Intelligent Workload Distribution Administrator's Guide

View, edit, and create Categories and Rules

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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:

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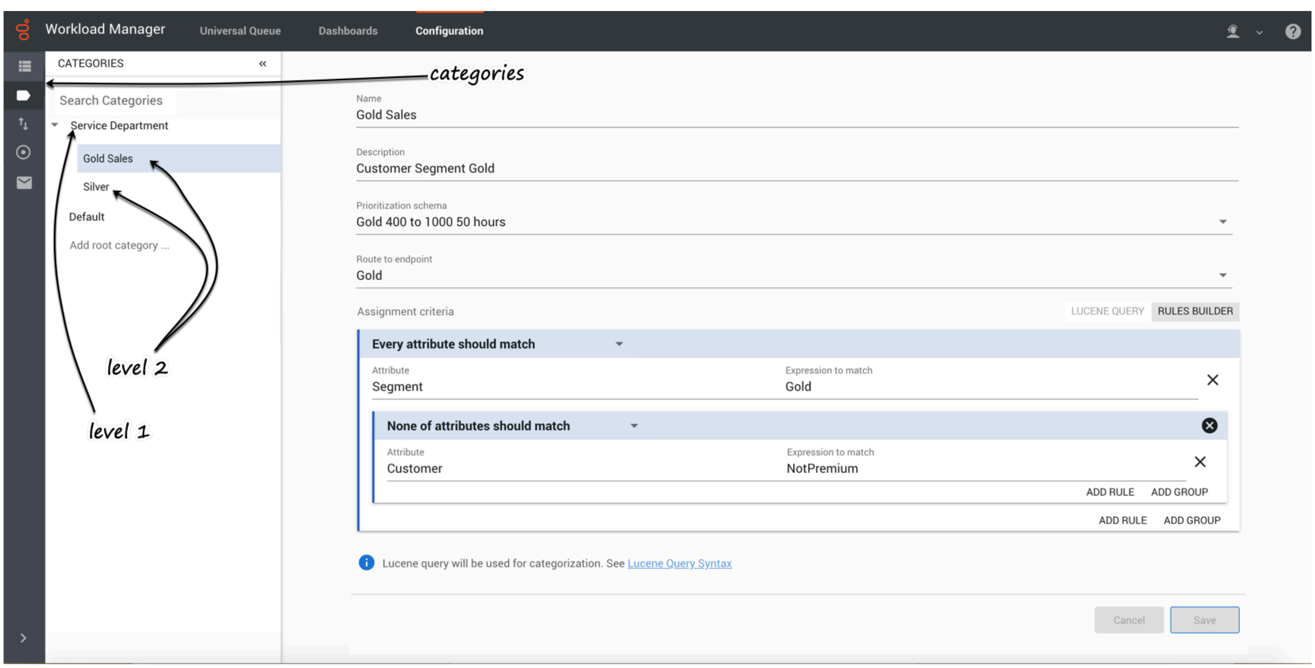
> **Important**
> Changes to Categories can have significant impacts on contact center operation.

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



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

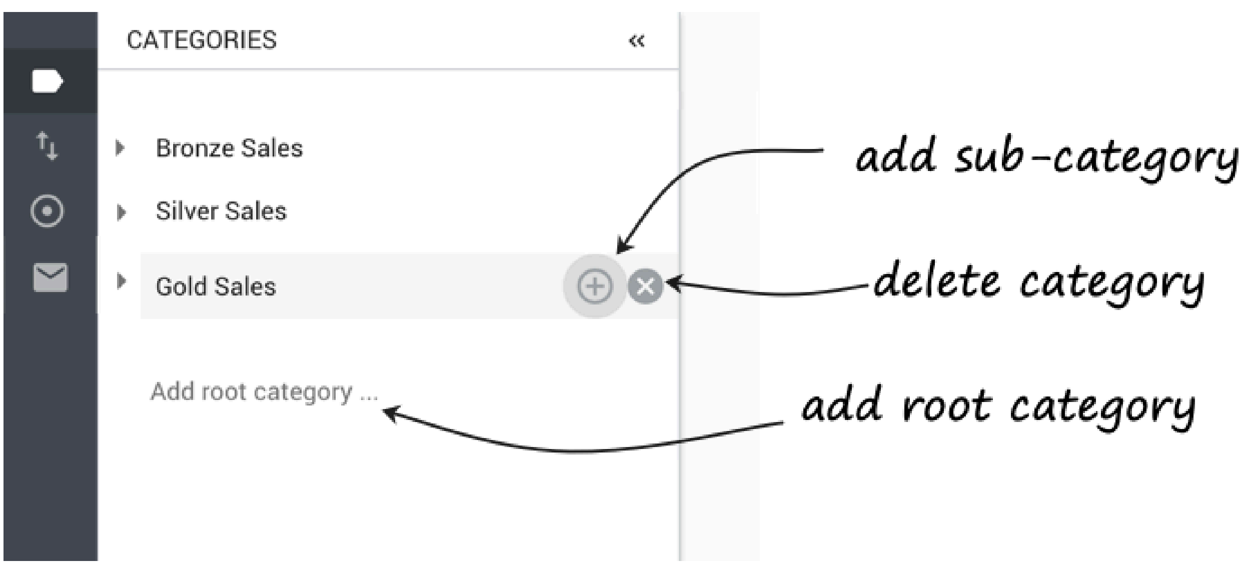
The first level of Category (**Service Department** in the screenshot above) translates to the Department in historical reporting (for example, here).

