1/Level2/Unclassified/../Unclassified
        Level1/Level2/Level3             Level1/Level2/Level3/Unclassified/../Unclassified
        ...
        ```

      - Usage of wildcard ("/*") following a category level (for example, **Category_Level1/***) matches all subcategories to **Category_Level1**.
        Example:

        ```
        Category_Level1/Category_Level2/*
        Category_Level1/Category_Level2/Category_Level3/*
        ```

   2. Create a special Activity named **Default** to handle unclassified work items, and create a separate Filter for it as described in step 1.
   3. Configure the **Average Handle Time (AHT)** statistic for each Activity as follows:
      1. Open **WFM Web for Supervisors > Configuration > Activities**.
      2. Open the **Activity > Statistics** tab and click **Add,** then configure the following:
         - **Type** = `Handle Time`.
         - Either **Group of Agents** or **Group of Places** depending on your needs.

- **Total Handle Time** = `WFM_Workitem_Interactions_Processing_Time` or `WFM_Email_Interactions_Processing_Time`.
- **Interactions Handled** =`WFM_Workitem_Interactions_Processed` or `WFM_Email_Interactions_Processed`.
- **Filters** = ..

3. Click **Apply**
4. Save the Activity.

Prepare for Office 365 integration

Contents

Prepare to set up Office 365 mailboxes by adding a new Enterprise Application in the Azure Active Directory (AD) portal. This one-time authorization procedure is a prerequisite for setting up Office 365 mailboxes.

Related documentation:

-

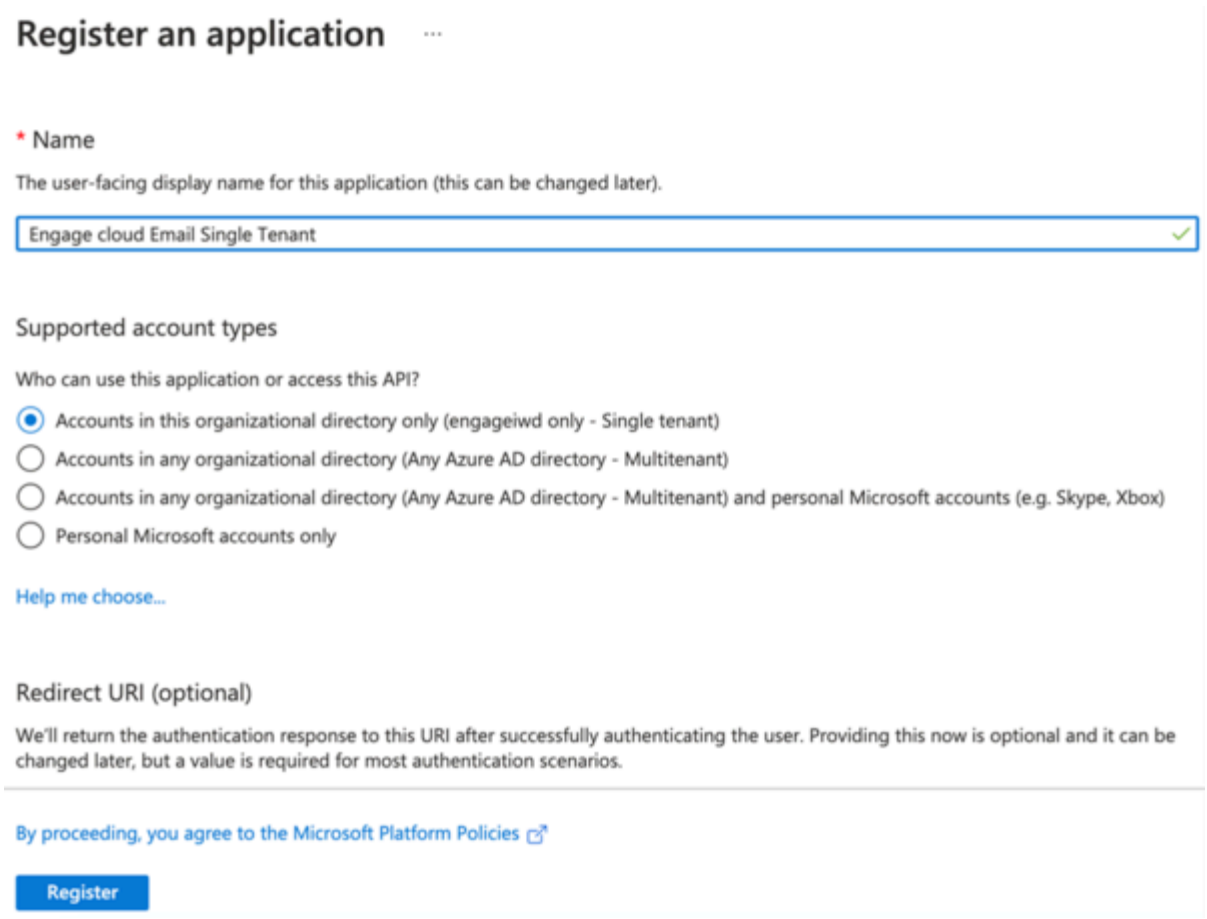
Authorization using client credentials grant flow

In order to avoid manual re-login for mailboxes that do not have a valid token, Genesys recommends using Client Credentials grant authentication for accessing Office365 using Graph API.

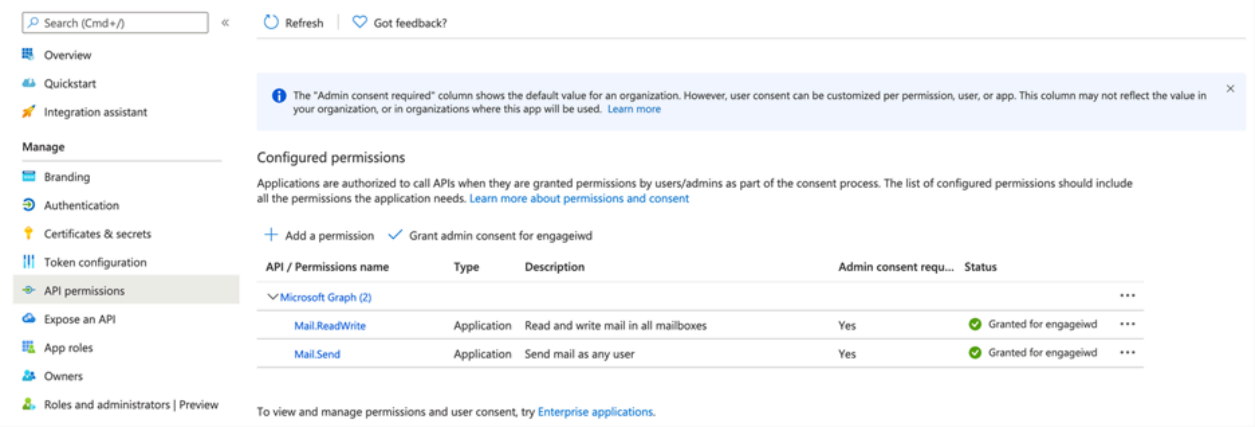
Provisioning procedure is described below:

> **Important**
>
> You must follow Steps 1 - 4 only if you do not have a registered application. You can skip to Step 5 if you already have an application.

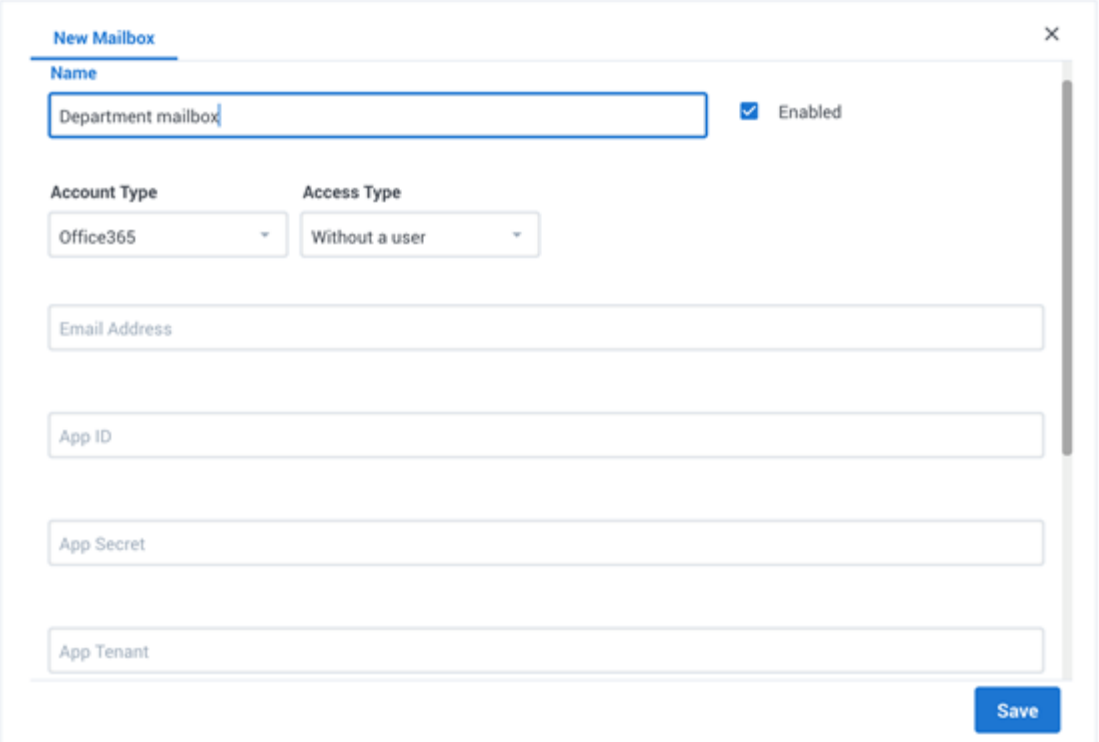
1. Sign in to Azure AD portal, go to **Application Registrations** and click on **New Registration**.
2. Enter a name for your application, for example *Engage cloud Email Single Tenant*.
3. Select **Accounts in this organizational directory only (Single tenant)**, unless you have multiple tenants that must use this app. Click **Register**.



4. Navigate to **API Permissions** and add the **Mail.ReadWrite** and **Mail.Send** API permissions for Microsoft Graph.



5. In Workload Manager, configure a mailbox with Account Type **Office365** and Access Type **Without a User.**



6. Enter the application ID, tenant ID, and secret for the application that you configure in the Azure portal, and click **Save**.

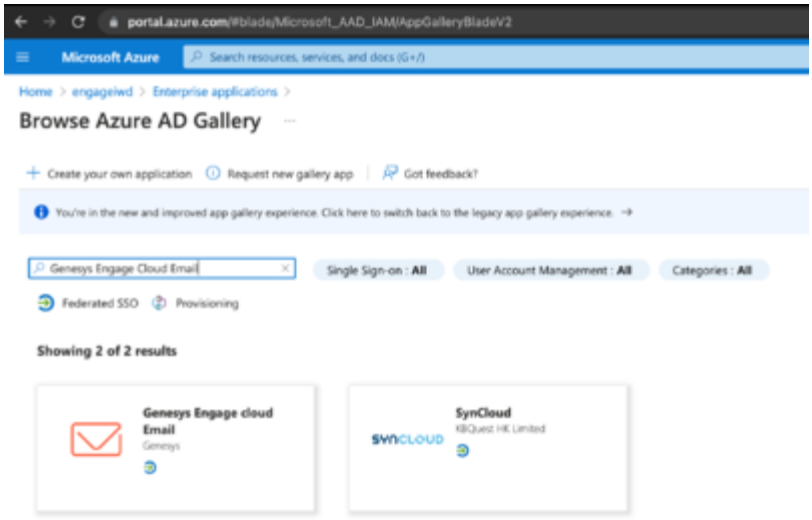
It is recommended that you follow the Microsoft documentation to limit application access to only specific mailboxes: Limiting application permissions to specific Exchange Online mailboxes.

For instructions on how to configure the Office 365 mailbox, see View, edit, and create Genesys Multicloud CX Email boxes. If you are already logged in to Office365 (for example, to access your own corporate mailbox), open Workload Manager in an *Incognito* browser window for mailbox configuration sign-in with Microsoft.

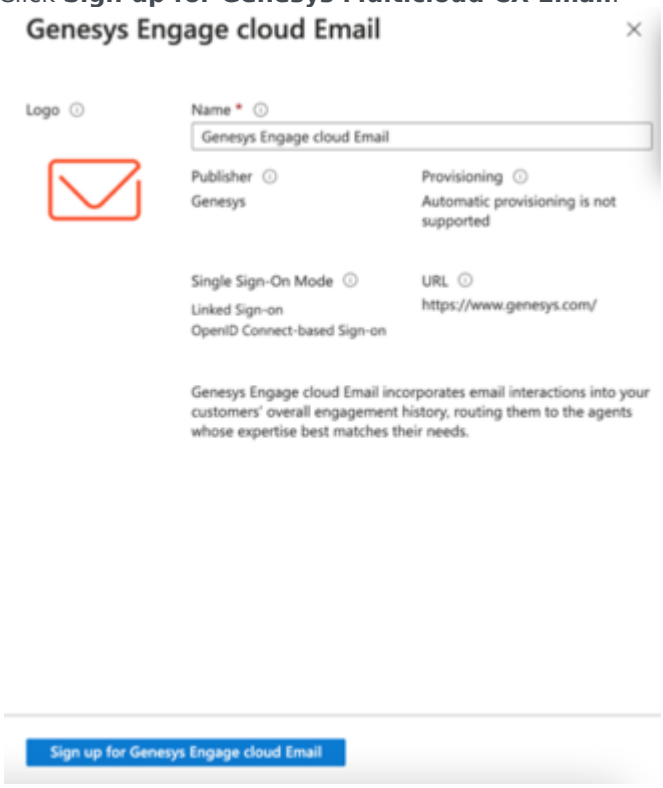
Authorization on behalf of the user

Azure AD administrators who manage the customer's Office 365 account must add the required Enterprise Application using the following steps:

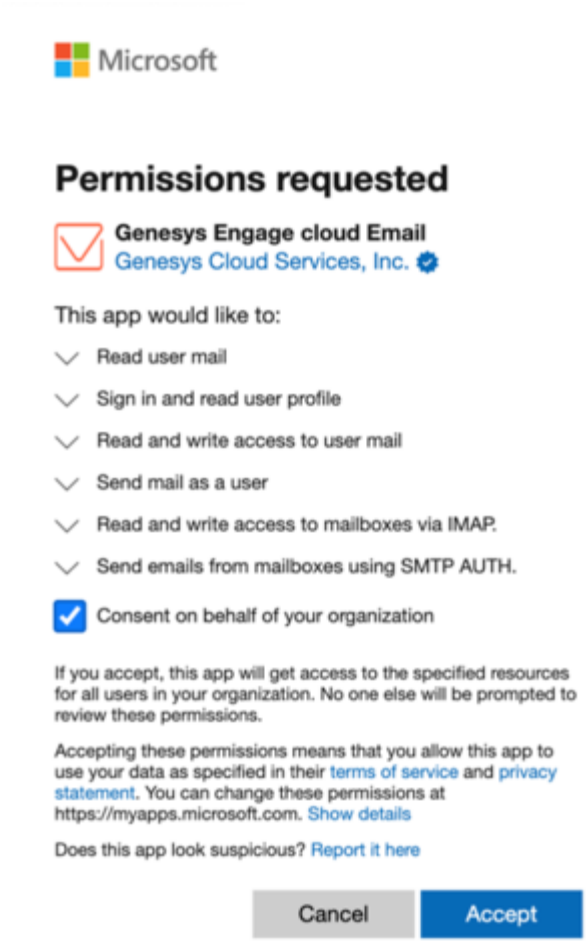
1. Sign in to Azure AD portal and search for *Genesys Multicloud CX Email*.
2. Select the **Genesys Multicloud CX Email** app.



3. Click **Sign up for Genesys Multicloud CX Email**.



4. Select **Consent on behalf of your organization** and click **Accept** after reviewing the permissions requested.



You will be redirected to the Workload Manager login page. Close the login page as it is not required at this stage.

For instructions on how to configure the Office 365 mailbox, see View, edit, and create Genesys Multicloud CX Email boxes.

FAQs

Contents

FAQs, hints, tips and best practices for your IWD implementation.

Related documentation:

-

Q: Can I submit priority as a string?

A: No, priority must be an integer. Priorities submitted as strings are treated as zeros. Read this topic.

Q: What happens when a work item already contains a value in the Priority field?

A: If a work item contains a priority when it is being ingested through the API, that priority is added to the priority assigned to it by the Prioritization schema for its Category. Effectively, it serves as a booster.

For example, if you submit a new work item with a priority of **7** for the category **Gold**, the work item is created with the default starting value for the **Gold** category plus the value in the submission. Thus, if the starting priority for **Gold** is **5**, the new work item's priority is boosted to **12** (5+7)**.**

Configure IWD

Summarizes and links to the **five** main articles that describe Workload Manager's **Configuration** tab, where you can configure your IWD implementation.

