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Intelligent Workload Distribution Administrator's Guide

Search, display, manage, and update work items

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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:

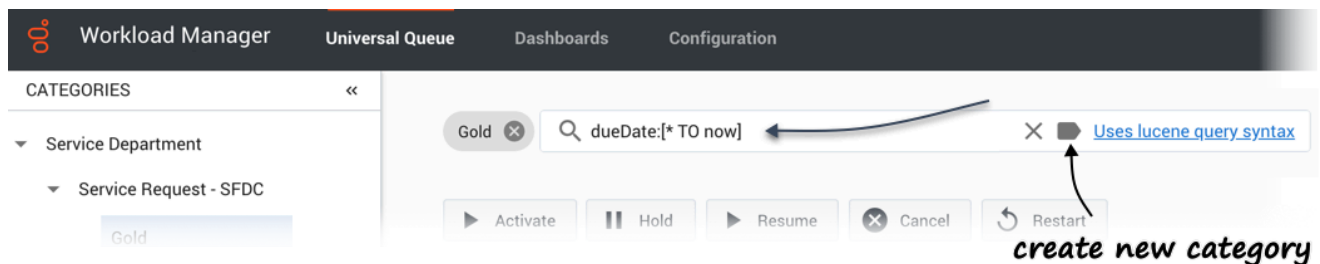
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Overview of search and filter functions

[Link to video](#)

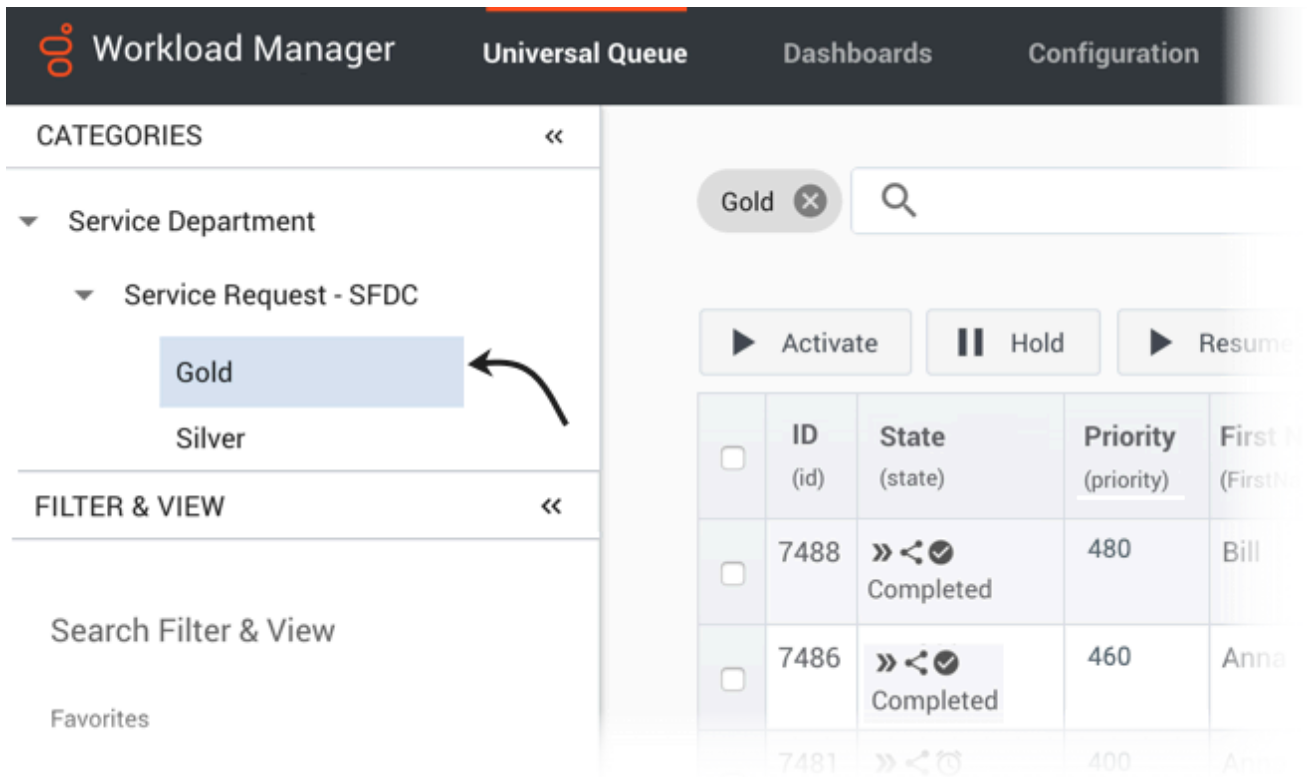
You can use quick filters, filter by categories, create custom filters, and search for work items in the **Universal Queue** window.

