intelligent Workload Distribution

Manager Guide

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Preface

Welcome to the *intelligent Workload Distribution Manager Guide*. This document describes how to monitor and manage tasks in *Genesys intelligent Workload Distribution (iWD)*.

Intended Audience

This guide has two primary audiences:

- IT staff who are responsible for the iWD system monitoring.
- Managers who are responsible for task and resource monitoring and management.

Related Resources

See the following additional resources for more information:

- *iWD Overview*
- *iWD Deployment Guide*

Document Conventions

This document uses the following stylistic and typographical conventions, which serve to identify specific types of information:

Type Styles

Italic

In this document, italic text denotes emphasis, document titles, definitions of (or first references to) unfamiliar terms, and mathematical variables.

For example:

- Please consult the *intelligent Workload Distribution Manager User Guide* for more information.
- *Do not use* this value for this option.
- The formula, $x + 1 = 7$ where x stands for . . .

Monospace Font

A monospace font, which resembles `teletype` or `typewriter` text, is used for all programming identifiers and graphical user interface (GUI) elements.

This convention includes the names of directories, files, folders, configuration objects, paths, scripts, dialog boxes, options, fields, text and list boxes, operational modes, all buttons (including radio buttons), check boxes, commands, tabs, CTI events, and error messages; the values of options; logical arguments and command syntax; and code samples.

For example:

- Select the `Default` check box.
- Click the `Edit` button.
- In the `Properties` dialog box, enter the value for the host server in your environment.
- Click `OK` to exit the `Properties` dialog box.

Monospace is also used for any text that users must manually enter during a configuration or installation procedure, or on a command line:

For example:

- Enter `exit` on the command line.

Task Management

Task Management allows monitoring and management of tasks that are being processed via iWD:

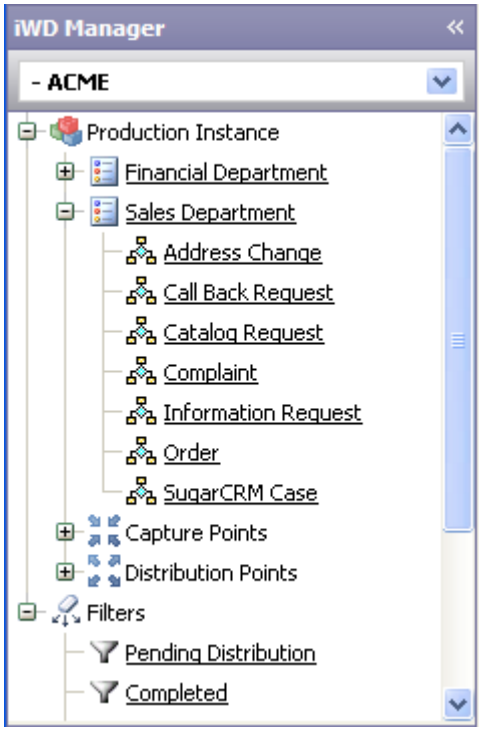
- Use Task Monitoring to view a list of tasks that are associated with different business contexts, as well as details and history for each task.
- Use Task Operations to override configured task-handling logic by performing a manual task operations on specific tasks such as Hold, Resume, Cancel, and Modify.
- Use Ref422553544 Filters to refine the list of tasks that are available in Task Monitoring by defining filter criteria and visible task attributes (columns).

Task Monitoring

Task Monitoring allows to viewing of a current list of tasks for a number of business contexts:

