Workforce Management 7.6

Configuration Utility

User's Guide

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Table of Contents

Preface

Welcome to the Workforce Management Configuration Utility User's Guide. This document introduces you to the concepts, terminology, and procedures which are relevant to Workforce Management Configuration Utility. Much of the information in this book can also be found in the Configuration Utility on-line help system.

This preface contains these sections:

Genesys Workforce Management is a contact center resource-planning application, which consists of a client, the Workforce Management GUI, and Schedule Server, Data Aggregator, and Web Services server software. The servers make data available to Workforce Management by writing it to the Workforce Management database, serve real-time agent states, and provide browser-based functionality.

Genesys Workforce Management unifies employee scheduling and preference allocation, planning, real-time and intraday management, performance assessment, and historical reporting into a consolidated contact center resource-planning application. The Workforce Management component in this product uses interaction data that the servers collect to:

- Forecast contact-center workload and workforce requirements.
- Create agent schedules.
- Monitor adherence to schedules, including the display of real-time agent states.

Intended Audience

This document is intended for use by System Administrators at a contact center and those who train them. All information in this book can also be found in the Configuration Utility on-line help system, accessed through the Configuration Utility software.

Document Conventions

This document uses certain stylistic and typographical conventions—introduced here—that serve as shorthands for particular kinds of information.

Document Version Number

A version number appears at the bottom of the inside front cover of this document. Version numbers change as new information is added to this document. Here is a sample version number:

75wfm_ref_08-2006_v7.5.001.00

Type Styles

Italic

In this document, italic is used for emphasis, for documents' titles, for definitions of (or first references to) unfamiliar terms, and for mathematical variables.

Examples:

- Please consult the *Genesys Migration Guide* for more information.
- *A customary and usual practice* is one that is widely accepted and used within a particular industry or profession.

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Chapter

1 Getting Started Overview

This chapter covers the following topics:

Summary

With Workforce Management (WFM) Configuration Utility you can:

- View your schedule.
- Select a scenario for schedule bidding.
- Indicate schedule preferences.
- See how much time off you have of each time-off type.
- Request time off.
- View other agents' schedules (if enabled at your site).
- Trade your schedule days with other agents (if enabled at your site).

Overview

Use the Configuration Utility after you have:

- Defined switch, agent, agent skill set, user, and time zone information in the Genesys Configuration Database using Configuration Manager. You can always add or update information later in Configuration Manager and then use WFM synchronization.
- Created and formatted your Workforce Management (WFM) Database using the Database Utility as described in the current *Workforce Management Administrator's Guide*.

Once these activities are complete, you are ready to set up/maintain the WFM Database. Do this by using the Configuration Utility to configure the WFM objects described in this Help file.

This help file:

- Introduces the Configuration Utility interface.
- Describes and explains how to use Configuration Utility's modules, or operational functions:
  - Configuration
  - Policies
  - Data Import/Export
  - Synchronization
  - Security Settings
- Describes and explains how to use Configuration Utility's environmental objects:
  - **Business Unit—**A user-defined collection of sites that you want to track as a single unit.
  - **Site—**A location served by a single switch.
  - **Agent—**A contact center staff member whose activity you are tracking using Genesys Workforce Management.
  - **Team—**A user-defined group of agents to which you can apply certain settings, such as a rotating pattern.
  - **Activity—**Work that is tracked and managed using Genesys Workforce Management. For example, answering inbound calls, responding to e-mail, completing after-call work, performing scheduled callbacks, and participating in chat sessions.
  - **Schedule State Group**—A number of Schedule States combined by the user for adherence tracking purposes. Each Schedule State Group is associated with a Genesys state, such as CallRinging or WaitForNextCall, and an additional aux (reason) code that further identifies what the agent is doing. You can apply start before and start after threshold values to each Schedule State Group, which help you track agent adherence.
  - **Event—**An *event* is associated with, and dependent upon, a factor, and represents a specific instance when one or more factors actually apply. An event is defined by several properties, including the event's actual start and stop date and time as well as the start date and time of the event's projected impact. You can view definitions of all properties in the topic Creating Events.