Related documentation:

•

The **Configuration** tab of Workload Manager lets administrators do the following:

- View Summary details of all categories, prioritization schemas and endpoints. You can also search the displayed items and export displayed items to .CSV format.
- View, edit and create the Categories displayed in the collapsible Categories panel. Categories correspond to business units, lines of business, departments or business processes.
- View, edit and create different Prioritization schemas that will be assigned to Categories for handling the Prioritization and escalation of the work items and/or emails in those Categories.
- View, edit and create Endpoints that can be associated with different Designer applications and assigned to the Categories.
- View, edit and create Mailboxes that can handle incoming email as work items, as well as manage outgoing email.

Important

Ask your Genesys team to configure other IWD settings, including notifications back to the source system.

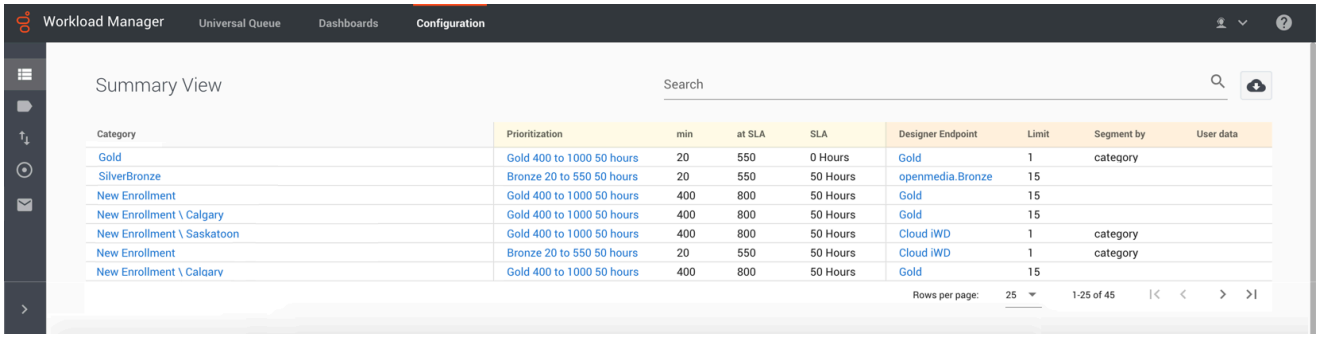
View Summary

Shows what the **Summary View** tab contains.

Related documentation:

-

The **Summary View** tab in the **Configuration** tab shows a display of all categories, prioritization schemas, endpoints and service level agreements.



View, edit, and create Categories and Rules

Contents

Work with the Categories that segment your work items, emails and leads ("work items") and the Rules that control how work items are processed.

Related documentation:

-

> **Important**
> Changes to Categories can have significant impacts on contact center operation.

Each node in the Category tree corresponds to a business unit, department or process that handles a specific set of work items for a specific purpose. Each node (Category or sub-Category) is associated with a Prioritization schema that controls prioritization of work items. Each node also specifies a Designer Endpoint at which its work items are targeted, and enables you to define rules for how work items are assigned to it.

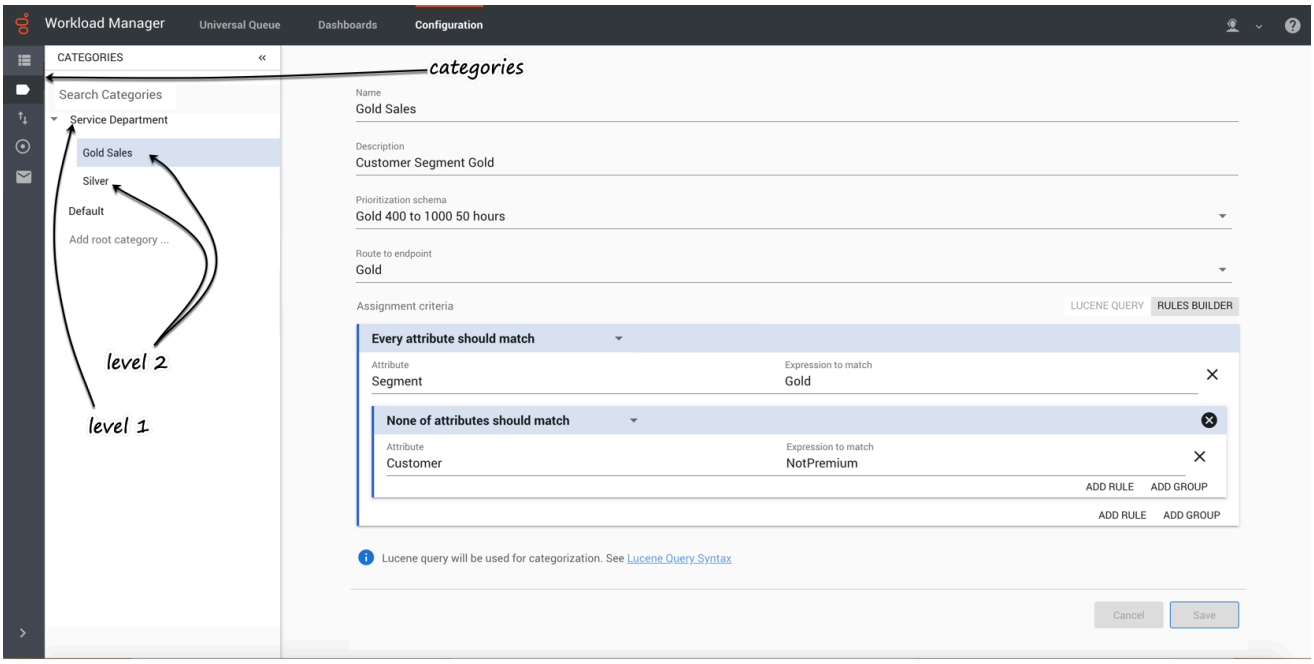
View and edit a Category

Link to video

On the **Configuration** tab, from the collapsible **Categories** panel, select the Category you want to view or edit.

The Prioritization schema and the Designer Endpoint associated with this Category are displayed. You can edit them if you have the appropriate privileges. Designer applications are loaded on the Designer Endpoint in order to match the segmented work items with employees.

Category levels and reporting



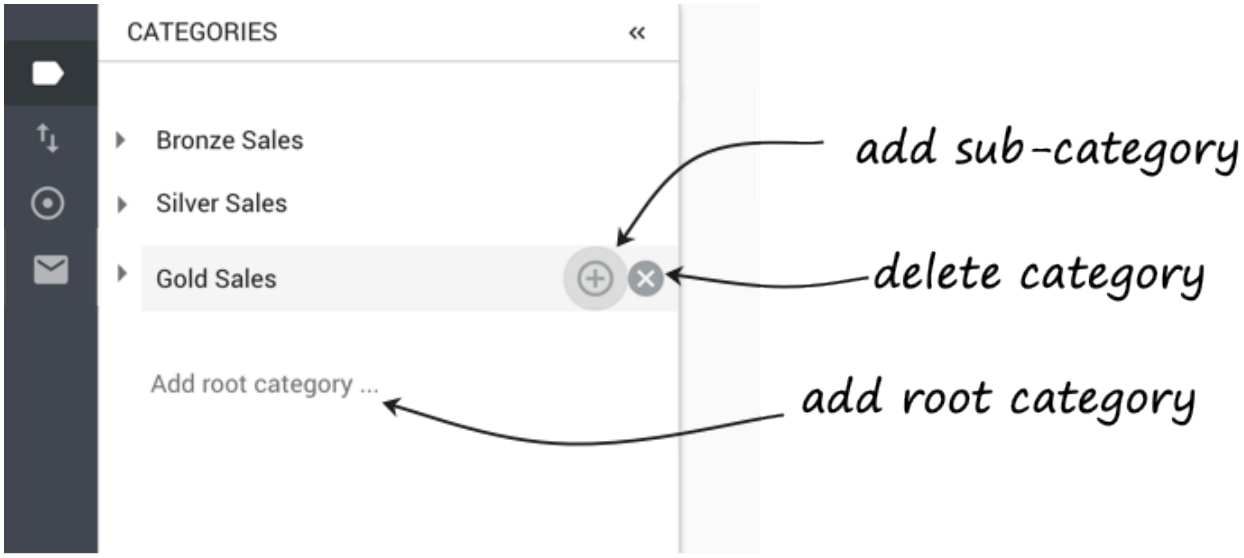
The first level of Category (**Service Department** in the screenshot above) translates to the Department in historical reporting (for example, here).

The second level of Category (**Gold Sales**, **Silver** in the screenshot above) translates to the Process in historical reporting (for example, here).

Historical reporting reports up to 10 levels of the IWD Category structure, which correspond to Departments and Processes.

The first level filters all work items that match the Category's criteria. Any sub-levels further filter work items that match the first-level criteria as well as the sub-level's criteria. In this way you can create a hierarchy that funnels work items through to lower levels of specificity so you can handle them in more specific ways.

Add/delete controls



- To add a new root category, at the bottom of the collapsible **Categories** panel, click **Add root category...**
- To add a sub-category to an existing category, click the + button to the right of the parent Category's name.
- To delete a Category click the X button to the right of the Category's name.

> **Warning**
> You cannot undo deletion of a Category.

Create a new Category

Link to video

1. Select the **Configuration** tab.
2. Open the collapsible **Categories** panel.
3. Click either **Add root category...** or, to create a new sub-Category, the **+** symbol next to an existing Category .
4. Give the new Category a name. For a sub-Category, enter a name that follows the naming convention for the root or parent Category, for example:
   [source system] [department][process] high-level criterion
5. Give the Category a business-friendly description. Include the rule intention if possible (see the examples below).
6. From the drop-down list, select a Prioritization schema for this Category.
7. From the **Route to Endpoint** drop-down list, select a Designer Endpoint for this Category.

8. In the **Assignment criteria** section, create a rule or group of rules, or a Lucene query, that will determine which work items IWD assigns to this Category. The examples below illustrate some relatively simple rules and rule groups.

> **Tip**
> You can use Lucene query syntax in describing Categories and creating rules and rule groups.

9. Click **Save** when you're done.

Rules

Link to video

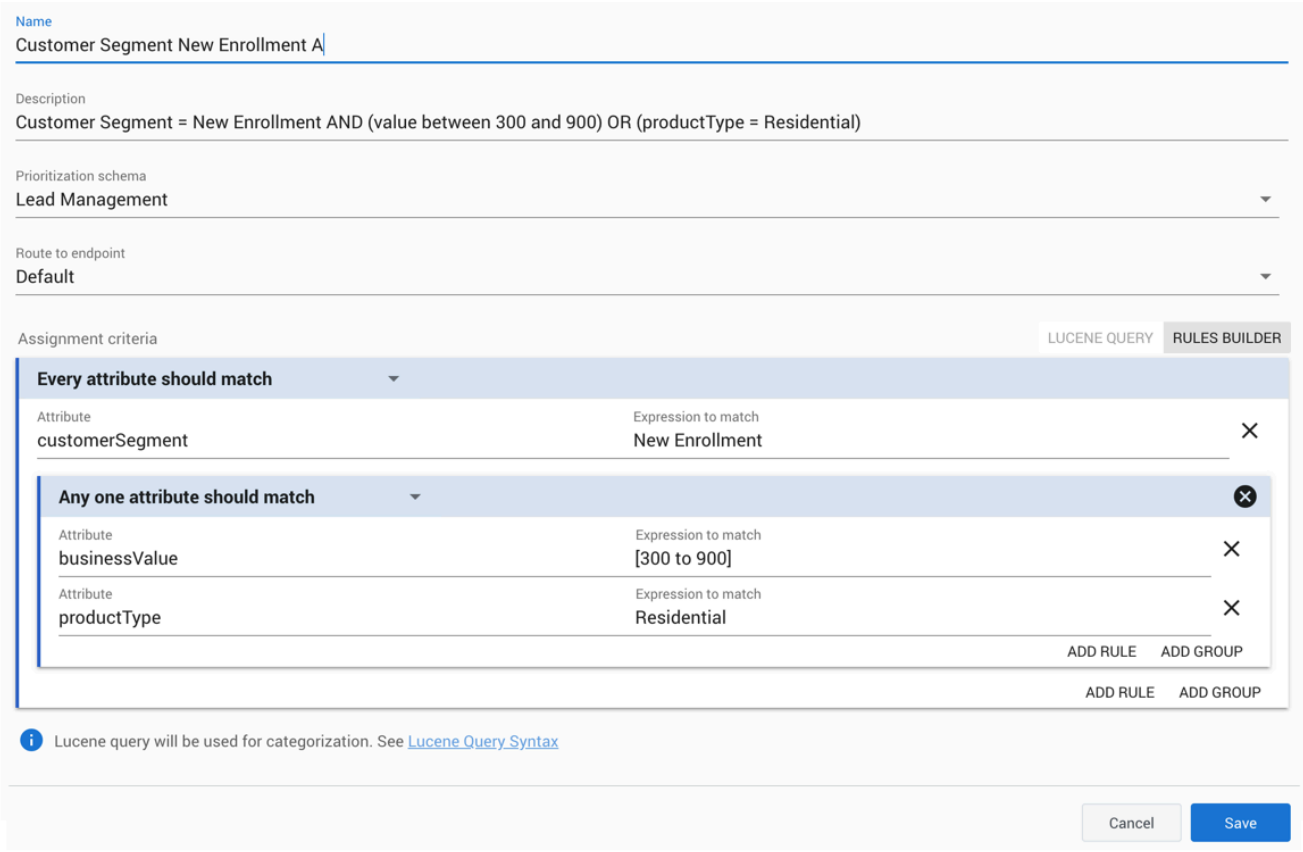
The **Assignment criteria** panel shows which rules and rule groups have been set up for this Category (with the **RULES BUILDER** button selected). Rules determine which work items are assigned to this Category. Rule groups are bundles of more than one rule. Rule groups can be coupled with standalone rules. (You can only nest rule groups down to the third level.) Every Category must have at least one rule configured. See the sample rules below.

Lucene queries

You can configure a Category by selecting the Lucene query option and entering Lucene query syntax in the field that displays:

Work items retrieved by the Lucene search will be assigned to this Category.

Rules examples

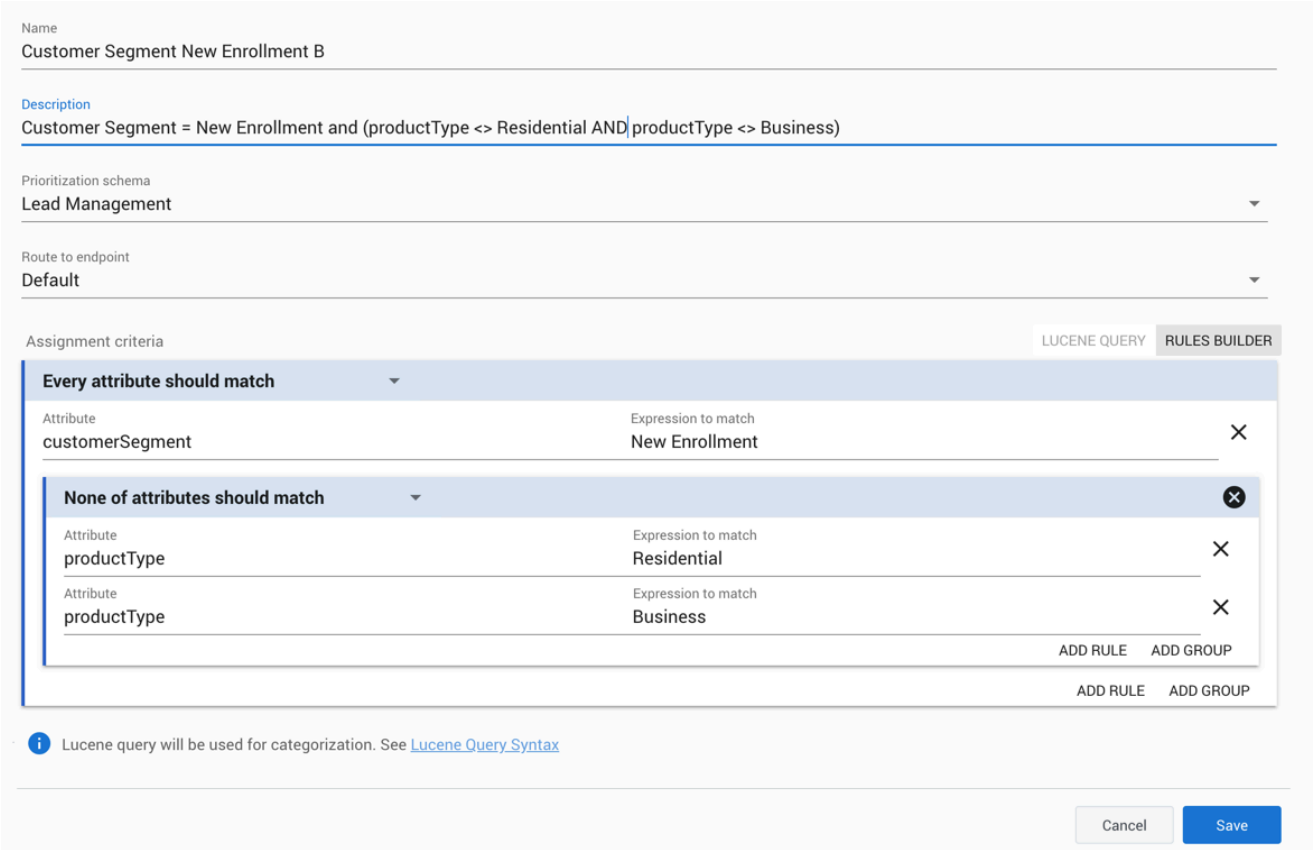


Example 1

This rule assigns work items to this Category if they meet the following conditions:

The value of their **customerSegment** attribute is `New Enrollment`
AND
EITHER
the value of their **businessValue** attribute is between `300` and `900`
OR

the value of their **productType** attribute is `Residential`.