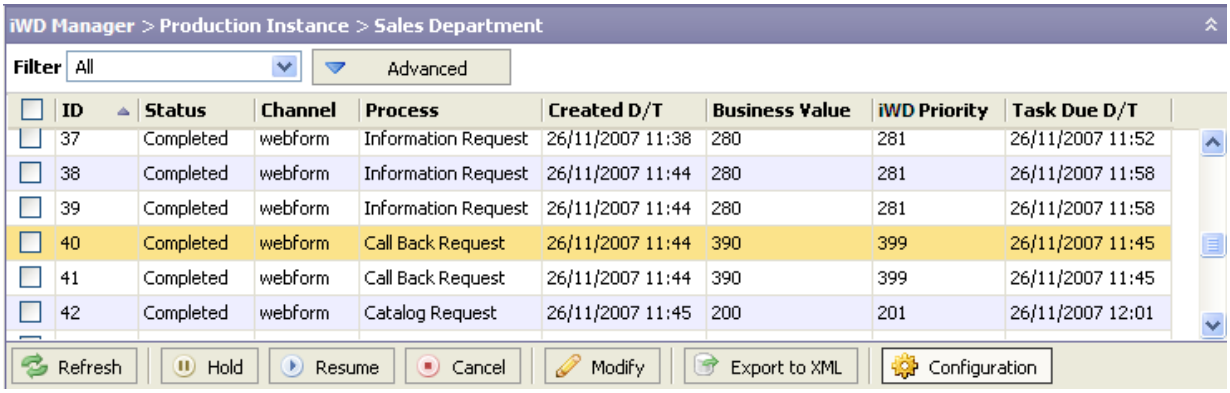
- Contract
- Process
- Capture Point
- Distribution Point

All of the available contexts are displayed in the navigation tree, as illustrated in the image on the right. When a context is selected, the corresponding list of tasks is displayed in the Task List.



Task List

The Task List displays a list of tasks for the selected business context, as illustrated below:

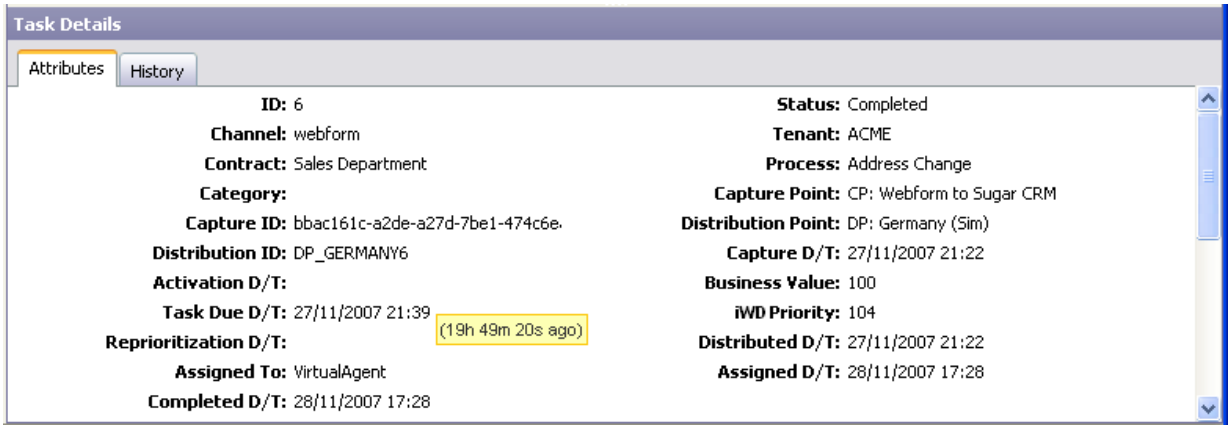


The following attributes and actions are available in the Task List:

Attribute/Action	Description
Filter	Refines the Task List and displayed columns, based on the selected filter. For more information on filters, see Filters.
Advanced Filters	Advanced filters let user further narrow down the tasks that are listed in tasks table. Up to three additional conditions can be added to a selected filter. All of the task's core and extended attributes are available. To add an advanced filter, select the attribute name from the dropdown list. Advanced filters cannot be saved and are retained only during a iWD Manager session.
Refresh	Refreshes the Task List.
Hold, Resume, Cancel, Modify, Export to XML	Performs corresponding operation on the selected task. The task is selected if the first column of the task row in the list is checked. To select/unselect all tasks in the list, click the first column in the table header. If no task is checked, but task details are opened for some task, this task is also considered to be selected. For more information on specific operations, see Task Operations.
Configuration	Opens the configuration view of the current business context. This action can be restricted by a security policy.
Click task row	Displays task details. The selected row is marked as illustrated in the preceding image.

