GENESYS

Intelligent Workload Distribution Administrator's Guide

Set up IWD

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Contents

Learn how to set up IWD, integrate it with third-party source systems and/or email providers, and use the IWD API to submit work items, emails and leads ("work items") to IWD.

Related documentation:

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Define agents and agent groups

Use Agent Setup to define agents and agent groups who will handle work items from your external systems.

- Define agents and agent groups.

- Your Genesys team will initially configure Role-Based Access Control (RBAC) for all users of Workload Manager.

Enable work item channel

Link to video

Watch this video to learn how to enable work item channel.

Add the following configuration option in Agent Setup to enable the work item channel for your agents or agent groups:

1. Select an agent from the **Users** tab or an agent group from the **Agent Groups** tab.

2. Navigate to **Annex** and find the **interaction-workspace** section.

3. If the **interaction-workspace** section does not exist, click **Add Section** and create it; otherwise, click the **interaction-workspace** section.

4. Click **+** to create a key called **openmedia.workitem-channels**.

5. Assign **workitem** as the value and click **Save**.

Configure Agent Workspace

Configure Agent Workspace for the agents in your contact center.

Create a routing application

Define a routing application in Designer to route work items, leads and email to agents based on skill, agent group, and so on.

Create an application to submit workitems to IWD

Create a third-party system adapter to handle work items that come from your external source and submit them to Genesys. A third-party application such as Salesforce or Netsuite can interact with IWD through the iWD API.

Configure Engage cloud mailboxes

When your Engage cloud email is provisioned (by Genesys), create Mailboxes to process incoming and outgoing email as work items.

Set up notifications back to the source system

Ask your Genesys team to configure other global IWD settings, including setting up notifications back to the source system by configuring a webhook integration. Click here for more detail on webhooks.

You must configure one webhook URL per source system to be configured so that your source system can receive messages about work items back from IWD. Work with your Genesys representative to configure this.

Configure the IWD application

Use Workload Manager to:

- Create Endpoints that correspond to the target endpoints created in your Designer routing application.

- Create Categories that correspond to specific departments or business processes and their hierarchies (business context). Associate each category with an Endpoint. Create a set of Service Level Agreement-based rules for how work items in each Category are to be handled.

- Create Prioritization schemas that control the logic and speed with which work items are (re-)prioritized both before and after their Service Level Agreement. Associate the schemas to Categories.

- Create Engage cloud Email mailboxes for your IWD solution.

- Provision or create Standard Response Library content to use in auto-acknowledgement emails.

Start/update/stop a work item

The typical workflow is as follows:

1. The application creates a work item through the IWD API.
2. The application updates the work item through the IWD API (if needed).
3. The application stops the work item.

There are two ways for the application to stop an interaction:

- Implicit (recommended)—stop by invoking Mark Done. For this method, complete the following steps:

  1. Set up Agent Workspace to use the Service Client API.
  2. Disable the **Mark Done** button in Agent Workspace (as mentioned earlier in Configuring Agent Workspace and instead invoke the **markdone** method.
  3. Set the disposition code by invoking the **setUserData** method.

- Explicit—stop by using the IWD API. This requires additional configuration from your Genesys representative.

A sample application that demonstrates using the IWD API is also available through your Genesys representative.

Monitor and manage the Universal Queue

- Monitor the near real-time activity of your contact center as IWD manages the universal queue of work items.
- Manage individual work items or groups of them while IWD queues and distributes them.

Report on contact center activity

- Report on historical contact center activity using Genesys CX Insights.

- Report on real-time activity through the Workload Manager Monitoring features on the **Dashboards** tab and through Genesys Pulse.