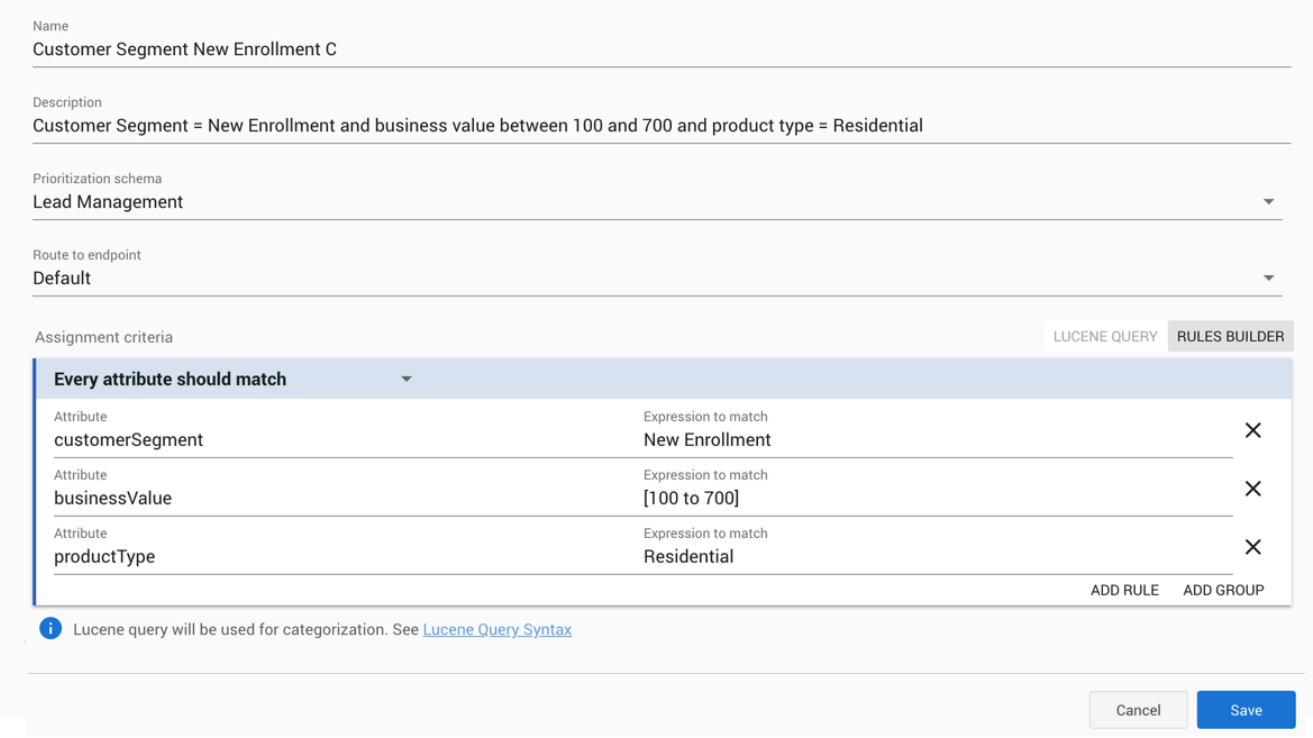


Example 2

This rule assigns work items to this Category if they meet the following conditions:

The value of their **customerSegment** attribute is `New Enrollment`
AND
NEITHER
the value of their **productType** attribute is `Residential`
NOR

the value of their **productType** attribute is `Business`



Example 3

This rule assigns work items to this Category if they meet the following conditions:

The value of their **customerSegment** attribute is `New Enrollment`
AND
the value of their **businessValue** attribute is between `100` and `700`
AND

the value of their **productType** attribute is `Residential`.

Test assignment criteria

You can validate a Category and its rules (configured via Rules Builder or Lucene query) against an existing work item or a manually created work item. By this way, you can find out whether the ruleset matches the work item or not and if there are any errors with categorization in relation to the sample work item.

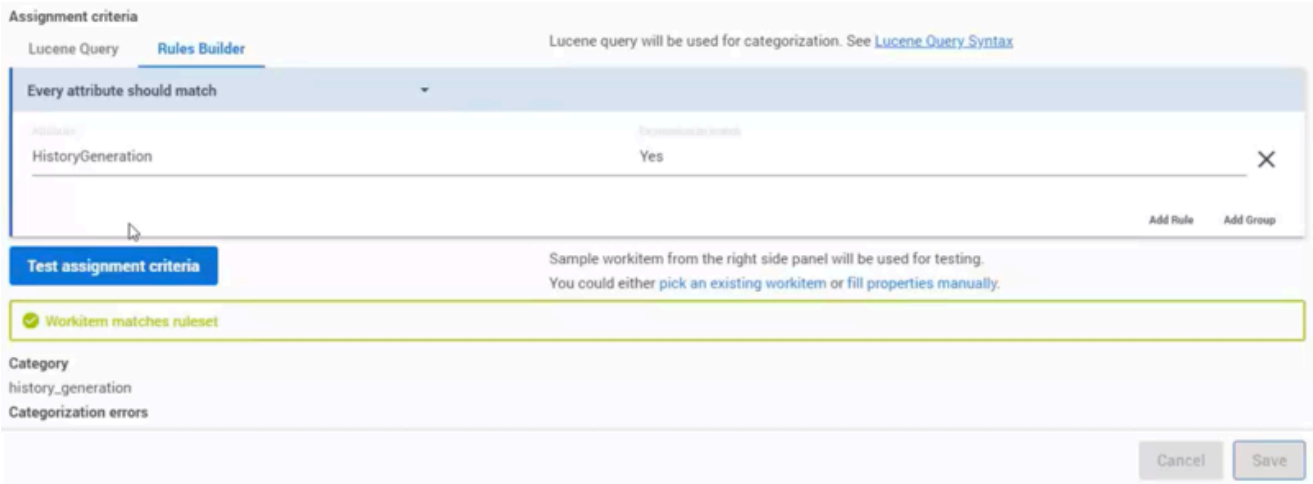
Process

1. Select the **Configuration** tab.
2. Open the collapsible **Categories** panel.
3. Select a Category and click **pick an existing workitem** in the **Assignment criteria** section. The

Universal Queue page is displayed.

> **Tip**
> Alternatively, you can also choose to fill in properties of the sample workitem manually using the fill properties manually option.

4. Select an existing work item and click . The **Categories** panel is displayed again with the selected work item as the sample work item in the right pane.
5. [Optional] You can make changes to the rules and sample work item attributes as needed.
6. Click **Test assignment criteria**. The result contains the following information:
   - Indicates if the ruleset matches the sample work item or not.
   - Shows the first Category in the **Categories** list that matches the sample work item attributes.
   - It also indicates if there are any categorization errors.



The sample work item can either be an existing work item that you select from the Universal Queue or a manually created work item for Categories testing. If you use an existing work item for testing, any change you make to the attributes in the **Sample Workitem** panel will not affect the original work item. However, the changes that you make in the Category itself are captured if you click **Save**.

Configure a Category-level email auto-acknowledgement

> **Important**
> Auto-acknowledgements configured at the mailbox level will negate any corresponding

> configurations at the Category level.

Prerequisite

The content of auto-acknowledgement emails is created and stored in a Standard Response Library (SRL). To set up an SRL you need either eServices Manager or Designer, depending on your implementation.

Process

The process for setting up a Category-level auto-acknowledgement email is as follows:

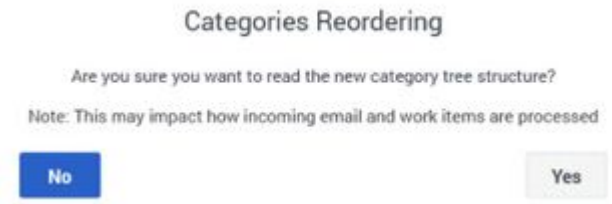
1. You create an IWD Category tree (for incoming email) that:
    1. Contains rules that segments email(s) into specific groups for a particular auto-acknowledgement.
    2. Is named indentically to the category tree path configured in the SRL that contains the required auto-acknowledgment content. Spelling and punctuation must match exactly. If there are any discrepancies, no auto-acknowledgement is sent.
2. If a matching category path is found, IWD selects from that category the **Active** standard response that has usage marked for **Acknowledgement.**
   If no match is found, or no standard response is configured in that category, no auto-acknowledgement email is generated.

Reorder Categories

Link to video

You can drag and drop categories in the **Categories** panel to arrange them in a specific order.

1. Select the **Configuration** tab.
2. Open the collapsible **Categories** panel.
3. Drag a Category to change its position in the list. To increase its level, drag the Category to the right of another Category. To decrease its level, drag the Category to the left. While performing drag-and-drop, the entire impacted Category tree is highlighted in blue color to assist you.
4. Drop the selected Category in the required position and click **Save**. If you must cancel the changes, click **Cancel**. A confirmation message appears if you click **Save**.
5. Click **Yes** on the **Categories Reordering** window to update the Categories tree.



View, edit, and create Prioritization schemas

Contents

Set up and work with the Prioritization schemas that control the initial prioritization and subsequent reprioritization of work items, emails and leads ("work items").

Related documentation:

-

> **Important**
> Changes to prioritization schemas can have significant impacts on contact center operation.

A Prioritization schema defines an initial priority for new work items in a Category, plus the timestamp (work item age) at which subsequent reprioritizations take place and what the new priority value at each reprioritization will be. It also defines the Service Level Agreement (SLA) for the Category, and how work items are prioritized post-SLA. A schema can be used by multiple Categories.

> **Important**
> Genesys recommends that you start with simple linear prioritization for their environments. As you become more accustomed to how prioritization works in your environment, you can evolve to a more complex prioritization graph. To increase the probability of work items being assigned to an employee, Genesys also recommends that you reduce the interval as the SLA approaches, because the priority is used to reflect the business value of the work. You can refine the graph by dragging and dropping the curve to represent the business value of the work item over the expected lifecycle. So if there are tiered penalties for work items that breach their due date and time, you can arrange the graph after SLA to reflect these tiers.

View and edit Prioritization schema

Link to video

On the **Configuration** tab, select the **Prioritization** tool from the left toolbar. This displays Prioritization schema details. You can edit them if you have the appropriate privileges.

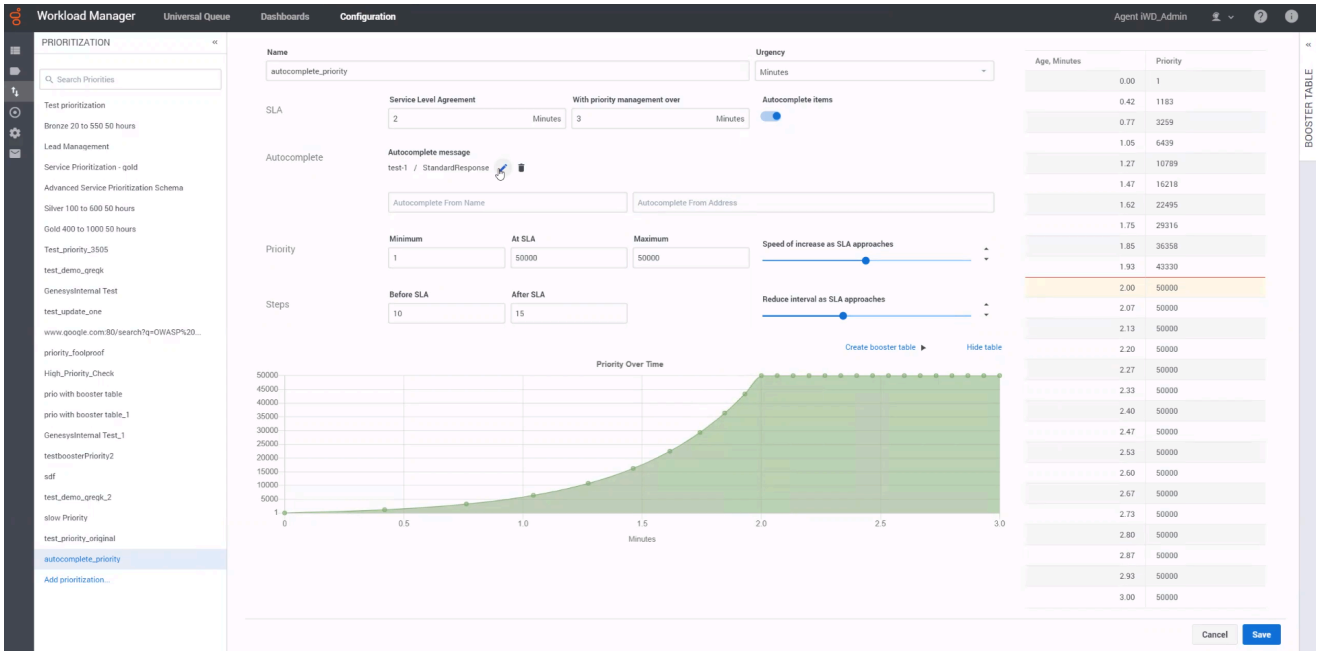
You can edit the schema by:

- Changing the values in any of the fields in the top part of the panel.
- Changing the priority values directly in the hideable table on the right of the panel.
- Dragging the individual data points up or down on the **Priority over time** graph.

Use the **Cancel** button to abandon all changes entered on the page.

Use the **Reset** button to reset changes made in the graph and priority tables.

Field names

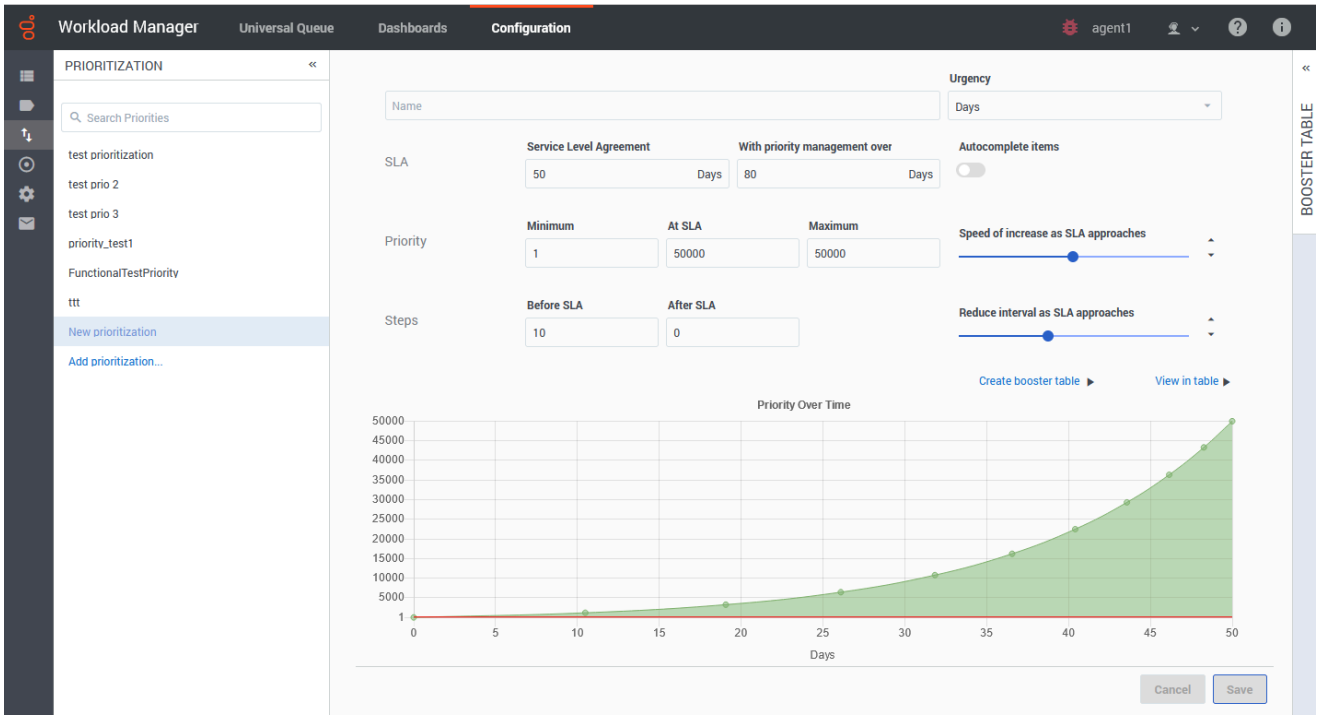


> **Important**
>
> Changes that you make in the static fields and in the table are reflected dynamically in the **Priority over time** graph.

