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Intelligent Workload Distribution Administrator's Guide

[View, edit, and create Categories and Rules](#)

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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.

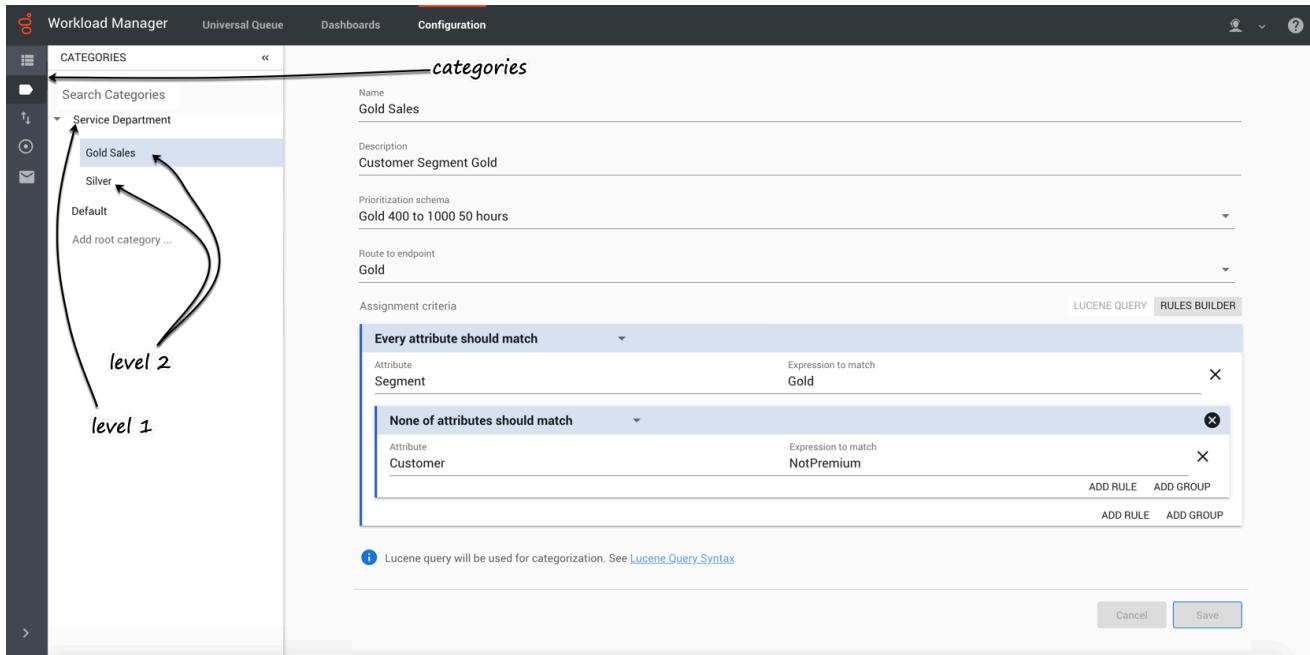
View and edit a Category

[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 screenshot shows the Workload Manager Configuration interface with the 'Categories' tab selected. On the left, a tree view shows a category structure: 'Service Department' (level 1) has 'Gold Sales' (level 2) and 'Silver' (level 2) as children. Hand-drawn arrows point from 'Service Department' to 'level 1' and from 'Gold Sales' to 'level 2'. On the right, the details for the 'Gold Sales' category are displayed. The 'Name' is 'Gold Sales' and the 'Description' is 'Customer Segment Gold'. The 'Prioritization schema' is 'Gold 400 to 1000 50 hours'. The 'Route to endpoint' is 'Gold'. The 'Assignment criteria' section is titled 'Every attribute should match' and contains a rule for 'Segment' with expression 'Gold'. Below it is a section titled 'None of attributes should match' with a rule for 'Customer' with expression 'NotPremium'. At the bottom, there are 'Cancel' and 'Save' buttons.

