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Intelligent Workload Distribution Administrator's Guide

Integrate IWD with Genesys Workforce Management (WFM)

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- Administrator

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

Related documentation:

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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.

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- **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.