    A *factor* is any circumstance or phenomenon, inside or outside the contact center, that might be expected to influence one or more activities to a significant degree, such as a holiday shopping season, a special sale, or a stock market rally. Factors are configured using the Events tab.

- **Time Zone**—Time zones are entered into Configuration Manager and brought into WFM during synchronization. You can set a default time zone and configure time offsets such as daylight saving time.
- **Skill**—An capability that enables an agent to perform specific activities. For example, an agent might speak Spanish, specialize in handling billing questions, or work with premier customers.
- **Time-Off Rule**—Setting that determines how much time off of each type an agent accumulates.
- **Contract**—Settings for agent availability times, days off, and overtime that might be union or contractual requirements.
- **Shift**—*Shifts* describe possible work assignments for contact center staff. They are defined by time of day, duration, and days of the week.
- **Exception Type**—*Exception types* define periods of time when workers are engaged in non work activities, such as personal days off or meetings.
- **Meeting**—A specific instance of an exception. For example, you might have a Training exception type and then use that to configure a specific training session, including times and participants.
- **Time Off Type**—Enables you to configure various types of time off and assign time-off rules to them.
- **Marked Time**—Enables you to configure specific types of time periods that should be monitored and reported on. These are periods that do not fall into other categories, such as meetings or other exception types, that are already tracked.
- **Rotating Pattern**—A rotating pattern is a sequence of weekly patterns assigned to an agent, team, or shift. For example, a regular weekly pattern might be Monday through Friday from 9:00 AM to 5:00 PM followed by a short weekly pattern of Tuesday through Thursday from 12:00 PM to 4:00 PM.

Configuration Utility Interface

Configuration Utility Interface Overview

This section introduces the sections of the Configuration Utility main window and explains how to navigate the interface. It contains these topics:

- "Main Window"—Describes the panes in the main window and how to navigate.
- "Menu Bar"—Describes the menus the appear at the top of the main window.

- "Modules Pane"—Describes the area where you select Configuration object categories, rules that governing your contact center that you wish to configure, or Export/Import functions.
- "Objects Pane"—Describes the area that reflects the objects you wish to or have configured.
- "Data Pane"—Describes the area where you enter configuration information.
- "Global Settings"—Enables you to set the week start day and the default time zone.
- "Synchronizing"—Enables you to transfer sites, agents, skills, skill levels, and time zones from the Configuration Database to the WFM Database.

Main Window

The Configuration Utility window has a menu bar and three panes: Modules, Objects, and Data.

The objects shown on the Objects pane and the contents of the Data pane will change depending on the module and object selected. You can resize the main window at any time by hovering your mouse pointer over the side or corner you want to move, and then holding down the left mouse button while dragging the window to the desired size.

Navigation

You can use either a mouse or the keyboard to select objects.

Mouse

To expand a category on the Modules or Objects pane, click it or click its **+** symbol. To use a particular module or object, click it. Many menus are opened by right-clicking an object on the Objects pane, as documented in this Help file.

Keyboard

To move up and down the Modules and Objects panes, use the up and down arrow keys. To expand a category, select it and press Enter or the Space bar. To use a particular module, select it in the tree view and press Enter or the Space bar.

Checking Database Status

To see the program version, database version, database update status, and user name, click **Help** > **About.** If your database requires updating, the necessary update numbers are listed in red in the Database Updates field.

For instructions on how to update your database, see the section on running the Database Utility in the current *Workforce Management Administrator's Guide*.

Menu Bar

When you click the File button, a menu appears with these items:

- **New Window**—Opens a new Configuration Utility window, identical to the first. You can open any number of windows. Changes you make in one window are automatically reflected in all open windows.
- **Exit**—Closes the current Configuration Utility window.