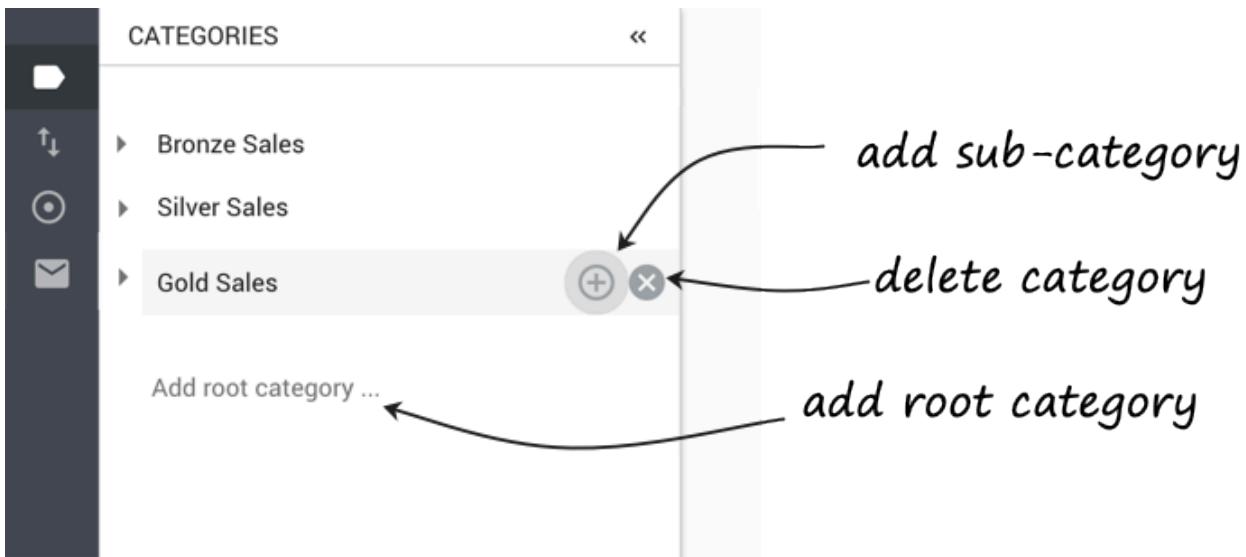
The first level of Category (**Service Department** in the screenshot above) translates to the Department in historical reporting (for example, here).

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:



Assignment criteria

LUCENE QUERY RULES BUILDER

Elasticsearch (Lucene) query

ⓘ Lucene query will be used for categorization. See [Lucene Query Syntax](#)

Cancel Save

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

Rules examples

Name
Customer Segment New Enrollment A

Description
Customer Segment = New Enrollment AND (value between 300 and 900) OR (productType = Residential)

Prioritization schema
Lead Management

Route to endpoint
Default

Assignment criteria

LUCENE QUERY
RULES BUILDER

Every attribute should match

Attribute customerSegment	Expression to match New Enrollment	X
------------------------------	---------------------------------------	---

Any one attribute should match

Attribute businessValue	Expression to match [300 to 900]	X
Attribute productType	Expression to match Residential	X

ADD RULE ADD GROUP

i Lucene query will be used for categorization. See [Lucene Query Syntax](#)

Cancel Save

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.

Name
Customer Segment New Enrollment B

Description
Customer Segment = New Enrollment and (productType <> Residential AND productType <> Business)

Prioritization schema
Lead Management

Route to endpoint
Default

Assignment criteria

LUCENE QUERY
RULES BUILDER

Every attribute should match

Attribute customerSegment	Expression to match New Enrollment	X
------------------------------	---------------------------------------	---

None of attributes should match

Attribute productType	Expression to match Residential	X
Attribute productType	Expression to match Business	X

[ADD RULE](#) [ADD GROUP](#)

[ADD RULE](#) [ADD GROUP](#)

i Lucene query will be used for categorization. See [Lucene Query Syntax](#)