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

The third level, and any lower levels, do not translate to historical reporting. These levels add power to the capabilities, but you should establish a clear business reason why you need to configure more than two levels.

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

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.

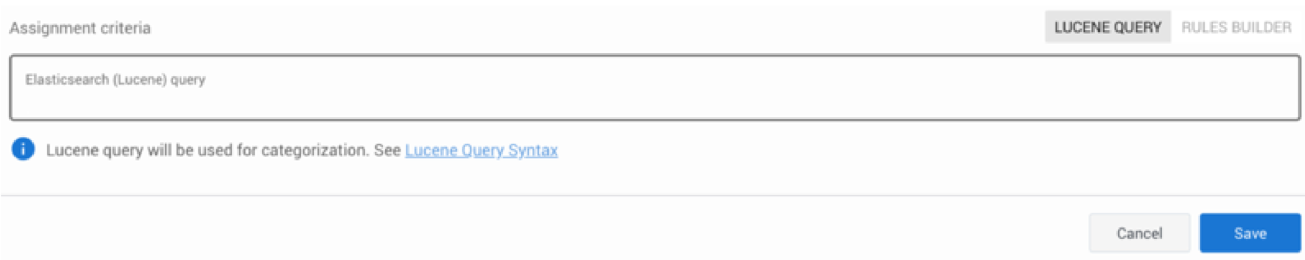
9. Click **Save** when you're done.

Rules

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.