When you click the Actions button, a menu appears with these items:

- **Synchronization**—Opens the Synchronization dialog box that enables you to make the data in your Workforce Management Database the same as that in the Configuration Database. See Manual Synchronization for more information on this feature.
- **Agents Update**—Opens the Agents Update dialog box.

When you select an existing business unit, or a site that does not belong to any business unit, the Actions menu adds additional items:

- **New BU**—Opens the New BU Attributes dialog box for creating a business unit.
- **New Independent Site—**Opens the New Site Attributes dialog box.
- **Edit Independent Site—**Enables you to edit site properties.
- **Delete Independent Site—**After you click **Yes** in a confirmation dialog box, enables you to delete an independent site.
- **Copy Independent Site—**Copies the attributes of the selected site. You can then click where you want to paste the site, right-click, and select **paste <site>** from the context menu.
- **New Team—**Enables you to name and select agents for a new team.
- **Sort by Last Name—**Causes the Objects pane to list agents alphabetically by last name.
- **Sort by First Name—**Causes the Objects pane to list agents alphabetically by first name.
- **Sort by Contract—**Causes the Agents tab on the Data pane to group agents based on their assigned contracts.
- **Sort by Employee ID—**Causes the Agents tab on the Data pane to group agents based on their employee identifier.

When you click the Options button, a menu appears with this item:

- **Global Settings**—Opens the Global Settings dialog box, in which you can set the Default Time Zone and the Week Start Day.

The Help button opens a menu that has these options:

- **Workforce Manager Help—**Opens this Configuration Utility Help. You can also open Configuration Utility Help by pressing F1.
- **About—**Opens a text box that displays the version number of the Configuration Utility, the database version and status, and the user name with which you logged in.

Modules Pane

The Modules pane provides access to Configuration Utility modules. It is located on the upper left side of the main Window.

These are grouped into three main categories: Configuration, Policies, and Data Import/Export. To expand a category, click it or click its **+** symbol. To use a particular module, click it in the tree.

Objects Pane

The Objects pane displays the database objects that you can configure for each module. It is located on the lower left side of the main Window.

Once you have selected a module, navigate to the desired object in the hierarchical objects tree either by clicking an upper-level object, or by clicking its **+** symbol. For example, if you are configuring activity policies:

- The top level of the tree represents a business unit, which may consist of more than one site. You may have multiple business units in your enterprise.
- The second level represents individual sites.

When you have displayed the desired object, click it to display the controls available for that object on the Data pane.

Creating New Objects by Copying and Pasting

You can use this feature to create new objects, such as shifts or contracts, by copying an existing object and then pasting to create a new object with the same configuration as the original. To do this:

1. Right-click an object on the Object pane.
2. Select **Copy** from the shortcut menu that appears.

Note: Meetings can only be pasted into the same site from which they are copied.

3. Select **Paste** from the shortcut menu that appears.
4. Rename the new object and edit the settings as needed.

Data Pane

Once you have selected a module and an object to configure, the Data pane displays controls appropriate to that task. It is located on the right side of the main Window.

Some modules provide multiple tabs; if so, click each tab to display a different set of controls.

- Objects that have been changed but not yet saved in their new state appear in **bold**.
- All windows that show two lists of objects and enable you to move the objects from one pane to the other using the > and < buttons indicate the number of items listed in each pane.