Task Details

Task Details displays all of the available attributes for the task that is selected in the Task List.



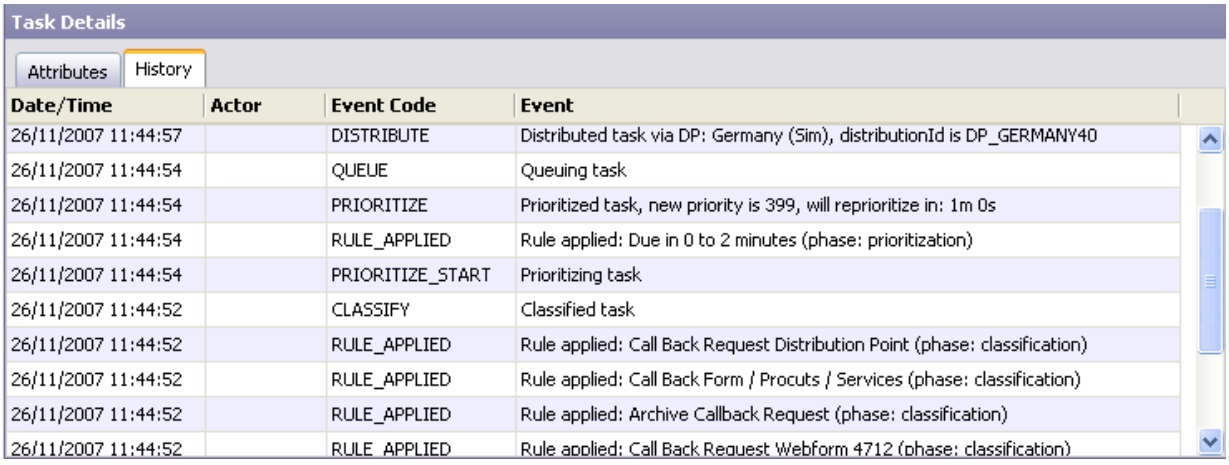
Attributes are broken down into three sections:

- Top: Core task attributes
- Middle: Extended task attributes (displayed only when the task has any extended attribute filled)
- Bottom: Custom task attributes

For attributes that display a timestamp such as Task Due D/T, it is possible to view the offset from the current time by moving the mouse cursor on top of the attribute. The offset is displayed in a hint, as illustrated in the preceding image (for 19h 49m 20s ago for Task Due D/T).

Task History

Task History can be viewed by clicking the History tab in Task Details view. It displays all of the events that are related to the task that has been selected in the Task List.



The following attribute and actions are available in Task History view:

Attribute/Action	Description
Date/Time	The date/time when the event occurred.

Attribute/Action	Description
Actor	Shows who triggered the event. This is empty for iWD-system-triggered events.
Event Code	Represents type of the event: • NEW: Task is just created. • CLASSIFY_START: Task classification has started. • CLASSIFY: Task classification has finished. • PRIORITIZE_START: Task initial prioritization has started. • PRIORITIZE: Task initial prioritization has finished. • REPRIORITIZE_START: Task reprioritization has started. • REPRIORITIZE: Task reprioritization has finished. • RULE_APPLIED: A configured business rule has matched the task state and corresponding rule actions have been executed. • HOLD _NEW, HOLD: Task is held. This can be triggered by the task source system or bu the user via the task Held operation. • RESUME _NEW, RESUME: Task is resumed from the held state. This can be triggered by the task source system or by the user via the task Resume operation. • REJECT: Task was rejected. Either the contract or the process to which the task was associated is expired or not yet active. • ERROR _NEW, ERROR: A processing error has occurred, and the task was held for that reason. • CANCEL_NEW, CANCEL, CANCEL_HELD: Task is canceled. This can be triggered by the task source system or by the user via the task Cancel operation. • RESTART, RESTART_HELD: Task is restarted. • UPDATE_NEW, UPDATE: Task attributes are updated. This can be triggered by a task source system or distribution system, or by the user via the task Modify operation. • DISTRIBUTE: Task is distributed to a distribution

Attribute/Action	Description
	system. • ASSIGN: Task is assigned to an agent. • FINISH: Agent has finished working on the task. • ABANDON: A agent has abandoned the assigned task. • COMPLETE: Task is completed.
Event	A formatted description of the event.