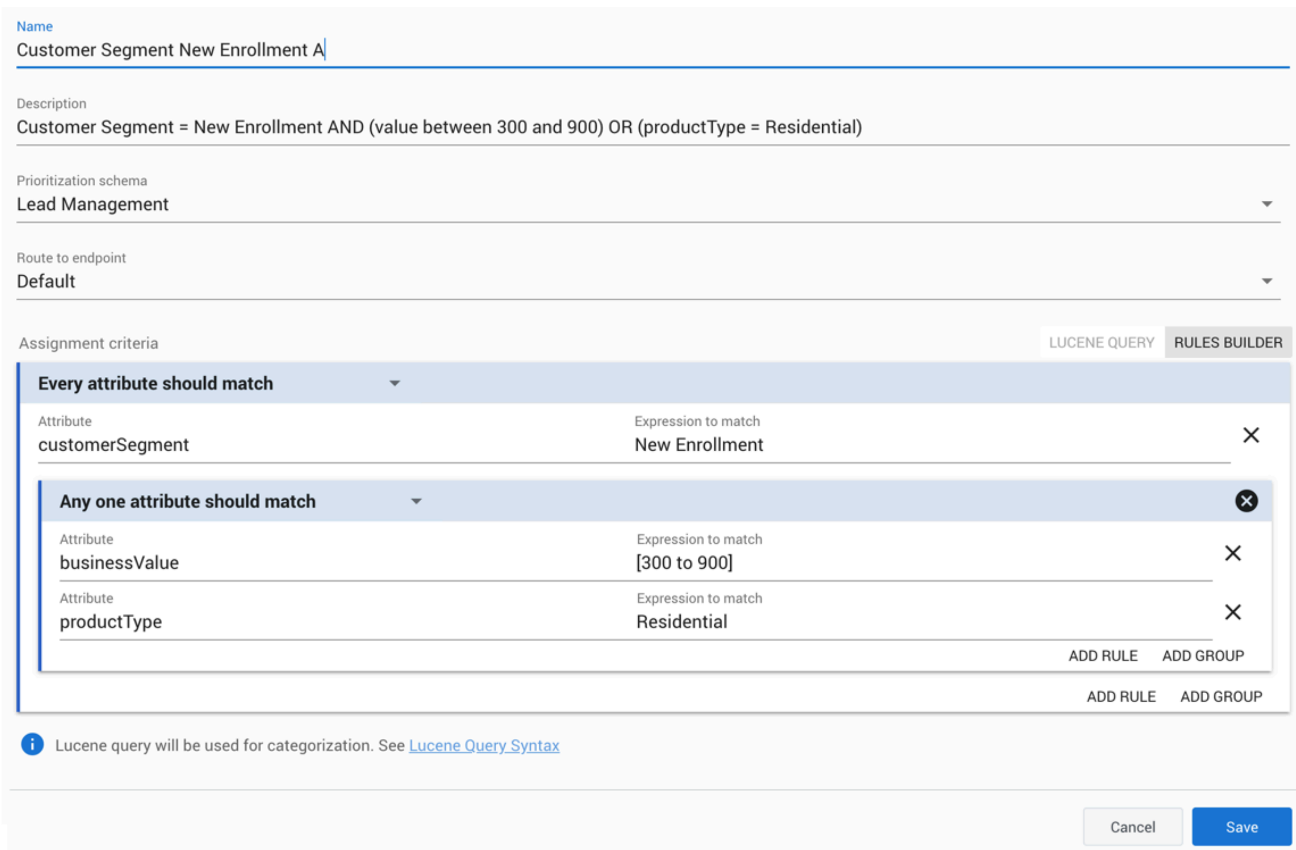
Lucene queries

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

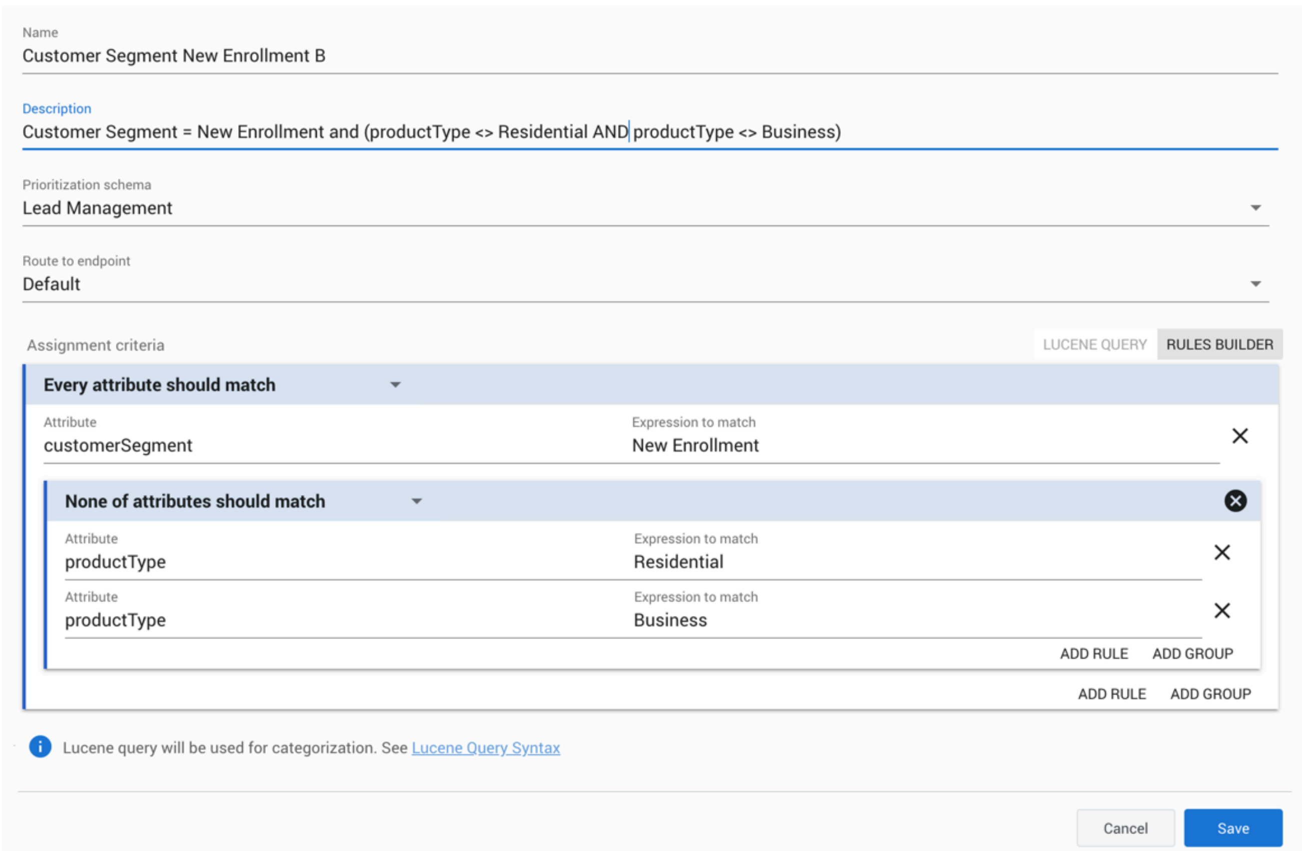


Example 1

