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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:

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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

The screenshot displays the 'Workload Manager' configuration interface. On the left, a 'CATEGORIES' sidebar shows a tree structure under 'Service Department' with 'Gold Sales', 'Silver', and 'Default' listed. Handwritten annotations indicate 'level 2' for 'Gold Sales' and 'level 1' for 'Silver'. The main configuration area is titled 'categories' and shows details for the 'Gold Sales' category. Fields include Name ('Gold Sales'), Description ('Customer Segment Gold'), Prioritization schema ('Gold 400 to 1000 50 hours'), and Route to endpoint ('Gold'). The 'Assignment criteria' section is active, showing two rules: 'Every attribute should match' (Segment: Gold) and 'None of attributes should match' (Customer: NotPremium). A note at the bottom states: 'Lucene query will be used for categorization. See [Lucene Query Syntax](#)'. Buttons for 'Cancel' and 'Save' are at the bottom right.

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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

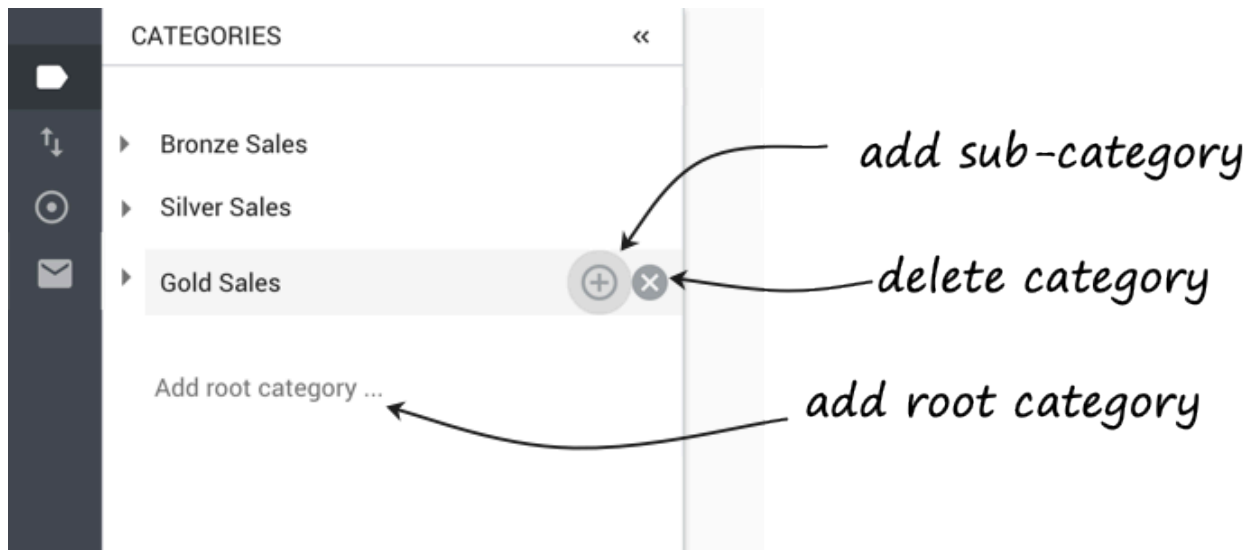
The first level of Category (**Service Department** in the screenshot above) translates to the Department in historical reporting (for example, here).

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...**

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- 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:

Assignment criteria LUCENE QUERY RULES BUILDER

Elasticsearch (Lucene) query

i 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	Expression to match	
customerSegment	New Enrollment	✕

**Any one attribute should match**

businessValue	[300 to 900]	✕
productType	Residential	✕

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.

The screenshot shows the 'Rules Builder' interface for a rule named 'Customer Segment New Enrollment B'. The description is 'Customer Segment = New Enrollment and (productType <-> Residential AND productType <-> Business)'. The prioritization schema is 'Lead Management' and the route to endpoint is 'Default'. The assignment criteria are defined as follows:

Group	Attribute	Expression to match
Every attribute should match	customerSegment	New Enrollment
None of attributes should match	productType	Residential
	productType	Business

Buttons for 'ADD RULE' and 'ADD GROUP' are visible at the bottom of the criteria list. A note at the bottom states: 'Lucene query will be used for categorization. See [Lucene Query Syntax](#)'. 'Cancel' and 'Save' buttons are at the bottom right.

## 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	Expression to match	✕
<b>customerSegment</b>	<b>New Enrollment</b>	✕
<b>businessValue</b>	<b>[100 to 700]</b>	✕
<b>productType</b>	<b>Residential</b>	✕

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

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

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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.

Configure a Category-level email auto-acknowledgement



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## 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 indentially 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.