- **Name**—The schema name.
- **Urgency**—The units in which the intervals for calculation are denominated: Days, Hours or Minutes.
- **SLA**—The interval (Days, Hours or Minutes) by the end of which work items must be completed.
- **With priority management over**—The duration of managing and monitoring an email or a work item. This period includes the time to reach the SLA. For example, if an email is set to reach SLA by 2 minutes and it is to be managed for an additional minute post SLA, you must set the **With priority management over** value to 3 minutes.

- **Autocomplete items**—Enable this option to automatically complete a work item or email at the end of the period specified in the **With priority management over** setting. The work item or email is cancelled in the Universal Queue after this period.
- **Autocomplete message**—If the **Autocomplete items** option is enabled, you can configure a Standard Response that must be sent to the customer upon an email auto-completion. You can also set the *From Name* and *From Address* from which the message must be sent. This message is not applicable for work items.
- **Priority**—Minimum, SLA and Maximum priorities for the work items.
- **Speed of increase as SLA approaches**—Use the slider bar to accelerate or decelerate the change in priority when work items under this schema are reprioritized before their SLA. As you move the slider bar, the curvature of the **Priority over time** graph changes dynamically to reflect the changes. A straighter line indicates a more single-speed regime. A more curved line indicates acceleration as the SLA approaches.
- **Steps**—The number of times the work items under this schema are reprioritized, both before and after their SLA.
- **Reduce interval as SLA approaches**—Use the slider bar to alter the interval between reprioritization steps as the SLA approaches.

Add a new Prioritization schema



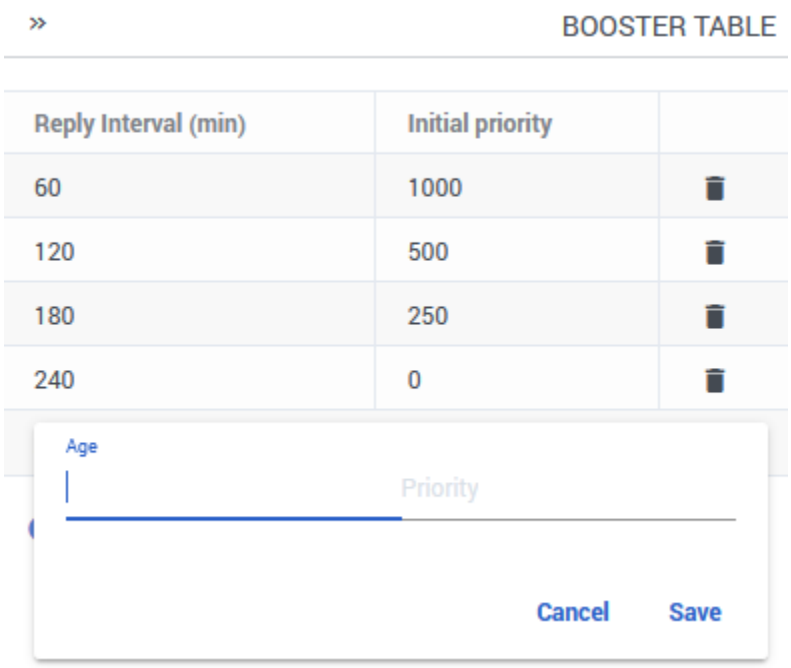
To create a new Prioritization schema, on the **Configuration** tab, select the **Prioritization** tool from the left toolbar and click **Add prioritization...**

Use the field definitions above to set up your new schema. Some fields have default values, listed

here:

- **Urgency**—Days
- **SLA**—50
- **With priority management over**—80
- **Autocomplete items**—disabled
- **Priority**
  - **Minimum**—1
  - **At SLA**—50000
  - **Maximum**—50000
- **Steps**
  - **Before SLA**—10
  - **After SLA**—0

Booster Table



The priority booster table allows you to boost the initial priority of a customer’s reply email to an agent when the customer replies to the agent quickly. Initial priority is added to the priority value calculated from the prioritization schema.

For example, you can set a high initial priority of the reply email when a customer replies to an

agent’s email within 20 minutes. You can set different boost priorities for different reply intervals.

To add boost priority for a reply interval,

1. Open the collapsible **Booster Table** on the right-side of the prioritization schema.
2. Click **Add reply interval**.
3. Set a priority value for an email age and Click **Save**.

View, edit, and create Endpoints

Contents

Set up and work with Endpoints that correspond to the Designer application Endpoints which determine how work items are distributed.

Related documentation:

-

A Designer Endpoint corresponds with the Designer application to which work items will be distributed. The Designer application:

- Determines how this work item is matched with the employee.
- Can add any information that needs to be attached if further information needs to be retrieved prior to sending the work item to the employee. (Genesys recommends that the majority of the information for the employee is attached by the Designer application.)
- Determines how to distribute the work item.

> **Important**
> Configuration of tenants to which Endpoints belong, and of all routing to Endpoints, takes place in Designer.

View, edit, and create Endpoints

Link to video

Watch this video to learn how to view, edit, and create Endpoints.

From the **Configuration** tab:

1. Select the **Endpoint** tool from the left toolbar.
2. Select a **Category** to display or edit its Endpoint details.
3. To create a new Endpoint click **Add endpoint**....

Field descriptions

The **Limit** field is the limit for the number of unassigned/incomplete interactions that IWD creates for routing. IWD tracks the number of such interactions by subscribing and monitoring the Interaction Server events for each Interaction Queue associated with the Endpoint. If the limit is reached, IWD will not create any more interactions until some interaction is assigned to an employee, stopped or placed into the final queue (defined by the **Final queue** option, which is for use by Genesys

Professional Services/Customer Care only).

The **Segment By** field displays an attribute by which work items reaching this Endpoint can be segmented. To make changes to this value, either select from the displayed list or manually enter a different attribute.

The **User Data** field displays key/value pairs that will be attached to the user data of work items when they are classified and targeted at this Endpoint. You can delete existing key/value pairs and add additional ones here.

The **Configuration** panel displays read-only details of the business name of the Designer application, along with the specific Designer application streams associated with this Designer Endpoint. You can read more about Designer Application streams here.

The **Categories using endpoint** table displays the list of categories which are utilizing the current endpoint.

View, edit, and create Genesys Multicloud CX Email boxes

Contents

- 
- 

- Administrator
- Developer

Display and change details of all Genesys Multicloud CX Email boxes ("mailboxes") and add new ones.

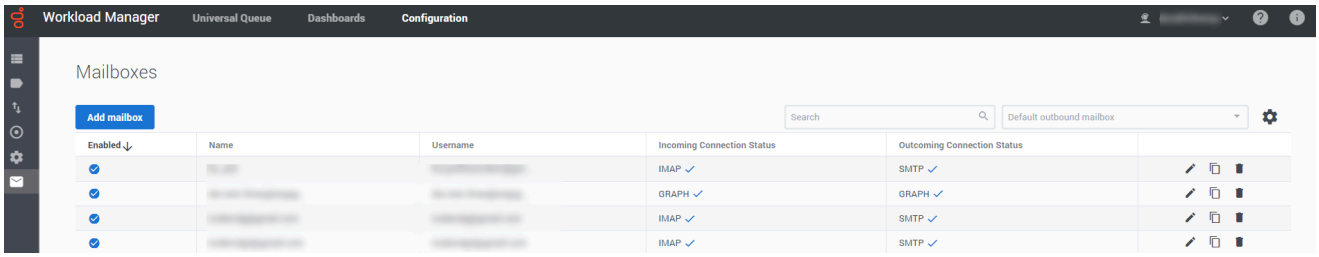
Related documentation:

-

Before you start

- Workload Manager displays the **Mailboxes** page only if Genesys has provisioned the relevant email service.
- You can add up to 100 mailboxes per tenant.
- Access privileges control access to this feature.
- You can configure and store auto-acknowledgement emails in a Standard Response Library (SRL). To do this, you need either eServices Manager or Designer, depending on your implementation.
- Readability of the High Priority/Importance email mark depends on the email client in use. Please note the following:
  - For email sent via Outlook to either Microsoft or Google mailboxes, this mark can be read by Email for Multicloud CX.
  - For email sent via Google to Google mailboxes, this mark can be read by Email for Multicloud CX.
  - For email sent via Google to Microsoft mailboxes, this mark **CANNOT** be read by Email for Multicloud CX.
    So, when a customer has Microsoft mailboxes, the High Priority/Importance mark is unreliable.
- You must perform the instructions specified in Prepare for Office 365 integration before configuring your Office 365 mailbox.

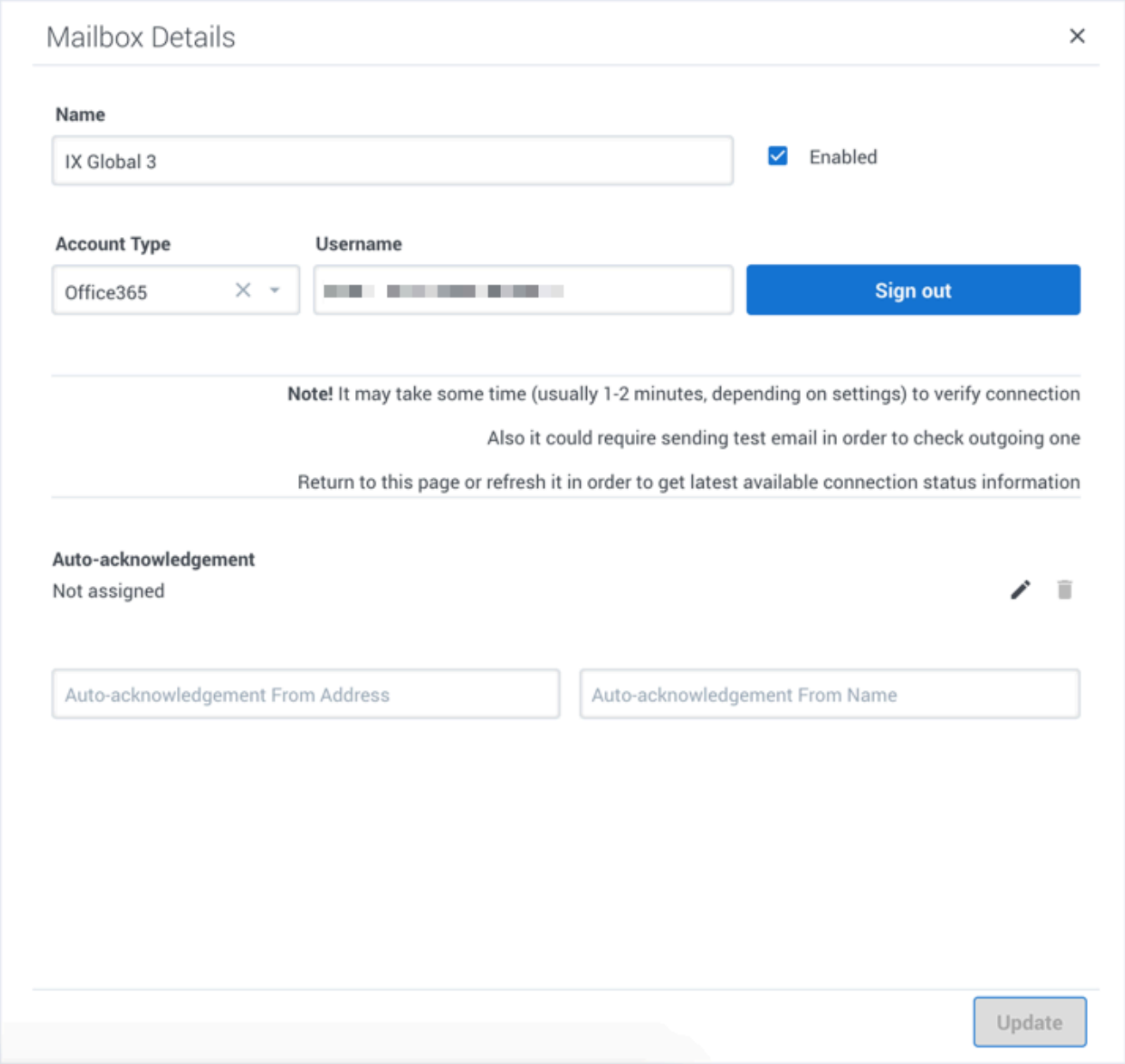
View all mailboxes



In the **Configuration** tab of Workload Manager, click the email tool in the left-hand toolbar to display all configured mailboxes. From this summary screen you can:

- Enable/disable all mailboxes.
- Search the list of mailboxes.
- Edit, copy and delete mailboxes.
- View incoming and outgoing connection statuses.
- Add a new mailbox.
- Set the default outbound mailbox via the **Default outbound mailbox** option. This mailbox is used if the outbound email *From* address is not specified or does not match any mailboxes.

View or edit a Gmail or Office365 mailbox

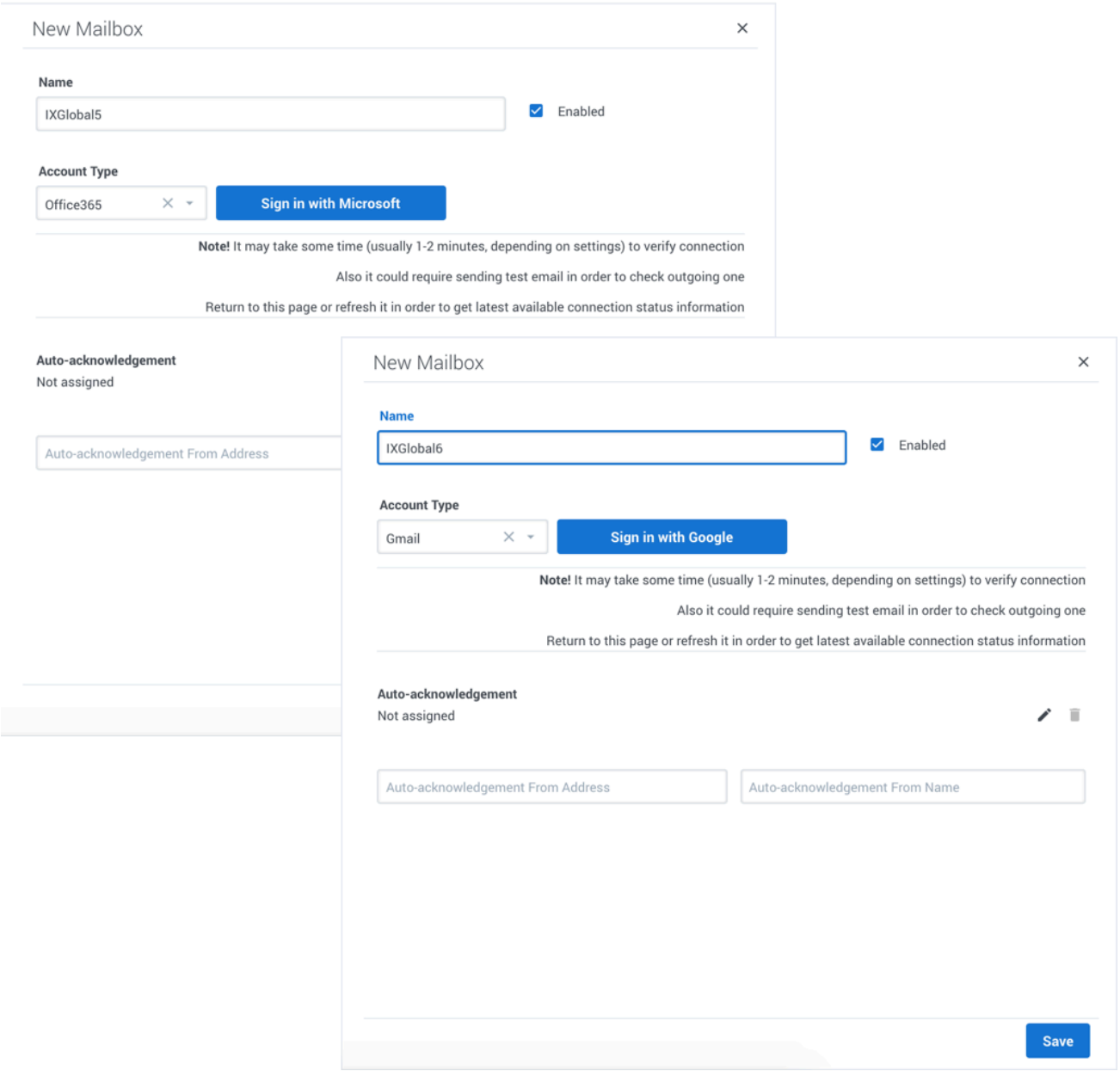


From the **Mailboxes** screen:

1. Click the mailbox (of type **Gmail** or **Office365**) you want to view or edit. A summary of the mailbox details appears (blank for a new mailbox).
2. Optionally, sign in to the mailbox.
3. View and/or edit the mailbox details.
4. Optionally, add an auto-acknowledgement email, and address and sender details.