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`.

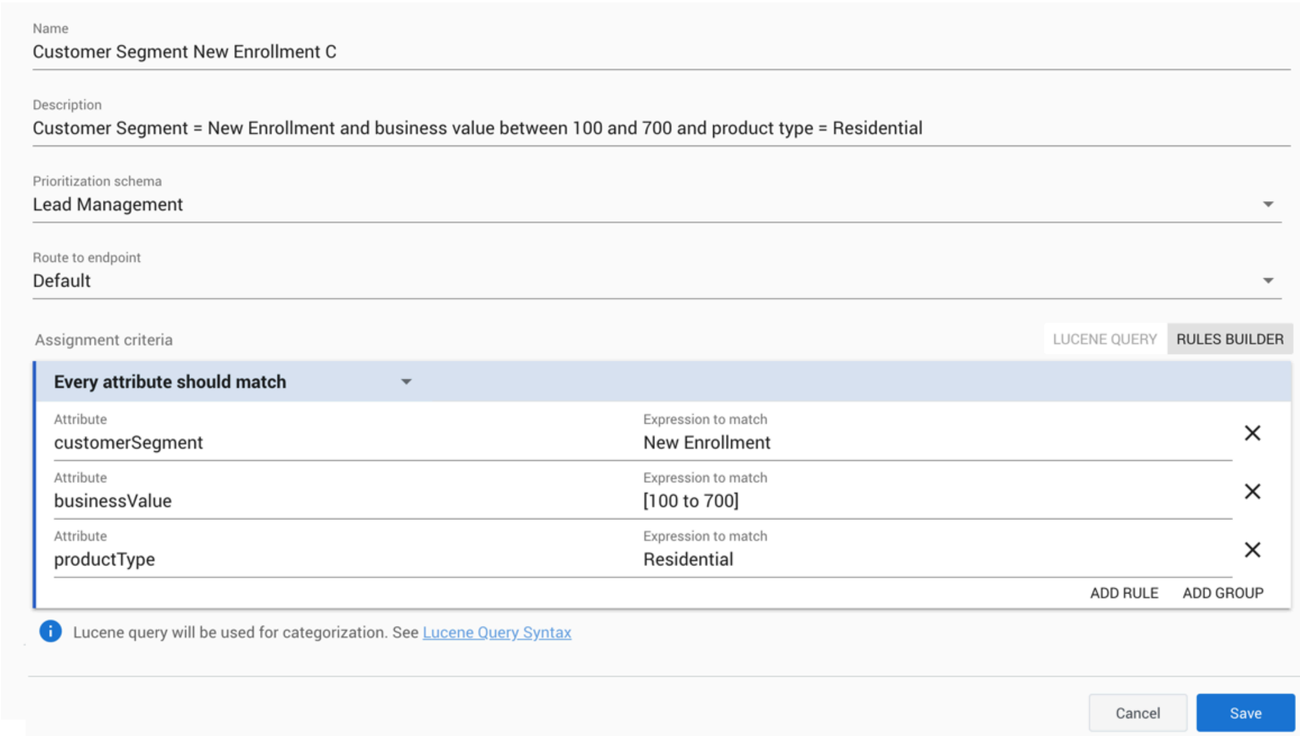


Example 2

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`.

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.