Cancel Save

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

Name
Customer Segment New Enrollment C

Description
Customer Segment = New Enrollment and business value between 100 and 700 and product type = Residential

Prioritization schema
Lead Management

Route to endpoint
Default

Assignment criteria

LUCENE QUERY
RULES BUILDER

Every attribute should match		
Attribute customerSegment	Expression to match New Enrollment	X
Attribute businessValue	Expression to match [100 to 700]	X
Attribute productType	Expression to match Residential	X

ADD RULE ADD GROUP

i Lucene query will be used for categorization. See [Lucene Query Syntax](#)

Cancel Save

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

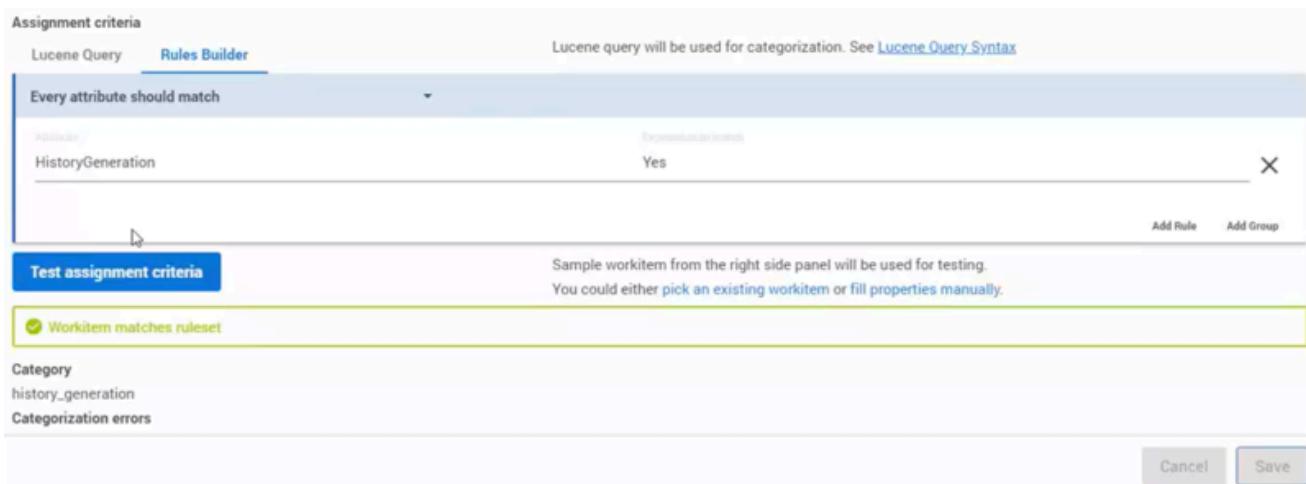
1. Select the **Configuration** tab.
2. Open the collapsible **Categories** panel.
3. Select a Category and click **pick an existing workitem** in the **Assignment criteria** section. The

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 screenshot shows the 'Test assignment criteria' dialog box. At the top, there are tabs for 'Lucene Query' and 'Rules Builder', with 'Rules Builder' being the active tab. Below the tabs, there is a text input field for 'Lucene query' with the placeholder 'Every attribute should match'. To the right of the input field, a note says 'Lucene query will be used for categorization. See [Lucene Query Syntax](#)'. Below the input field, there is a dropdown menu set to 'Every attribute should match'. The main content area shows a table with a single row. The row has a 'Rule' column with 'HistoryGeneration' and a 'Result' column with 'Yes'. There are 'Add Rule' and 'Add Group' buttons to the right of the table. At the bottom of the dialog, there is a 'Test assignment criteria' button, a note about using a sample workitem for testing, and a 'Workitem matches ruleset' message. The 'Category' section at the bottom lists 'history-generation' and 'Categorization errors'. At the very bottom are 'Cancel' and 'Save' buttons.

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 identically 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.

Categories Reordering

Are you sure you want to read the new category tree structure?

Note: This may impact how incoming email and work items are processed

No

Yes