5. Click **Update** to save any changes.
6. Optionally, sign out.

Add a Gmail or Office365 mailbox

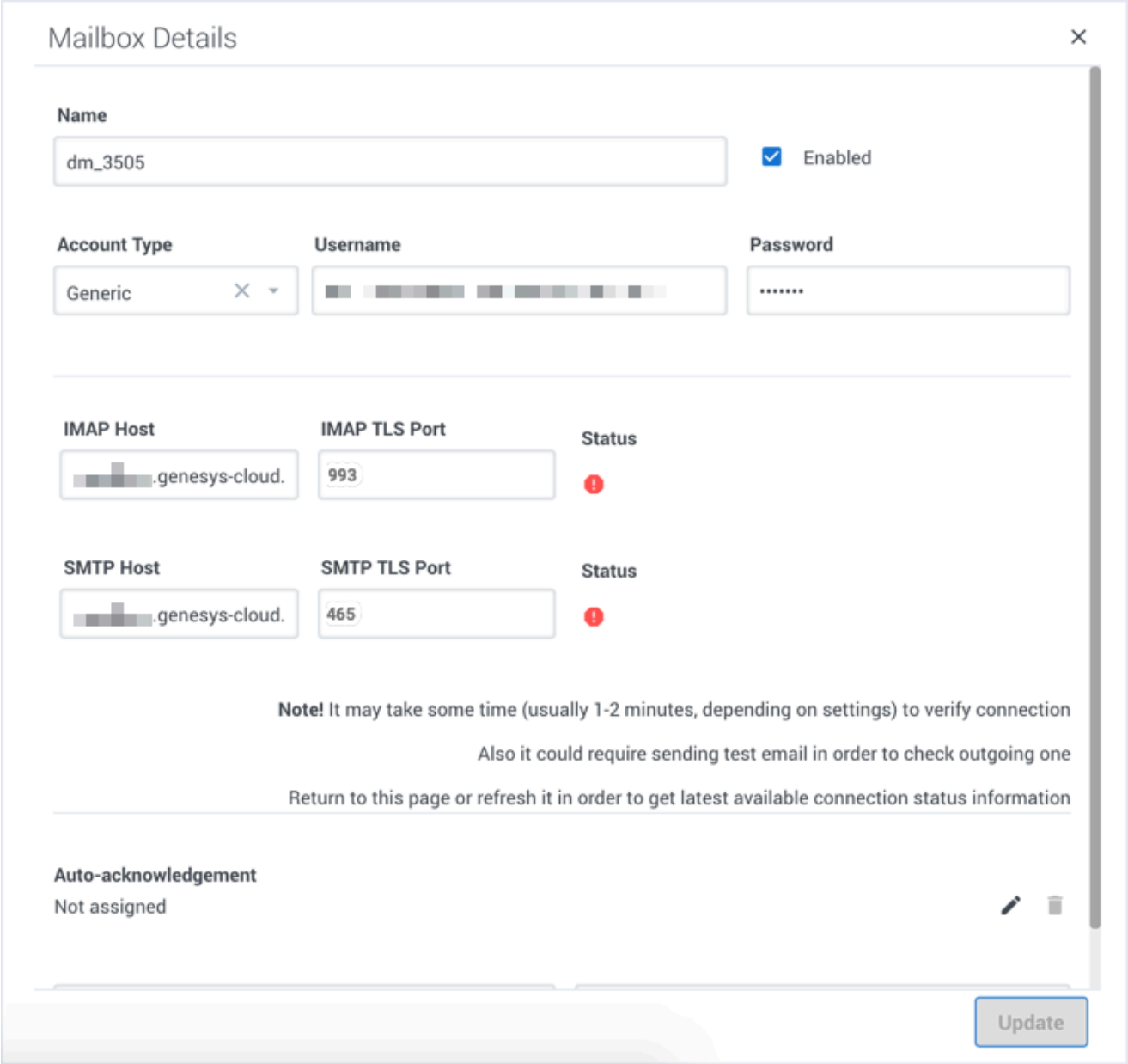


From the **Mailboxes** screen:

> **Important**
>
> To prevent any issues related to cached sign-in, see the guidelines in the Best Practices section.

1. Click **Add Mailbox**.
2. In the **Account Type** drop-down menu, select **Gmail** for a Gmail account, or **Office365** for an Office365 account.
3. In the **Name** field add the name of the new mailbox. At this stage you can save the new mailbox without any further changes or signing in.
4. Optionally, sign in, by clicking the relevant **Sign in with...** button.
5. Follow any authentication prompts that may be displayed. Once you are successfully signed in, your new mailbox is automatically saved, and you can edit its details.
6. Optionally, add an auto-acknowledgement email, and address and sender details.
7. Click **Update** to save any changes.
8. Optionally, sign out.

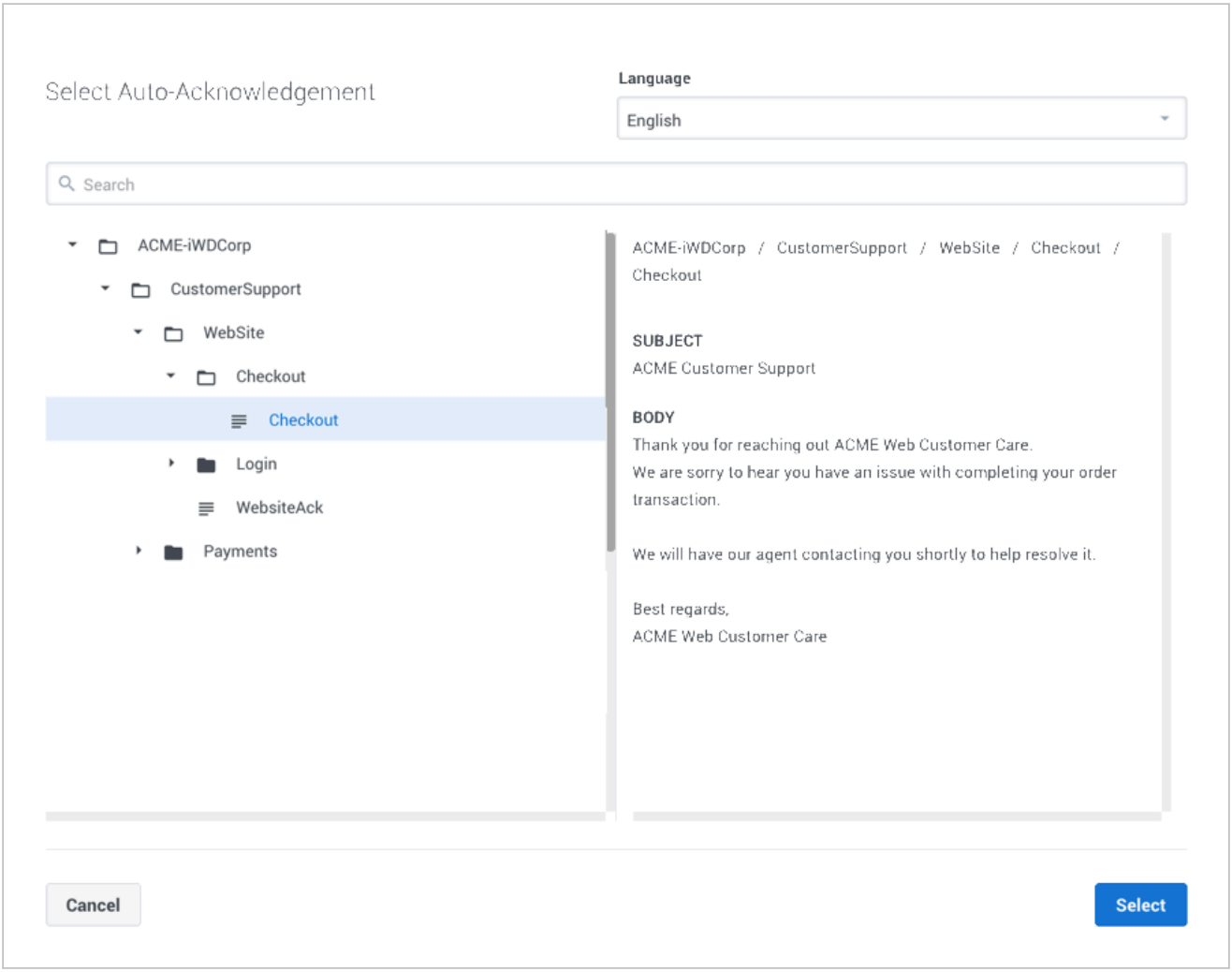
View, edit, or add generic mailbox



From the **Mailboxes** screen:

1. Click the mailbox (of type **Generic**) you want to view or edit, or click **Add Mailbox** to create a new one.
2. A summary of the mailbox details appears (blank for a new mailbox).
3. Select **Generic** for the **Account Type**.
4. Complete or edit the details for the mailbox using the field descriptions on this page.
5. Click **Update** to save changes.

Set up auto-acknowledgement emails



There are two ways to configure auto-acknowledgement emails:

- At the Mailbox level, using the auto-acknowledgement feature.
- At the IWD Category level.

Note: If auto-acknowledgements are configured at the mailbox level, configurations at the IWD Category level are ignored.

To select or change an auto-acknowledgement email:

1. Click the pencil icon to the right of the **Auto-acknowledgement** field. This displays the Standard Response Library (SRL) category tree.

2. Navigate the tree, select an item and click it. Note that SRL contents must not have field codes configured.

Field descriptions

Field	Description/Comments
Name	Business name of the mailbox.
Enabled/Disabled	Check to enable/disable this mailbox.
Username	Email address of the mailbox. Mandatory.
Password	Password for this username. Mandatory (mailbox of type Generic).
Account Type	Generic, Gmail, Office365.
IMAP Host	Hostname or IP address where the IMAP mailbox is hosted (mailbox of type Generic).
IMAP TLS Port	TLS Port number for the IMAP mailbox (mailbox of type Generic).
SMTP Host	Hostname or IP address where the SMTP mailbox is hosted (mailbox of type Generic).
SMTP TLS Port	TLS Port number for the SMTP mailbox (mailbox of type Generic).
Status	The mailbox connection status: OK. No status information available. Connection not opened, or invalid user name/password. **Important** Engage cloud Email sends a notification regarding the mailbox status if an error occurs and a webhook has been configured to report the mailboxError event.
Auto-acknowledgment	Pathname and name of the auto-acknowledgment text assigned to this mailbox, or Not Assigned.
Auto-acknowledgment From Address	'From' address of the outgoing auto-acknowledgment email.
Auto-acknowledgement From Name	The sender name to use in the outgoing auto-acknowledgment email.

Handling unparsable emails

If an unrecoverable email error is identified when processing an email, the system marks the email as read and skips it. The email will not be processed during the next cycle.

If a recoverable email error is found, the system keeps the email unread and attempts to process it

during the next cycle.

Language detection

The language of an email conversation is automatically detected and set based on the subject and body of the email.

> **Important**
> Currently, Workload Manager concatenates subject and message body to detect language of the resulting string. When the subject and body are written in different languages, for example, subject in English and body in Russian, language detection of the concatenated string may not work as expected.

The following work item attribute is available:

- **detectedLanguage** – A two-letter ISO language code matching the email language such as *en*, *fr*, and *es*.

Additionally, the **Header_Content-Language** attribute is available for the corresponding email header.

Supported languages

ISO language name	Language code
Albanian	sq
Arabic	ar
Azeri	az
Bengali	bn
Bulgarian	bg
Croatian	hr
Czech	cs
Danish	da
Dutch	nl
English	en
Estonian	et
Farsi	fa
Finnish	fi
French	fr
German	de

ISO language name	Language code
Hausa	ha
Hindi	hi
Hungarian	hu
Icelandic	is
Indonesian	id
Italian	it
Kazakh	kk
Kyrgyz	ky
Latin	la
Latvian	lv
Lithuanian	lt
Macedonian	mk
Mongolian	mn
Nepali	ne
Norwegian	no
Pashto	ps
Polish	pl
Portuguese	pt
Romanian	ro
Russian	ru
Serbian	sr
Slovak	sk
Slovene	sl
Somali	so
Spanish	es
Swahili	sw
Swedish	sv
Tagalog	tl
Turkish	tr
Ukrainian	uk
Urdu	ur
Uzbek	uz
Vietnamese	vi
Welsh	cy

Attachments

Supported attachment types

Administrators can configure which attachment types are supported in outbound emails by

Allowed file types in outbound emails

- Images — jpg, jpeg, png, gif, tif, bmp, heic
- Documents — pdf, docx, xlsx, pptx, doc, xls, ppt
- Audio — aac, m4a, amr, mp3, ogg, oga, opus
- Video — mp4, 3gpp
- Other — zip

Attachment size limitations

Best practices for signing in to mailboxes

When you are signing in to Gmail or Office365 accounts, you must ensure that any previously cached sign-in data is cleared from your browser. It is possible that the cached sign-in data from the browser is reused when you attempt to create mailboxes in Genesys Multicloud CX Email. As a result, you might be signing in to a different mailbox account than the required account, leading to all unread emails from the incorrect mailbox account (for example, your department mailbox) entering the system.

Follow one of these guidelines to avoid the above situation:

- Use a private or Incognito browser window to sign in to a Gmail or Office365 account. When you are finished with creating a mailbox and you are required to create another one, close the current private browser window and open a separate private window to proceed with the next account.
- Sign in to a cached email account and sign out of the account using a separate browser window to clear the cache. After you clear the cache, proceed with your mailbox sign-in. This does not require you to use a private browser window.

Best practices for mailbox maintenance

Most email providers process emails in the following way:

- An incoming email is marked as read and submitted to IWD for processing but remains within the mailbox.
- When an outbound email is sent, a copy is usually stored in the Sent folder.

Over a period of time, these processed emails require an increasing amount of space, which could exceed the configured limit supported by your email provider. When a mailbox reaches the configured limit, IWD cannot receive or send further emails. To address this, Genesys recommends regular maintenance of these emails, including the following:

- Perform and enforce a regular mailbox clean up schedule within your organization for all mailboxes configured with Genesys Email. It can be either manual or automatic by using various tools.
- Archive old emails safely for future reference. Don’t forget the Sent and Drafts folders!
- Delete unwanted emails.
- Empty the Trash and Spam folders.

Use Workload Manager

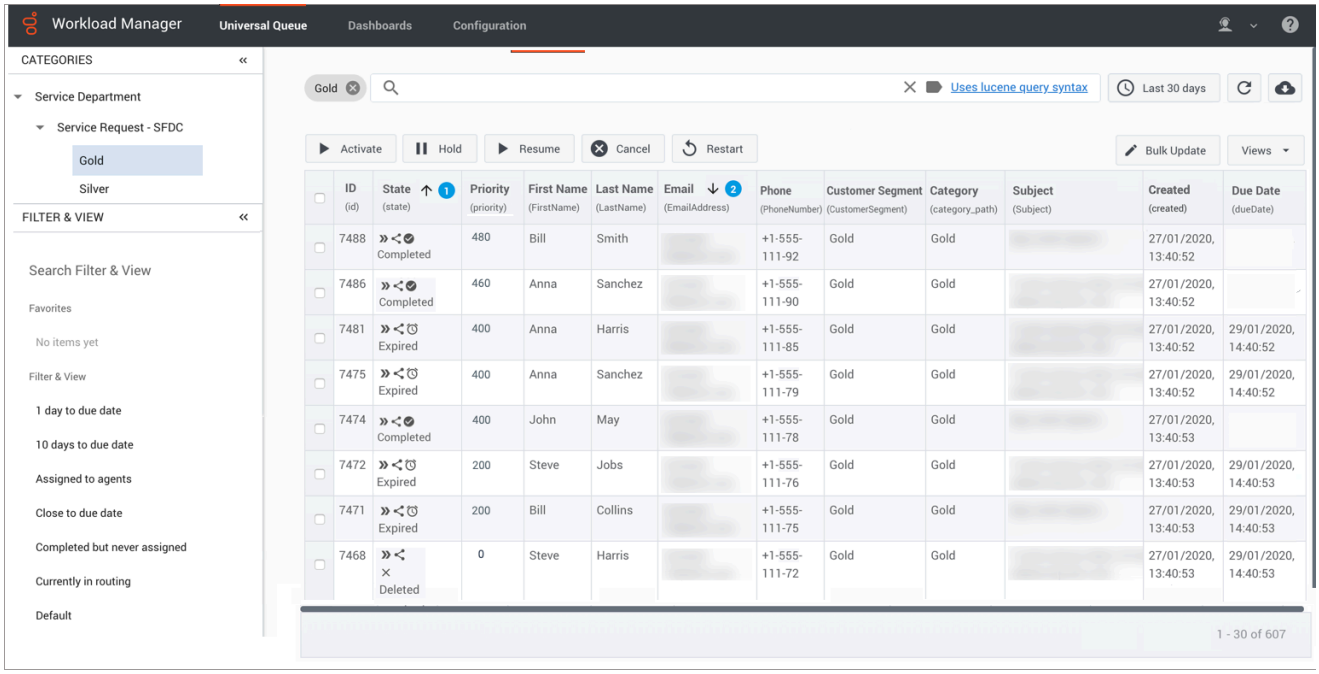
Contents

Learn the layout and controls of Workload Manager's universal work item queue on the **Universal Queue** tab.

Related documentation:

-

Universal Queue display



Important

You can only view and/or use features and functions in Workload Manager if you have the appropriate roles and privileges assigned to you. On-screen features that are grayed out are not available. Contact your administrator to update your privileges.