Global Settings

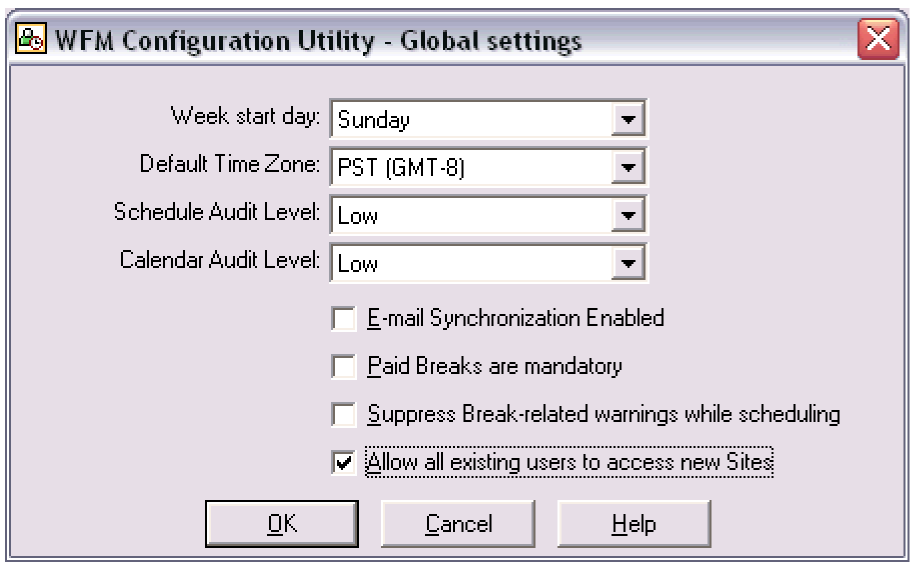


Figure 1: Global Settings Dialog Box

Select `Global Settings` from the `Options` menu to display the Global Settings dialog box. Use it to configure these parameters:

Week Start Day—Use the Week Start Day drop-down menu to set the first day of the week for all of Workforce Management, including the week start day when creating schedules. You can choose from any day of the week or select the <Use Regional Settings> option. If <Use Regional Options> is selected:

- The week start day used for scheduling in WFM Web for Supervisors corresponds to the week start day set on your computer.

Note: Week start day cannot be set directly. It changes by selecting different Regional settings. For example, on Windows XP: Control Panel > Regional and Language Options > Latvian.

- The week start day used in WFM Web for Agents corresponds to the regional settings of the computer running WFM Web Server, not the agents' computers.

Default Time Zone—Use the drop-down menu to select which time zone appears as the default whenever you create a new object that includes a time zone as part of its configuration.

If you do not set a default time zone, you must specify a time zone when you:

- Import a site.
- Create a site or business unit.

Users (Person objects in the Configuration Database) are not required to have a time zone, so the value <none> appears in the Time Zone field for newly imported users if you have not set a default time zone.

- You can configure time zones for users in the User Security Modules tab.

Schedule Audit Level—Select **Low** or **High**. Controls the amount of detail related to Schedule changes that will be stored in the WFM database.

- Use High to store full historical details.
- Use Low to store only the name of the user making the change, what was changed, and the date/time of the change. Low uses less space in the database and gives better performance.

Calendar Audit Level—Select Low or High. Controls the amount of detail related to Calendar changes that will be stored in the WFM database.

- Use High to store full historical details.
- Use Low to store only the name of the user making the change, what was changed, and the date/time of the change. Low uses less space in the database and gives better performance.

E-mail Synchronization Enabled—Use to synchronize e-mail addresses in the WFM Database with those entered for Person objects in the Configuration Database (entered via Genesys Configuration Manager). User (supervisor) and agent e-mail addresses are used for notifications.

Warning! If the WFM Database already contains e-mail addresses, but the Configuration Database does not yet contain them, do not enable e-mail synchronization at this time. This condition will result in e-mail addresses in the WFM database being overwritten with blank e-mail addresses from the Configuration Database.

Paid Breaks are mandatory—If this check box is selected, then paid breaks are mandatory during scheduling. By default, the check box is cleared. For details on this option, see the chapter about scheduling breaks and meals in conjunction with exceptions in the WFM Administrator's Guide.

Suppress Break-related warnings while scheduling—If this check box is selected, then break-related warnings are suppressed during scheduling. By default, the check box is cleared. For details on this option, see the chapter about scheduling breaks and meals in conjunction with exceptions in the WFM Administrator's Guide.

Allow all existing users to access new Sites—Use this check box to specify the assignment of security rights to the users of a newly created site. By default, the check box is selected.