Task Operations

Task operations provide the ability to override manually the configured task-handling business logic. Task operations are performed on the selected task, as described in Task Monitoring.

Hold Tasks

The Hold Tasks operation holds the selected task, so that no further processing is performed on a task it is resumed by the Resume Tasks operation. When a task is held, it will not be reprioritized, distributed, or assigned to an agent. If a task is distributed when it is held, it will be revoked from the distribution system.

Only tasks that are Queued or Distributed can be held.

Resume Tasks

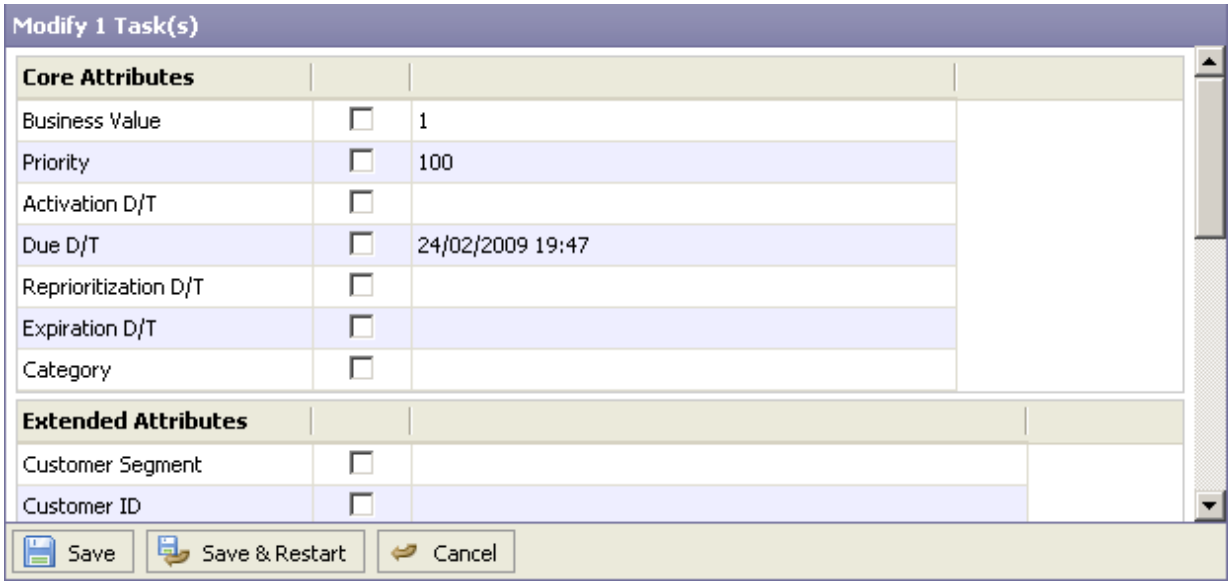
The Resume Tasks operation resumes processing of a held task. Only held tasks can be resumed.

Cancel Tasks

The Cancel Tasks operation permanently cancels processing of the selected task. A task cannot be canceled if it is assigned or already has been completed, canceled, or rejected.

Modify Tasks

The Modify Tasks operation allows an update of the number of task attributes and, optionally a restart of the task.



An attribute will be updated only if the check box that is next to it is checked; it will be checked automatically, if a value of the corresponding field has changed. If the task is also restarted, its status is set to New, and it is classified and prioritized again in the same way as a new task.