Search, display, manage, and update work items

Contents

Quickly filter, find, display, manage the status of, or update the content attributes of work items, emails and leads ("work items") either individually or in bulk.

Related documentation:

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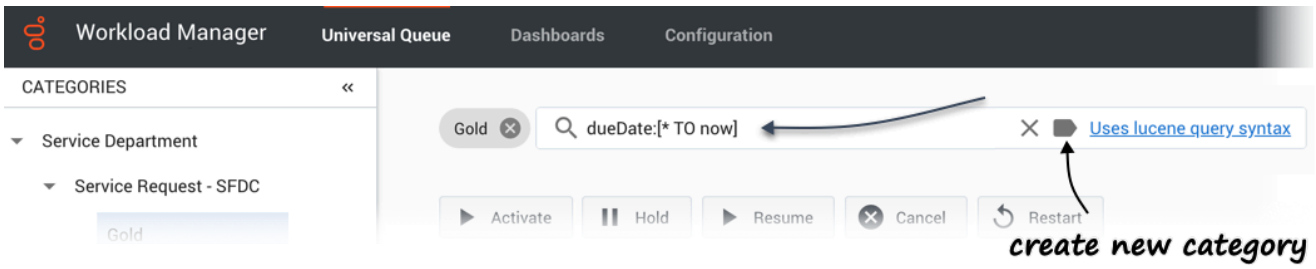
Overview of search and filter functions

Link to video

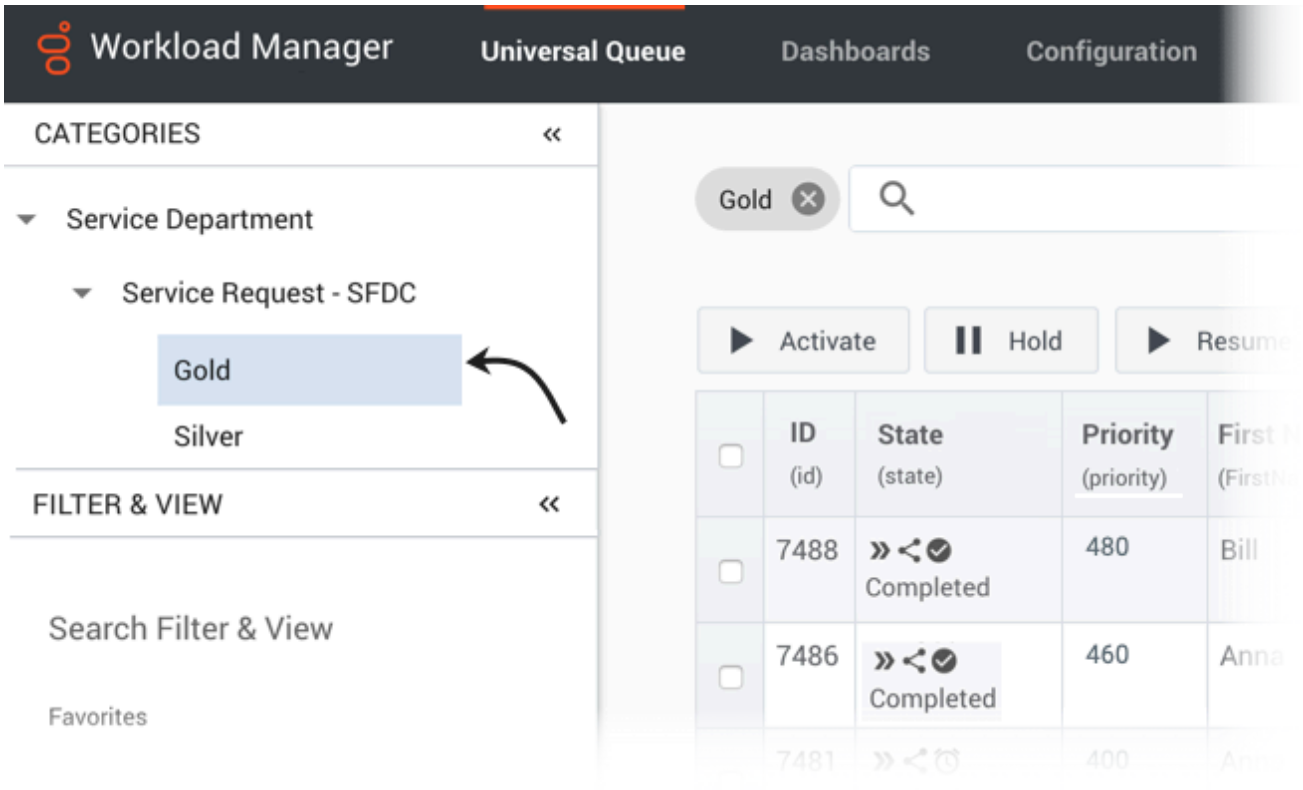
You can use quick filters, filter by categories, create custom filters, and search for work items in the **Universal Queue** window.

Search for work items



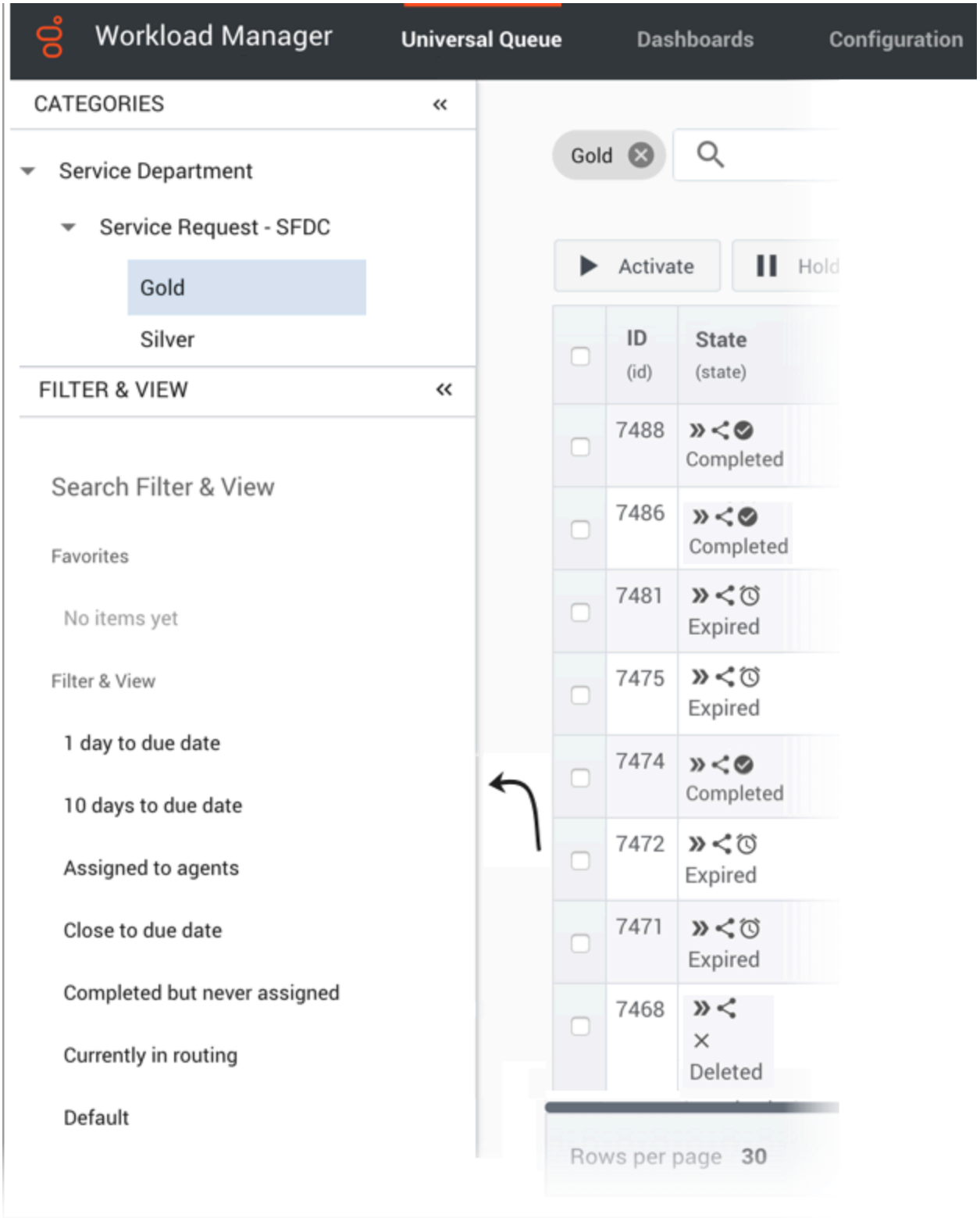
- Search for a **specific work item** by entering its ID in the **Search** field at the top of the **Universal Queue** tab and clicking return.
- Search for any **list of work items** by entering a text string in the **Search** field and clicking return.
  - Search the **work items database** directly by using the Lucene query syntax described in the Lucene query syntax document.
  - Clear the current search citeria by clicking **X** in the **Search** field.
  - Create a new Category from the current search criteria by clicking the new Category button in the **Search** field.

Filter by Category



Select a Category on the collapsible **Categories** tab to quickly filter by work items that match the selected Category or sub-Category only.

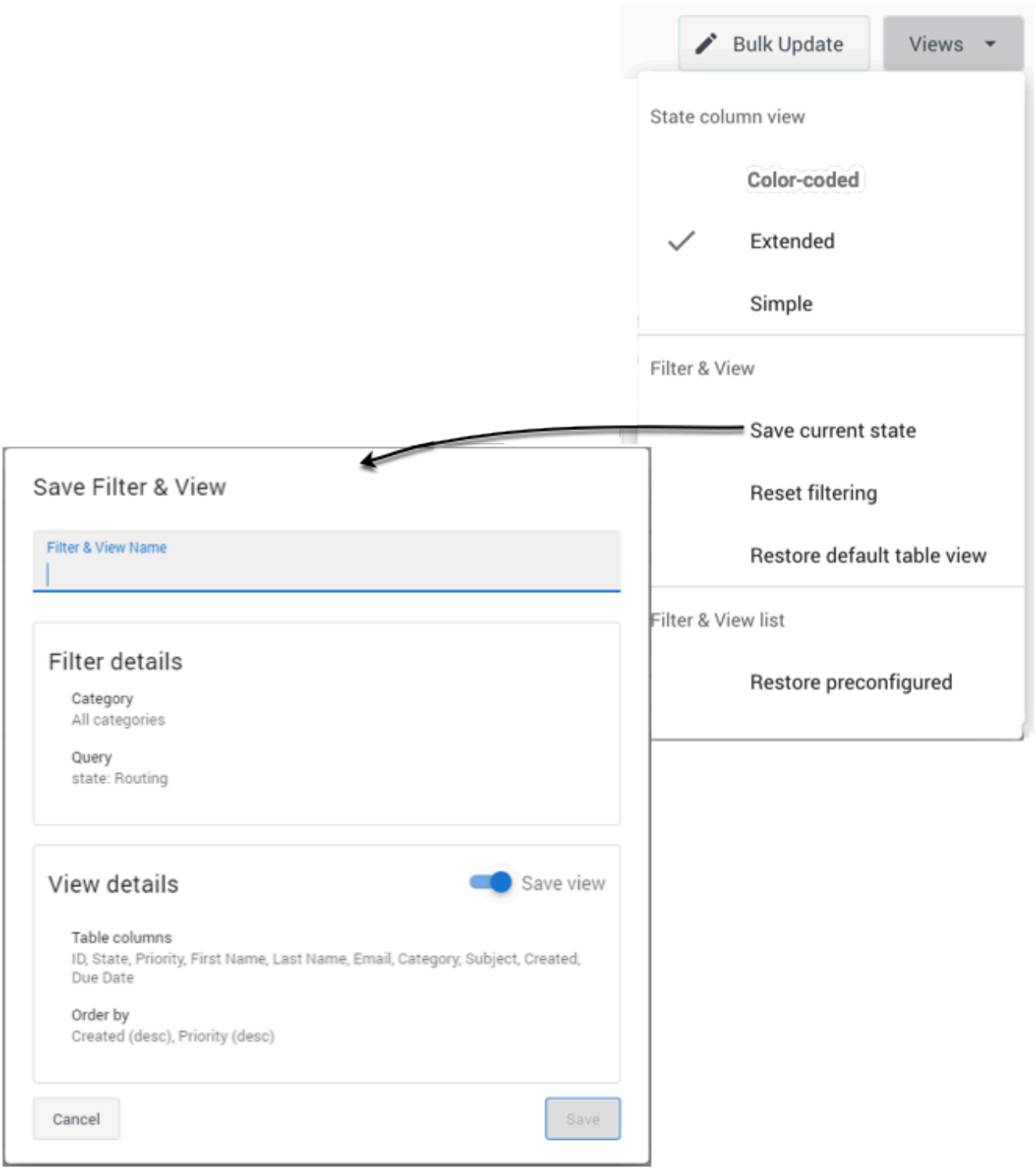
Using the Filter & View tab



Use a saved or favorited filter/view on the collapsible **Filter & View** tab to

quickly apply filtering and view settings to work items list. If you have previously selected a Category, any Category defined inside the filter/view overrides the earlier Category selection. If you select **All Categories** inside the filter/view, any previous selection of Category is cleared.

Save filters and views



Use the **Views** button to do the following:

- Select a view for the **State** column.
- Save/reset filters (Category + query) and views (columns + sorting):
  - Save the current filter and/or view for future use (subject to privileges).
  - Reset the filter to clear the filtering details from the page.
  - Reset the table view to the default.
- Restore the list of preconfigured filter and view states.

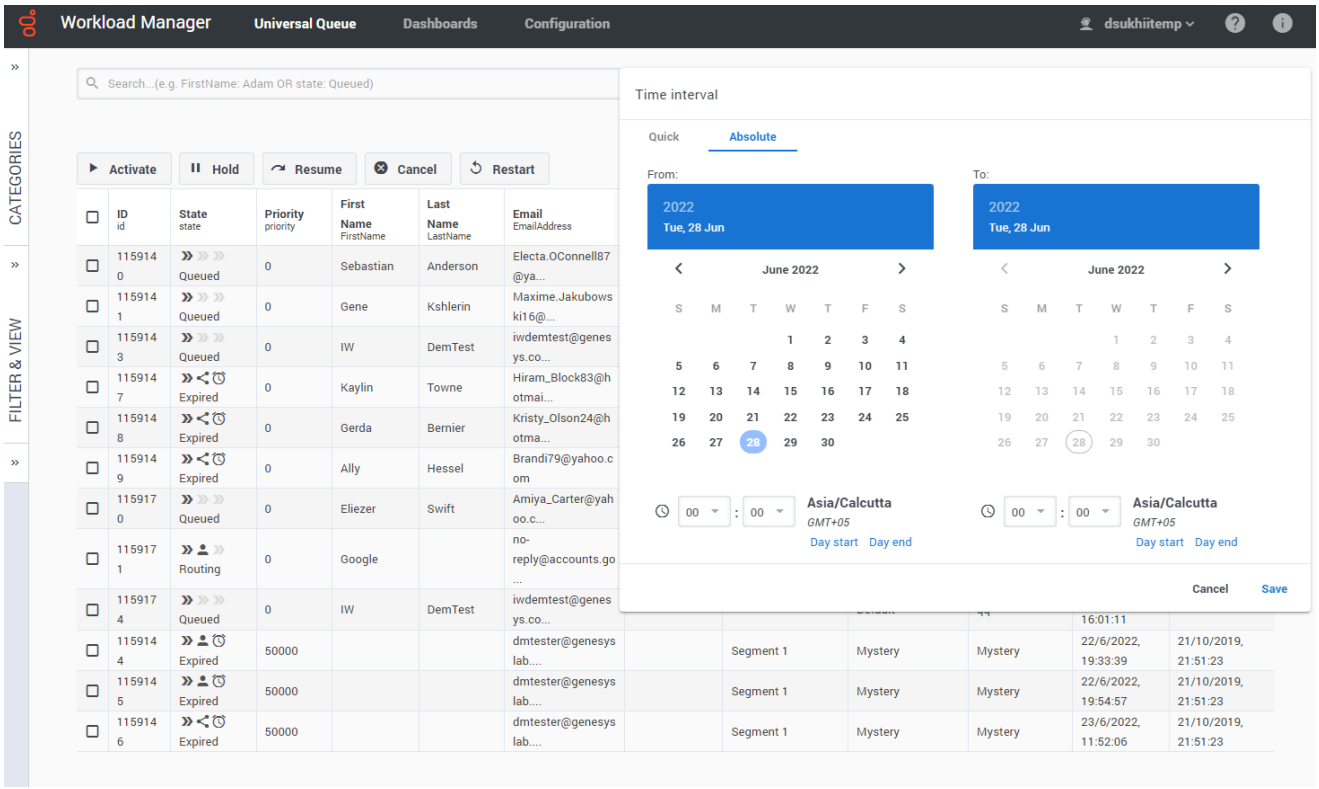
Extended states

The workitem's state is displayed in an extended **State** column in Workload Manager. The table below describes the meaning of the symbols.