- **Selected—**Security rights to a newly created site are assigned to all of that site's users.
- **Cleared—**Security rights to a newly created site are assigned only to the user who is logged in and performs the creation. If the new site was created under a Business Unit, then all other users retain the same rights (or lack of rights) that they have to that Business Unit.

Synchronizing

Overview

You transfer sites, users, agents, skills, skill levels, and time zones from the Configuration Database to the WFM Database through WFM synchronization.

After manual synchronization, data in the WFM Database is synchronized with that in the Configuration Database.

To update agents only, select Agents Update from the Actions menu.

Besides manual synchronization, you can also import selected objects from the Configuration Database.

While you can manually perform synchronization, dynamic synchronization also occurs.

Notes: Your configuration should not contain duplicate names for switches, time zones, or skills either under different tenants and or in different Configuration Manager instances that access the same WFM database.

You cannot synchronize from a Configuration database that contains no Agent logins. This is a rare situation, which could have these causes:

- There are no Agent logins in the Configuration Database.
- The user who is synchronizing does not have the necessary security permissions in Configuration Manager, to see any Agent logins. For example, if the user cannot see the only Tenant with Agent logins in the Configuration Database, synchronization cannot occur.

Dynamic Synchronization

Data Aggregator receives dynamic updates from Configuration Server regarding changes to existing sites (already imported or transferred to WFM); new and changed agents; and new, existing, and deleted skills.

Please note that dynamic synchronization does not affect non-agents (such as Supervisors) who have been moved into the WFM Users column of the Security Roles/Users main node.

Note: Data Aggregator itself updates only the Site Name.

These dynamic updates are applied only to sites that are associated with the Data Aggregator server that is used for synchronization.

During Synchronization, Data Aggregator (DA) itself updates only associated switch names, which are read-only names from Configuration Manager of existing switches that are associated with a site in WFM. If a site is not associated with any switch, then DA does not update it. Also, DA does not add new sites or make any time zone additions or changes.

To update other objects, such as time zones, perform a complete manual synchronization or import selected objects.

Synchronization Security

For information on how to control synchronization access rights for particular users, see The User Security Modules Tab.

Configuring Sites During Synchronization

If WFM brings in a new site during synchronization, the Configuration Synchronization dialog box opens. Use this dialog box to configure basic parameters for the new site during synchronization.

- If you do not want to import the new site, do not enter any information in the dialog box. Simply click **No.**

To configure the newly imported site:

1. Enter a name for the site. This name must be unique within the WFM environment.
2. Select the time zone for the site.

If you check the Use Last Selected Time Zone for Other New Sites check box, all newly-imported sites are assigned the same time zone by default until you specify otherwise.

3. Select the check boxes for other options you want to use. See the descriptions of these settings below for more information.
4. Click **Yes.**

The site appears with the other sites on the Objects pane after synchronization. For instructions on completing site configuration, see Site Properties.

Unassign Agents If Configuration Manager Login is Deleted—Controls whether WFM should automatically remove agents from the site when their logins to the site have been deleted from the Configuration Database. When you select this check box, an agent is automatically unassigned from the site, and agents without logins are moved to the Unassigned Agents node if:

- An Agent's login ID to this site has been removed.
- This is an independent site and Agents do not have a login ID to this site.

Assign Agents if Logins Are to this Site Only—Controls whether WFM should automatically add agents to the site who are configured in Configuration Manager with logins for this site only. If you clear this checkbox, new agents are added to the Unassigned Agents list, and you must manually add them to the site.

Generate Default Schedule State Groups and Exception Types—Select this check box if you want WFM to create default schedule state groups and exception types. This simplifies and speeds up configuration. You can also add other schedule state groups and exception types.

Configuration Manager

You define Switch, Person (agents and supervisors), Skills, and Time Zone objects in Configuration Manager, which saves them in the Configuration Database.

In the example above, note the Skill set associated with the agent. You use WFM Synchronization to bring Person and assigned Skill information in the Configuration Database into the WFM Database.