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 criteria 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

Workload Manager Universal Queue Dashboards Configuration

CATEGORIES «

- Service Department
 - Service Request - SFDC
 - Gold
 - Silver

FILTER & VIEW «

Search Filter & View

Favorites

No items yet

Filter & View

- 1 day to due date
- 10 days to due date
- Assigned to agents
- Close to due date
- Completed but never assigned
- Currently in routing
- Default

Gold X

Activate Hold

<input type="checkbox"/>	ID (id)	State (state)
<input type="checkbox"/>	7488	» < ✓ Completed
<input type="checkbox"/>	7486	» < ✓ Completed
<input type="checkbox"/>	7481	» < ⌚ Expired
<input type="checkbox"/>	7475	» < ⌚ Expired
<input type="checkbox"/>	7474	» < ✓ Completed
<input type="checkbox"/>	7472	» < ⌚ Expired
<input type="checkbox"/>	7471	» < ⌚ Expired
<input type="checkbox"/>	7468	» < X Deleted

Rows per page 30

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

The image shows a 'Save Filter & View' dialog box and a 'Views' dropdown menu. The dialog box is titled 'Save Filter & View' and contains the following fields:

- Filter & View Name:** A text input field with a blue border.
- Filter details:**
 - Category: All categories
 - Query: state: Routing
- View details:**
 - Table columns: ID, State, Priority, First Name, Last Name, Email, Category, Subject, Created, Due Date
 - Order by: Created (desc), Priority (desc)
 - A toggle switch labeled 'Save view' is currently turned on.
- Buttons: 'Cancel' and 'Save'.

The 'Views' dropdown menu is open, showing the following options:

- State column view
 - Color-coded
 - Extended (checked)
 - Simple
- Filter & View
 - Save current state
 - Reset filtering
 - Restore default table view
- Filter & View list
 - Restore preconfigured

An arrow points from the 'Save current state' option in the dropdown menu to the 'Save Filter & View' dialog box.


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.