Extended	Colored	Description
		New
		Not yet distributed
		Classified
		Queued
		Held
		In routing state, not yet assigned
		Being processed by an agent
		Completed with agent involvement
		Expired (reached its due date) with agent involvement
		Completed without agent involvement
		Expired (reached its due date) without agent involvement
		Workitem has been deleted

Extended	Colored	Description
	Error	Workitem has an error

Search by time interval



Use the **Select time interval** button (which shows the currently selected time interval) to display either:

- Quick search using predefined time ranges such as *This week*, *Yesterday*, *Last 15 min*, *Last 7 days*, and so on.
- Absolute date/time ranges for customized time intervals.
  1. Select a **From** date and time using the date calendar and time drop-down field (*hh:mm* format). You can use the **Day start** and **Day end** selectors to select the day start and end times configured for your contact center. A time zone indicator is available to help you with time selection.
  2. Select a **To** date and time using the date calendar and time drop-down field (*hh:mm* format). You can use the **Day start** and **Day end** selectors to select the day start and end times configured for your contact center. A time zone indicator is available to help you with time selection.
  3. Click **Save** to apply the filter.

Display and update work item attributes

Link to video

For individual work items

Select a work item and/or click one of its attributes to display all its attributes.

Toggle the display of specific fields in the summary display by clicking the symbols indicated.

To update the attribute values of a work item, click the value you want to change, add the new value, then click the **Update** button. System properties of the work item are protected, so you can't update them.

Add an attribute to the display by clicking **Add attribute...** at the bottom of the first panel of attributes.

Search for other work items corresponding to a specific attribute value by clicking on the search symbol next to the attribute.

For multiple work items

To make an identical value change to one or more attributes of multiple work items:

1. Select the work items by checking their checkboxes or by filtering them using a search query
2. Click the value you want to change.
3. Add the new value(s).
4. Click the **Bulk Update** button.

System properties of the work item are protected, so you can't update them.

Delete attachments from emails

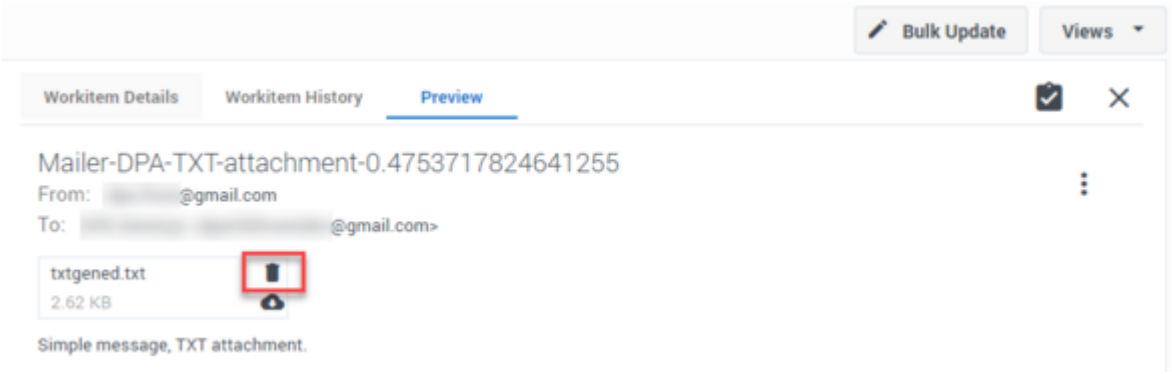
Supervisors can delete one or more attachments from emails.

The Delete feature must be enabled using the option **enableDeleteAttachments** : *True* in Workload Manager's **interaction-workspace** section.

To delete an attachment from an email:

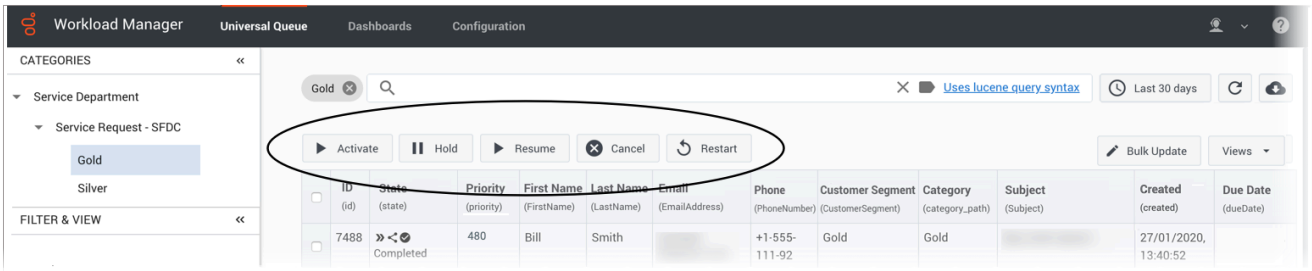
1. Select an email by clicking on the item. The **Workitem Details** tab displays the email properties.
2. Click **Preview**. A preview of the email is shown along with any attachments the email contains in the **Preview** tab.
3. Click the **Delete** icon displayed over the attachment that you want to delete.

> **Tip**
> You can download an attachment using the download icon and see whether the attachment must be deleted or not. For example, if the attachment contains any Personal Identifiable Information (PII), you can choose to remove it.



4. Click **Yes** on the confirmation window. The attachment is deleted from the email.

Manage work items



Use the control buttons at the top of the **Universal Queue** window to do the following to either individual or multiple work items:

- Activate work item(s)—Select a work item(s) that has been assigned an activation date in the future, and click **Activate** to activate it immediately.
- Hold work item(s)—Select a work item(s) and click **Hold**. Held work items can't be reprioritized or distributed, but you can cancel, restart or resume them.

- Resume work item(s)—Select a held work item(s) and click **Resume** to resume processing. You can only resume held work items.
- Cancel work item(s)—Select a work item(s) and click **Cancel** to permanently cancel it. You can't cancel a work item if it's been completed, canceled, or rejected. But you can cancel a work item that has already been assigned to an agent. Canceled work items remain in IWD for a configurable (by Genesys)

amount of time before being deleted. Work items can only be completed through the source system or the API, so Genesys recommends canceling any workitems that you no longer want matched with an employee.

- Restart work item(s)—Select a work item(s) to send it back to the beginning of the process, where it will be treated as if it was new.

Any action can be applied to one or many individually selected items (checked in the table) or to all the items that satisfy the current query, including time frame and any applied Category filter.

Use the **Rows per page** counter at the bottom left to choose to display either 30, 50, 80 or 100 items per page.

Work items that are in the **Default** category have not been segmented by any of the existing Categories. Genesys recommend that administrators monitor these work items to decide whether a category should be established to segment them.

Transfer of work items to Universal Queue

After a work item is assigned to an agent, the work item can be transferred back to the Universal Queue during the following scenarios:

- Agents can transfer work items or emails back to the Universal Queue for re-classification from within the Agent Workspace if the agent identifies that the work item is categorized incorrectly.
- IWD can be configured to automatically pull work items or emails from agents' workbins if these items are not processed within the configured time. IWD subsequently sends these items to available agents again.

Monitor work items and emails

Contents

Describes the six different work item and email dashboards on the Workload Manager **Dashboards** tab.

Related documentation:

-

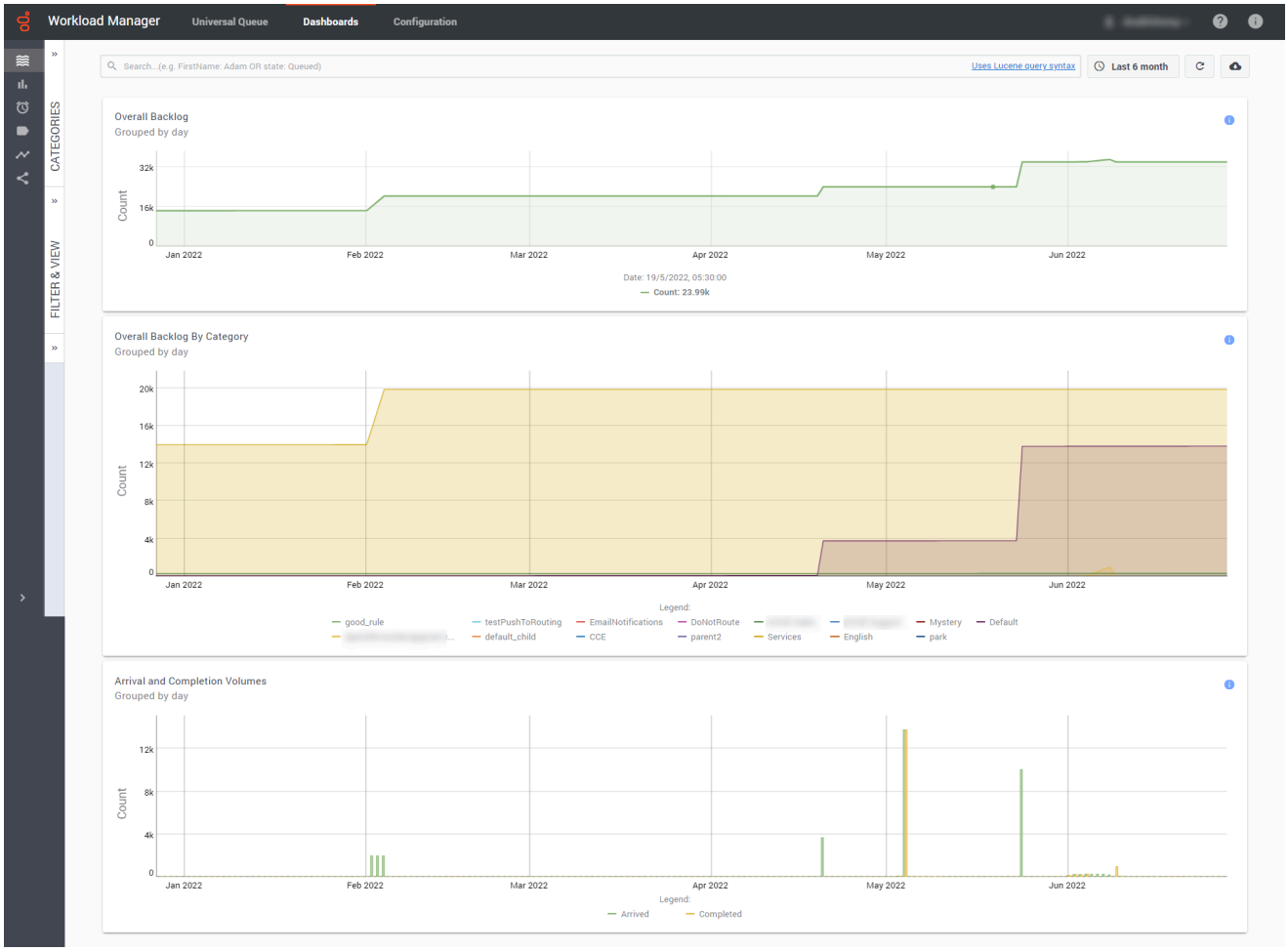
The **Dashboards** tab in Workload Manager gives you several options for displaying dashboards for monitoring the state of work items and emails (hereafter, "work items") controlled by IWD:

- By backlog
- By volume
- By Service Level Agreement
- By categories
- By timing
- By path

Important

- All the displays reflect the currently selected time frame, the selected Category and Query.
- Where very large numbers of work items are displayed, scientific notation is used on the axes of display graphs.

By backlog



Provides a high-level intraday summary of the backlog for the period chosen. This summary is the starting point for analysis, enabling you to spot trends in KPI and potential bottlenecks in work items. For example, it can quickly show you that the backlog is growing or shrinking. It displays dynamically the overall backlog, the backlog by category, and arrival and completion volumes.

You can:

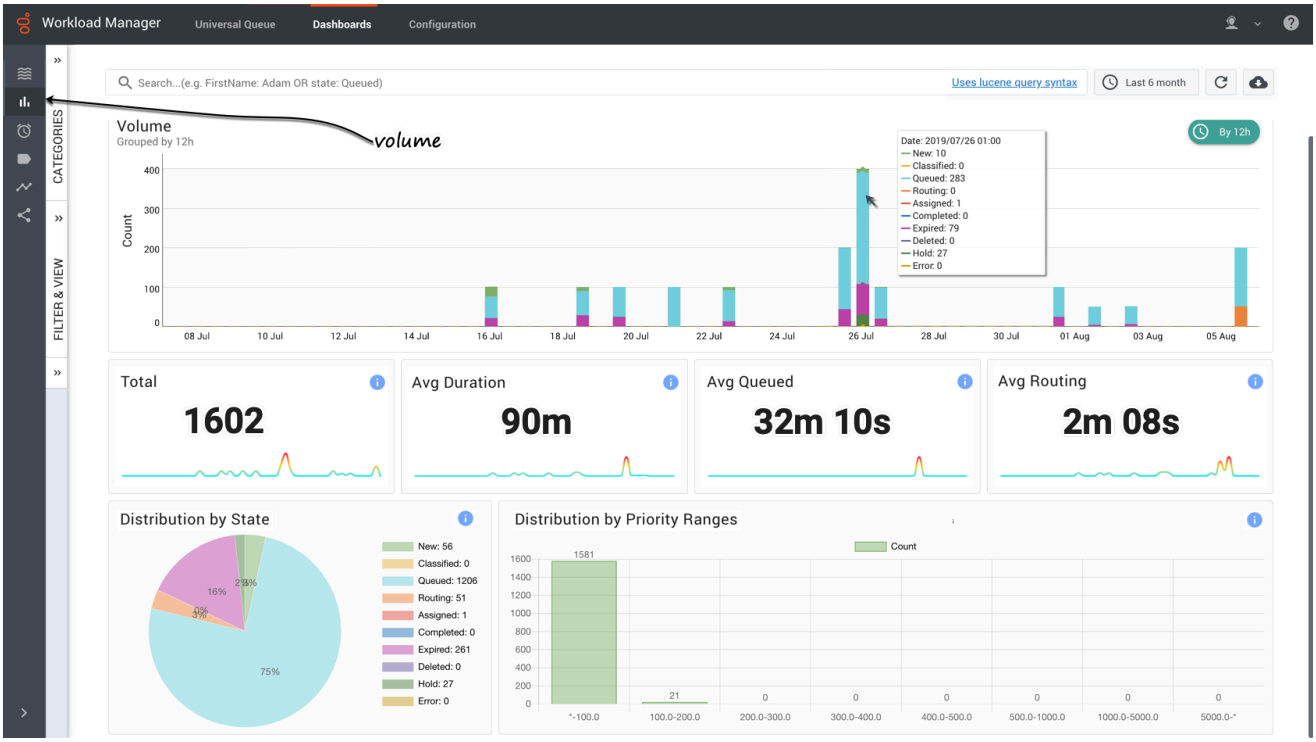
- Dynamically change the time interval and category for display.
- Dynamically select a saved search filter from the **Filter & View** tab for display.
- Hover over populated areas of the graph to display a detail panel for the date and time selected.
- Use your cursor to drag a box to select a range of columns and drill down to a lower level of detail.
- Use the legend to further understand the data in each graph. For example, the legend for **Overall Backlog By Category** indicates the backlog pertaining to work items in each category.

Metric descriptions

- **Overall backlog**—The overall number of work items.
- **Overall Backlog By Category**—The number of work items in distribution by category.

- **Arrival and Completion Volumes**—The amount of arrived and completed work items in a time range.