IsAgent Field in Configuration Manager

When importing users into WFM, users (non-agents) available for selection have the **Is Agent** check box cleared in the Configuration Manager Properties dialog box.

About the WFM Database

- You create or update the WFM Database schema with the WFM Database Utility. For more on this utility, see the current *Workforce Management Administrator's Guide*.
- You configure the WFM Database with this WFM Configuration Utility.

Configuration Utility Interface > Synchronizing

Importing Selected Objects

You can bring agents, users, time zones, and skills from the Configuration Database into Workforce Management one object or object type at a time.

Importing selected objects requires less processing time and takes up fewer resources than transferring all data at once, as in a complete manual synchronization.

To import:

Agents

1. Click **Organization** on the Modules pane and then select a site.
2. Click **Import** on the Agents tab. Skills are also imported when you import agents. See Associating Agents with a Site for more information.

Skills

1. Click **Skills** on the Modules pane.
2. Click **Import** on the Skills window. Skills are also imported when you import agents. See Skills for more information.

Users (supervisors and other non-agents)

1. Click **User Security** on the Modules pane.
2. Select **Security Roles/Users** on the Objects pane.
3. Transfer users from the Configuration Manager Users list into the WFM Users list. See Users Lists for more information.

Time Zones

1. Click **Time Zones** on the Modules pane.
2. Transfer time zones from the Configuration Manager Time Zones list to the WFM Configuration Utility Time Zones list. See Time Zones List for more information.

Manual Synchronization

You can update all site, time zone, user agent, agent skill, and skill level information in the Workforce Management Database to match what is in the Configuration Database in a single step.

To do so:

1. Click **Actions** on the menu bar at the top of the Configuration Utility window.
2. Select **Synchronization** from the menu.

The WFM Configuration Utility Synchronization dialog box opens.

3. Click **Start** to initiate the synchronization.
4. Click **OK** to confirm that you want to synchronize. When synchronization completes, the Synchronization window displays the results.

Note:

Manual synchronization overrides the daylight saving settings you have configured for time zones unless you selected **Do Not Synchronize** when you configured your daylight saving offset. See Configuring Time Zones for this procedure.

Synchronization can affect an agent's time-off accrual. This occurs if agents with time-off rules for one or more types of time off are transferred to a different site during synchronization. The time-off rules remain associated with the agents, but they are no longer active. You must manually assign time-off rules configured for the new site to the agents. At this point, the agents' carry-over for each time-off type is calculated, and the new time-off rules take effect.

Configuration Manager Security

Synchronization affects only objects that are accessible to the user in a tenant-based Configuration Manager environment. The WFM user must have tenant-based permission in Configuration Manager (and of course, permission in WFM) in order to synchronize these changes to these objects:

- Creation of the site; updates to a name of associated switch, or unassignment of the site from the switch.
- Creation or deletion of a skill, updates to a skill name.
- Creation or termination of an agent; updates to an agent's first name, last name, employee ID, e-mail address, skills.

Synchronization can import changes to an agent's data that were made in Configuration Manager including the agent's creation or termination only if the WFM user has tenant-based permission in Configuration Manager. To avoid varying synchronization results and inadvertent changes to the WFM database, Genesys recommends that you always perform manual synchronization using the same administrator account or accounts with the same set of permissions in both Configuration Manager and WFM.

Tenants exist only in a multi-tenant environment. For details about tenants, see the Framework 7.6 Configuration Manager Help topic `Configuration Database Objects > Resources / Tenants > Tenant Object Overview`.

Chapter

2 Configuration

This chapter covers the following topics:

Overview

The Configuration modules enable you to configure basic objects for your contact-center site.

A new installation (one not migrated from a previous release of Workforce Management) requires you to perform certain steps before all functions are active.

Import users in the User Security module and set their access rights. See the User Security Help pages for more detailed instructions.

Restart the WFM Configuration Utility

Log on as a user with security rights to synchronize your new WFM Database with the Configuration Database.