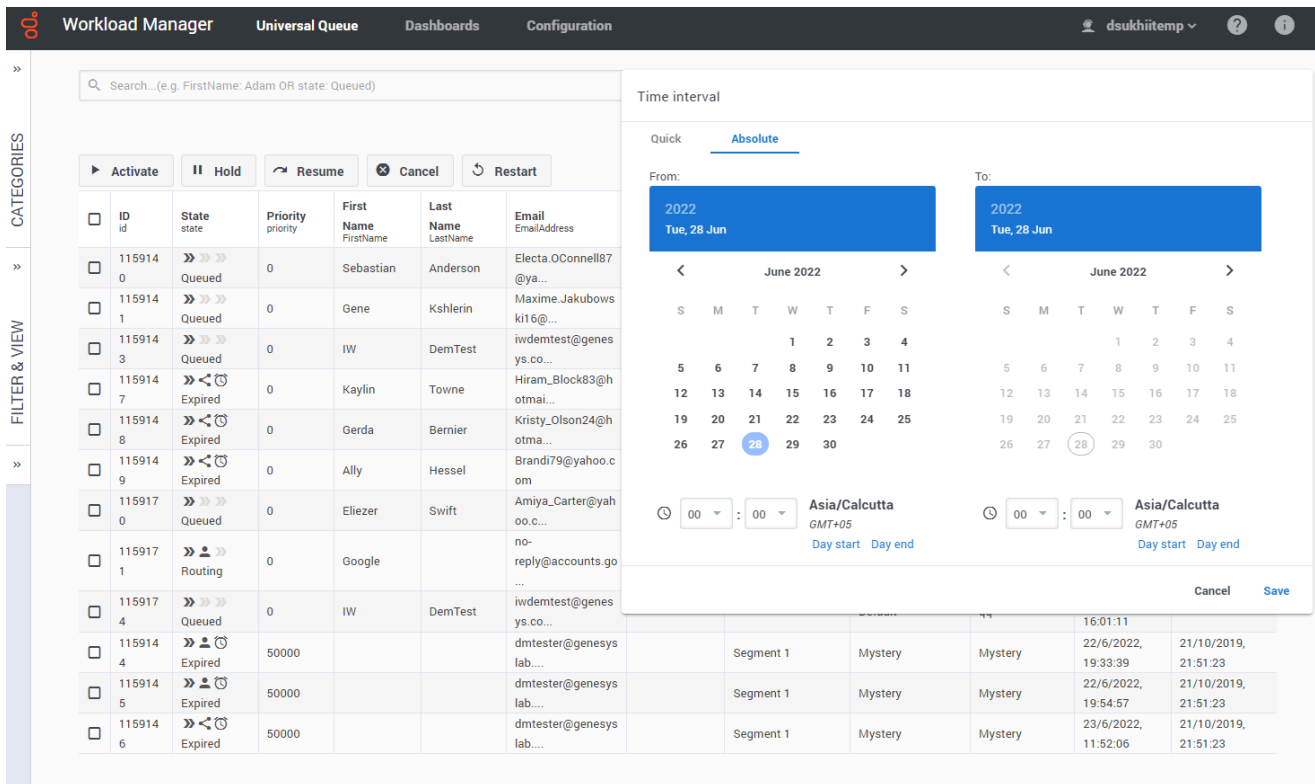
Extended states

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	New
» » »		Not yet distributed
	Classified	Classified
	Queued	Queued
» »	Hold	Held
» < »	Routing	In routing state, not yet assigned
» 👤 »	Assigned 👤	Being processed by an agent
» 👤 ✓	Completed 👤	Completed with agent involvement
» 👤 ⌚	Expired 👤	Expired (reached its due date) with agent involvement
» < ✓	Completed	Completed without agent involvement
» < ⌚	Expired	Expired (reached its due date) without agent involvement
	Deleted	Workitem has been deleted

Extended	Colored	Description
		Workitem has an error

Search by time interval



The screenshot shows the Workload Manager interface with a search filter for time intervals. The main table lists work items with columns for ID, State, Priority, First Name, Last Name, and Email. A 'Time interval' dialog box is open, showing 'Quick' and 'Absolute' options. The 'Absolute' option is selected, and the date range is set to '2022 Tue, 28 Jun'. The dialog also includes a calendar view for June 2022 and time selection fields for 'Day start' and 'Day end'.

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.

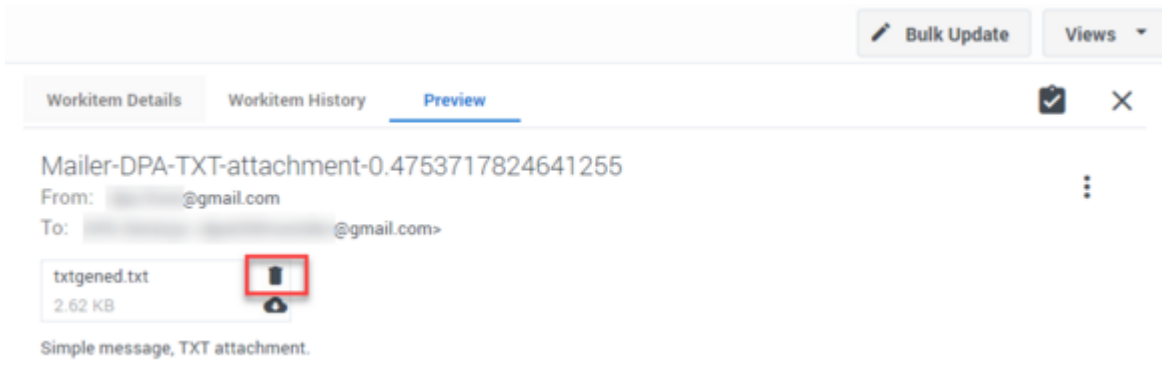
The Delete feature must be enabled using the option **enableDeleteAttachments** : *True* in Workload Manager's **interaction-workspace** section.

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.

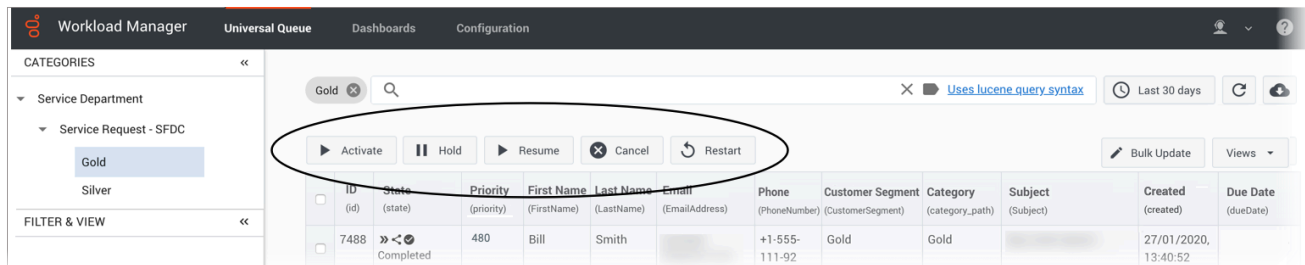
Tip

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.