By volume



Displays dynamic histogram and summary totals (total, average duration, average time in queue, average time in routing) for the selected time interval and category, and distributions by state (pie chart) and priority ranges (bar chart). You can:

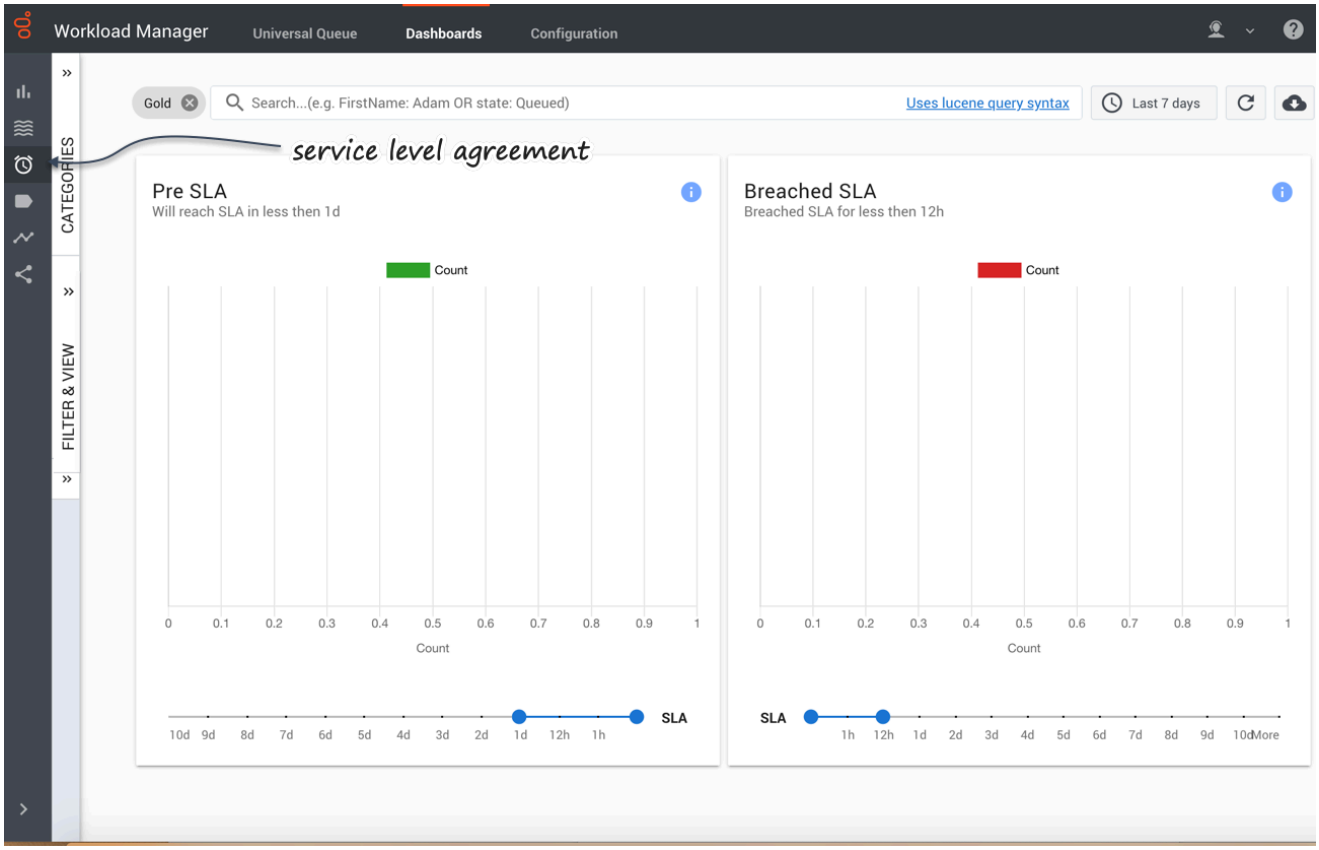
- Dynamically change the time interval and category for display.
- Dynamically select a saved search filter from the **Filter & View** tab for display.
- Hover over points in any graph to display a detail panel for the selected data point.
- Use your cursor to drag a box to select a range of columns and drill down to a lower level of detail.

Metric descriptions

- **Volume graph**—The total number of new work items that were submitted to IWD in a time range.
- **Total**—The total number of new work items that were submitted to IWD during the reporting interval.
- **Average duration**—The average amount of time that elapsed before agents completed work items. This metric includes the time that work items were backlogged, as well as work time.
- **Average Queued**—The average amount of time a work item was waiting in the queue.
- **Average Routing**—The average amount of time a work item was waiting to be routed.

- **Distribution by state**—The distribution of work items by their state, in percent and quantity.
- **Distribution by priority ranges**—The number of work items that have different priorities.

By SLA



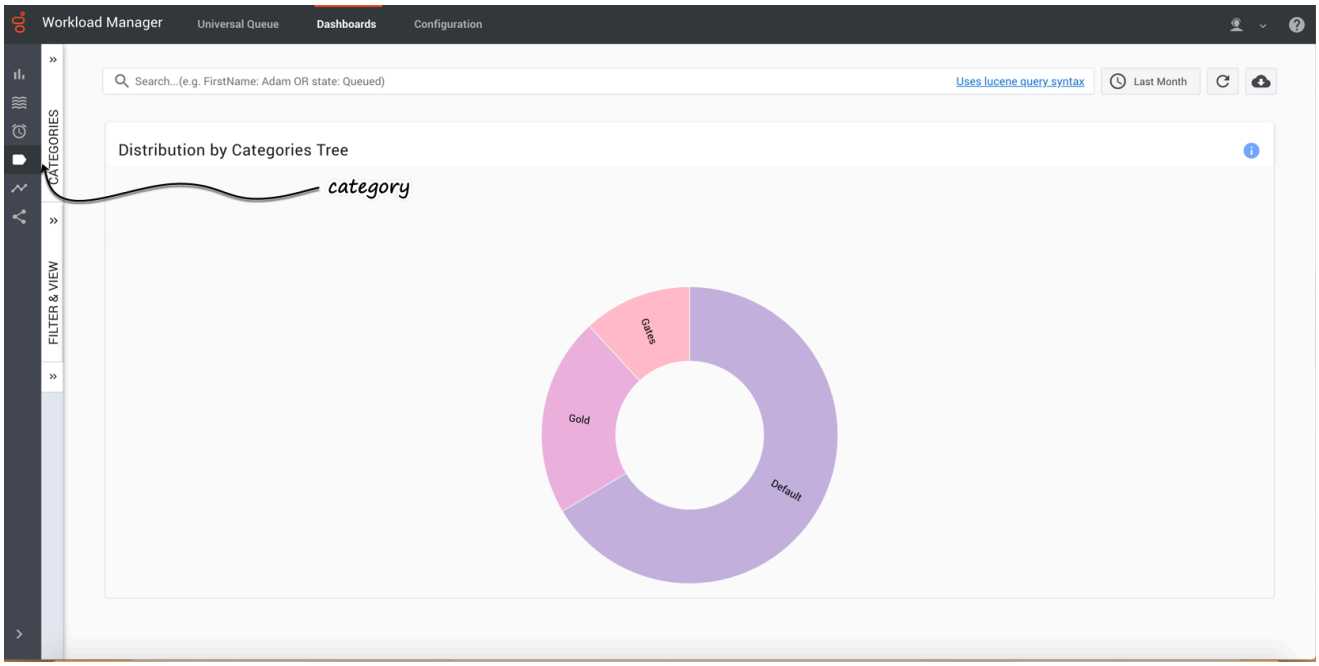
Displays dynamic work item counts for selected pre-SLA intervals, and for work items that have breached their SLA by selected intervals. You can:

- Dynamically change the time interval and category for display.
- Dynamically select a saved search filter from the **Filter & View** tab for display.
- Hover over populated areas of the graph to display a detail panel for the date and time selected.
- Use the sliders at the foot of the panels to change the time ranges.

Metric descriptions

- **Pre SLA item counts**—The number of work items that should be serviced in a selected time range.
- **Breached SLA item**—The amount of work items that should have been serviced but were not, in a selected time range.

By categories



Displays dynamically the distribution of work items across the available categories for the date and time selected. You can select current or historical time intervals for a rapid visual comparison.

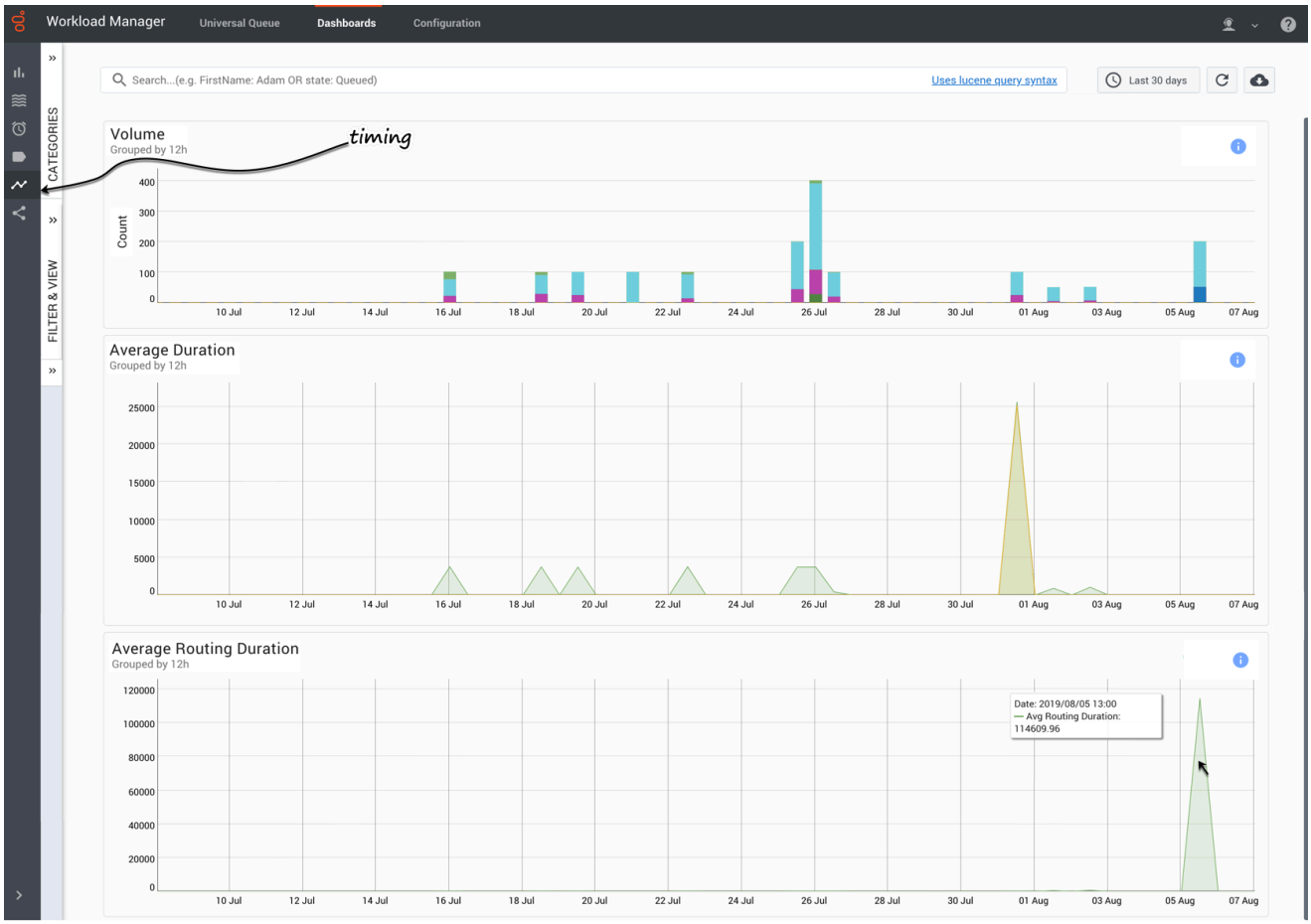
You can also dynamically select a predefined query for display.

Hover over a Category chart to display information about that Category.

Metric description

- **Distribution by categories**—Distribution of work items by categories.

By timing



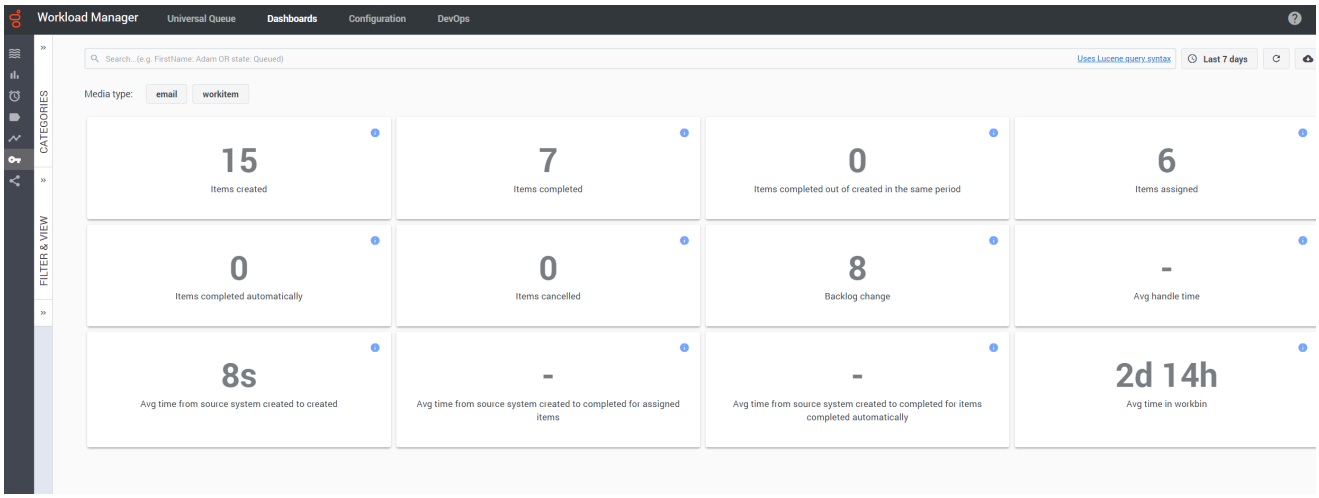
Displays dynamically the volume of transactions, plus average duration times and average routing duration times. You can:

- Dynamically change the time interval and category for display.
- Dynamically select a saved search filter from the **Filter & View** tab for display.
- Hover over populated areas of the graph to display a detail panel for the date and time selected.

Metric description

- **Volume**—Total number of received work items in a time frame.
- **Average Duration**—Average work item lifetime and time before work items become queued.
- **Average Routing Duration**—Average time that work items spent in routing before being routed to the agent.

By key metrics



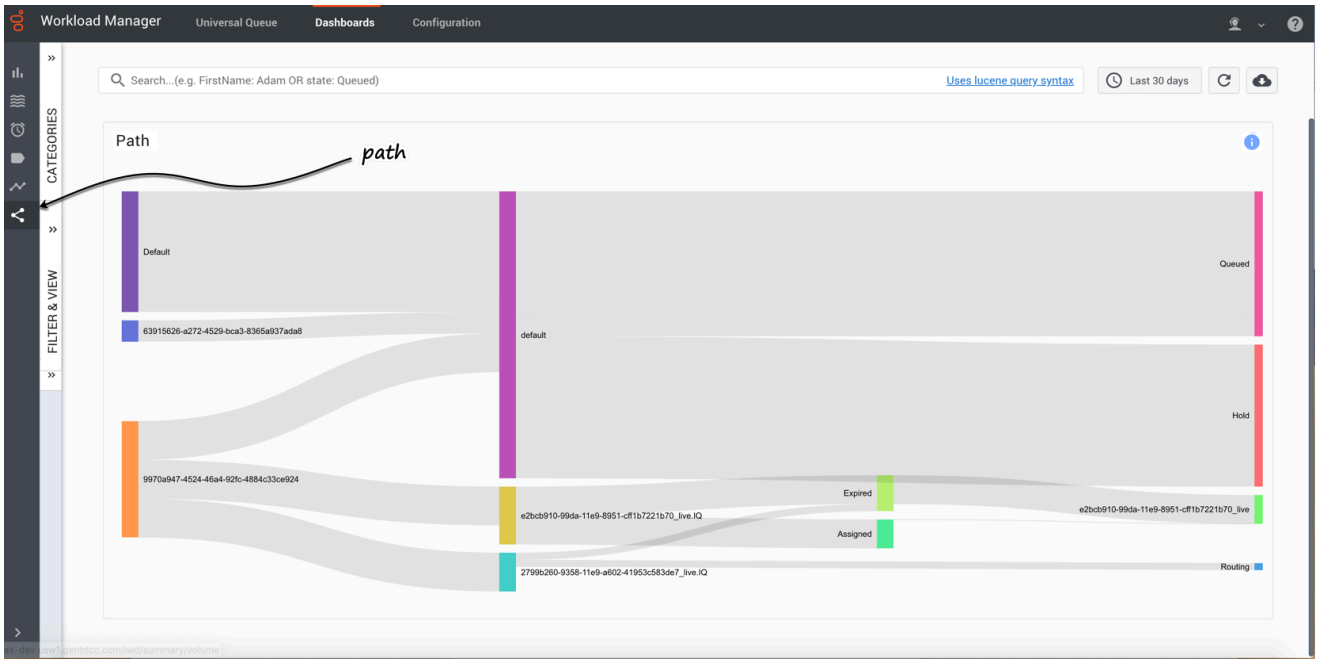
Displays dynamically the key metrics on work items and emails for the selected time interval. You can:

- Dynamically change the time interval using quick filters or Lucene query.
- Select the Media type as email, workitem, or both to filter the metrics.

Metric descriptions

- **Items created** —The number of tasks created by IWD during the reporting interval.
- **Items completed**— The number of tasks that were completed.
- **Items completed out of created in the same period**— The number of tasks that were completed out of the tasks created during the reporting interval.
- **Items assigned**—The number of items assigned to an agent for processing.
- **Items completed automatically**—The number of items completed without an agent involvement.
- **Items cancelled**—The number of items cancelled by an Administrator.
- **Backlog change**—The number of pending items (backlog) increased or decreased in the selected interval.
- **Avg handle time**— The average amount of time that agents worked on tasks before the tasks were completed.
- **Avg time from source system created to created**—The average amount of time taken from when an email or work item was received, and the corresponding task created in IWD.
- **Avg time from source system created to completed for assigned items**—The average amount of time taken by an agent to complete a task from when an email or work item was received in IWD.
- **Avg time from source system created to completed for items completed automatically**—The average amount of time taken to complete an item without an agent involvement from when an email or work item was received in IWD.
- **Avg time in workbin**—The average amount of time an item was put in a workbin.

By path



The **Path** dashboard enables you to see where the work item has been segmented, queued in Designer, and matched with an employee, through to completion. This dashboard is also useful for identifying work items that have not been segmented and have been matched through the default path.