Perform a complete synchronization. To do so, select **Actions > Synchronization** from the menu bar.

Users, agents, skills, time zones, and the switches you chose to import are now available in the WFM Database. You can now begin your WFM-specific configuration.

Note: If you do not do perform a full synchronization before using the WFM Configuration Utility, you will encounter issues, such as the fact that you cannot create a site unless you have imported at least one time zone.

The Modules Tree

In the Configuration Utility's Modules tree, the Configuration category contains the following functions that you can apply to configuration objects:

User Security—Enables you to configure security roles and set security rights for Workforce Management users.

Organization—Enables you to configure objects that are units within the organization, such as business units, sites, teams, and agents.

Activities—*Activities* are work that is tracked and managed using Genesys Workforce Management. For example, answering inbound calls, responding to e-mail, completing after-call work, performing scheduled callbacks, and participating in chat sessions. Use this module to configure activities; and, for each activity, to configure which statistics are tracked for specific objects, such as Agents, Places, and Queues.

Schedule State Groups—Enables you to configure a groups including a number of schedule states. You use these groups for adherence tracking. Each schedule state group is associated with a Genesys state, such as CallRinging or WaitForNextCall, and can be associated with an additional reason (aux) code that further identifies what the agent is doing. You can apply start before and start after threshold values to each schedule state group, which help you track agent adherence.

Events—Enables you to configure *factors* and *events*. Use these to fine-tune forecasts by indicating periods when the forecast values generated from historical data or from a forecast template would not accurately reflect the expected activity level. An *event* is associated with, and dependent upon, a factor, and represents a specific instance when one or more factors actually apply. An event is defined by several properties, including the event's actual start and end date and time as well as the start date and time of the event's projected impact. You can view definitions of all properties in the topic Creating Events.

A *factor* is any circumstance or phenomenon, inside or outside the contact center, that might be expected to influence one or more activities to a significant degree, such as a holiday shopping season, a special sale, or a stock market rally. Factors are configured using the Events tab.

command—Enables users with the correct security access to configure time zone and daylight saving settings.

Skills—Lists all skills configured in Configuration Manager and enables you to import the skills you need into Workforce Management. After you import skills, you can assign them to activities.

User Security

Overview

Note: The term *User* refers to supervisors and other persons who are not agents.

The User Security module allows you to configure user security access permissions to various modules, functions, and objects in WFM Web for Supervisors.