Export Tasks to XML

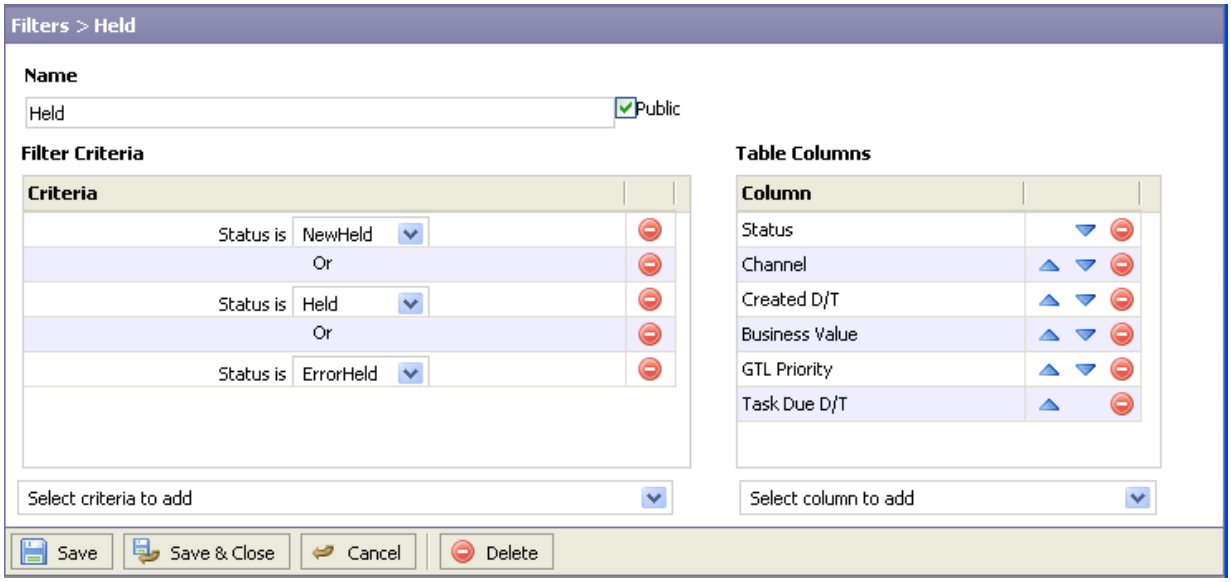
The Export Tasks to XML operation exports **all** of the tasks that are displayed in the current Task List to an XML file; this operation does not rely on the task selection. The XML file will contain all of the available attributes for each task in the standard iWD format - for example:

```
<tasks>
     <task>
               <tenantId>ACME_SIM</tenantId>
               <contractId>ACME_SD</contractId>
               <processId>ACME_SD_InfRqs</processId>
               <captureId>7025fc19-5c4b-11cd-9154-
474c6daf1f4c</captureId>
          ...
          <data>
                         <Address_1>Central Street 22-
22</Address_1>
                         ...
                              </data>
     </task>
     <task>
          ...
     </task>
     ...
</tasks>
```

When ti has been exported, a task from an XML file can be imported into a third-party application (such as Microsoft Office Excel) for further analysis and processing.

Filters

Filters allow one to refine a list of tasks that are available via Task Monitoring. Each filter is defined by a set of filter criteria (optional) and table columns that will be displayed in the Task List.



The following attributes and actions are available in Filters view:

Attribute/Action	Description
Name	The name of the filter.
Public	Whether the filter will be available to all users (checked) or only the current user (unchecked).
Filter Criteria	Tasks that do not match the defined criteria will be excluded from the Task List when the filter is selected. New criteria conditions can be added by selecting them from the "Select criteria to add" dropdown. The numbers of criteria conditions are parameterized; for such conditions, parameters can be configured directly in a criteria table (such as status for "Status is ..." criteria).
Table Columns	The Task List will display these columns when the filter is selected. Columns can be added, removed, and reordered.
Save, Save & Close, Cancel, Delete	Standard iWD Manager functions, as described in the iWD Manager Overview section of the iWD Deployment Guide.