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Workforce Management Administrator's Guide

Manually Creating and Configuring WFM Application Objects

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This topic contains information and procedures that will help you use Genesys Administrator and other tools to manually create Workforce Management (WFM) Application objects and perform other configurations manually.

Manually Create the Application Objects

If you are familiar with Genesys Administrator, you can create and configure the component Application objects manually rather than using the wizards. See [Creating New Sections and Options](#).

Tip

You might also want to install redundant WFM Servers. If so, see [Connect to Backup WFM Server](#).

WFM Daemon Setup

To successfully run WFM Daemon, you must set the correct SMTP server host and port. Depending on your configuration, you might also need to set the user name and password. For information about how to set these options, see the **[SMTP]** section of [WFM Daemon Options](#).

To support automatic report creation, perform these configurations using Genesys Administrator:

- In the WFM Web Application, set the **[Reports]** ServerURL configuration option. See [Installing WFM Web as Report Server](#).
- In the WFM Web Application, set the **[Reports]** PathToAutoGeneratedReports to the network path for storing generated reports.
- In the WFM Daemon Application, add a connection to the WFM Web Application that you installed as the report server in [Installing WFM Web as Report Server](#).

For notifications to work successfully:

- Each agent and supervisor must have the proper email set. E-mail addresses are initially defined in Genesys Administrator as part of the **Person** object. Once email addresses exist in the Configuration Database, they are automatically imported into WFM Database.

- The supplied SMTP server must be configured to accept emails for those addresses. Before anything can be sent, you must first configure notifications in WFM Web for Supervisors, **Configuration** module.
- A Supervisor's ability to receive notifications depends on their security settings (see [User Security](#)). Supervisors must be granted rights to receive notifications for each notification type and have access to the agent teams for which they want to receive notifications.

For more information about user security and notifications, see [Workforce Management Web for Supervisor Help](#).

Manually Change Configuration Server Host and Port

You might need to change the Configuration Server host and port information for the WFM servers after installing WFM.

Important

Editing a `startServer.bat` file is effective only if the server is started by using the `.bat` file. If you start the server manually from the control panel, or if it is started automatically as a Windows service, you must unregister the server and then re-register it. If you start the server using the Solution Control Interface (SCI), you must change the settings for the server in the server's **Application** object, by using Genesys Administrator.

To update or change this information manually you can use one of two methods:

- Edit the `startServer.bat` file for each affected server.
- Unregister the servers and then reregister them, by using the updated host, port, and application name information.

For procedures that describe both methods, see [Editing the startServer.bat Files](#) and [Using Server Registration to Change Host and Port](#).

The `startServer.bat` files for each server are located in the same directory as the executable for that server.

Backup Configuration Server Host and Port

WFM Web supports a backup Configuration Server during application startup with the addition of two new values in `ConfigServer.properties` file: `BackupHost` and `BackupPort`. These options are specified in the same way as the `Host` and `Port` options and have the same meaning, except that they specify how to connect to the backup Configuration Server. If the primary Configuration Server is not available, WFM Web uses this information to connect to the backup Configuration Server.

To configure these options manually, edit the `ConfigServer.properties` file in the Tomcat directory `webapps\wfm\WEB-INF` (assuming that WFM Web was deployed as `wfm.war`, otherwise `wfm` should be

replaced with the specified name). In addition, the application name must be the same on both primary and backup Configuration Server.

For more information about configuring connections to backup Configuration Server, see [Connect to Backup Configuration Server](#).

Tip

These options might not be set automatically during application startup. By default, they do not exist. Therefore, you must configure the options manually, as described above.

Procedures

Click the drop-down list below to display a list of procedure related to the topics on this page.

Creating Application Objects Manually

Purpose: To create WFM Application objects manually.

Start of Procedure

1. In Genesys Administrator, open the **Environment > Applications** folder.
2. Right-click in the folder and select **New Application** from the shortcut menu that appears.
3. Browse to and select the appropriate application template from those you previously imported. If necessary, see [Importing Application Templates](#) for instructions.
4. Enter the appropriate information in each tab of the **Application** object.
The information on most of these tabs is familiar to regular users of Genesys Administrator. Ensure the settings are correct on the Connections tab of each Application object. For the complete set of required connections, see [WFM Component Connections](#).

End of Procedure

Next Step:

- Manually configure the **Options** tab settings. For a list of options with default settings and descriptions, see [Workforce Management Options Reference](#).

Editing the startServer.bat Files

Purpose: To edit the WFM startServer.bat files.

Start of Procedure

1. To edit the WFM startServer.bat file, stop the WFM server.
2. Open the startServer.bat file in a text editor such as WordPad.
3. Change the host and port information.
4. Save the edited file.
5. Restart the server.

End of Procedure

Using Server Registration to Change Host and Port

Purpose: To change the host and port for a server.

Summary: You can also change the host and port information for the servers by unregistering them as services and then re-registering them using the new host and port.

Start of Procedure

1. Execute the following command from the command line to unregister the installed service:
`<server .exe filename> -remove`
For example, WFMServer.exe -remove
2. Register the service with new host and port information:
`<server .exe filename> -install -host "<hostname>" -port "<portnumber>" -app <applicationname>`
For example, WFMServer.exe -install -host "Siamese" -port 4000 -app WFMServer_76

End of Procedure