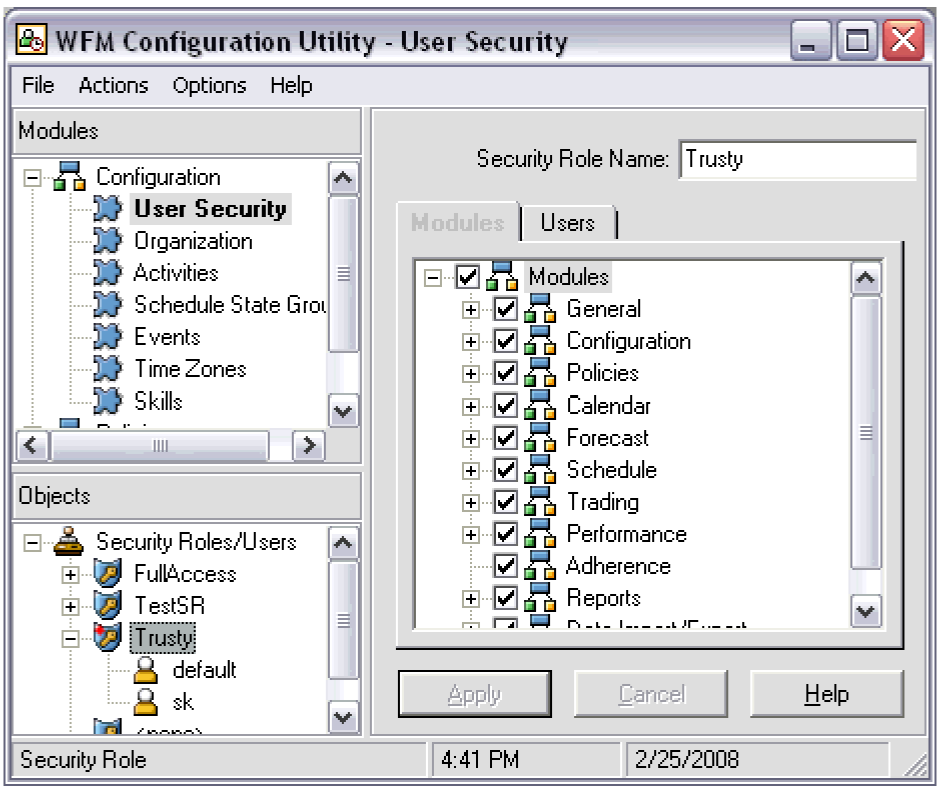


Figure 2: User Security Module

The User Security module shown below enables you to configure user security access permissions to various modules, functions, and objects in WFM Web for Supervisors. Use these links to learn the details about:

- “Importing Users” on page 30
- “Default Security Role” on page 29
- “Creating Security Roles” on page 29
- “Assigning Security Roles to Users” on page 33
  The users automatically take on the permissions configured for the Security Role to which they are assigned.
- “Editing Security Roles” on page 51.

Note: Security Roles enable you to set permissions for access to modules but not to business units, sites, or teams. To add or restrict access to these specific objects, select a user and then configure the Objects tab settings.

Configuration Manager Security

The Genesys security setup in Configuration Manager also applies to WFM. For example, If a user logging into the Configuration Utility does not have permission to view certain objects/users in the Genesys Configuration Layer, that user will also not be able to view those objects/users in the Configuration Utility.

A user's ability to see, interact with, and synchronize agents and skills in WFM 7.6.1 matches that user's tenant-based access permissions in the Genesys Configuration Layer.

In other words, in order to access an agent or a skill in WFM, you must be able to do it in Configuration Manager. The agent can be assigned or unassigned.

This access permission is tenant-based. If you are working in a multi-tenant environment, this behavior affects every display of agents or skills in WFM.

Tenants exist only in a multi-tenant environment. For details about tenants, see the Framework 7.6 Configuration Manager Help topic Configuration Database Objects > Resources / Tenants > Tenant Object Overview.

Migrating Security Settings

If you are migrating from an earlier version of WFM 7.x, users are imported with the same security settings as they had previously.

Note: If the security settings have been broken down into more specific functions, users who had access to the functionality in the prior version keep the same permissions. However, in some cases you may want to adjust the security settings to take advantage of the increased granularity.

For example, users who had permission to edit the Calendar now have permission to Add/Edit/Delete items and to Prefer/Grant/Decline items. You can change the security settings to allow one set of calendar modification settings but not the other.

Creating Security Roles

Security Roles control general permissions, as well as permissions to access various modules in WFM Web for Supervisors. Security Roles do not control access to business units, sites, or teams. To add or restrict access to these specific objects, select a user and then configure the Objects tab settings.

To create a new Security Role:

1. Click `User Security` on the Modules pane.
2. Right-click `Security Roles/Users` or any existing Security Role on the Objects pane.
3. Select **New Security Role** from the shortcut menu.
4. Enter **Security Role Name** at the top of the Data pane as shown below.
5. Specify the Security Options in the Modules tab by expanding items on the tree and selecting/clearing boxes.
6. If users have already been imported, complete the Users tab. Select users under Available Users (users who have already been imported into WFM) and click the < button.
7. Click **Apply**.
8. Optional: Define the new security role as the Default Security Role. See below.

Default Security Role

To define the Default Security Role:

1. Select User Security in the Modules pane, and Security Roles/Users in the Objects pane.
2. (Optional) Create a new Security Role in the Objects pane.

3. Select a Security Role from the Default Security Role drop-down list at the top of the Data pane.

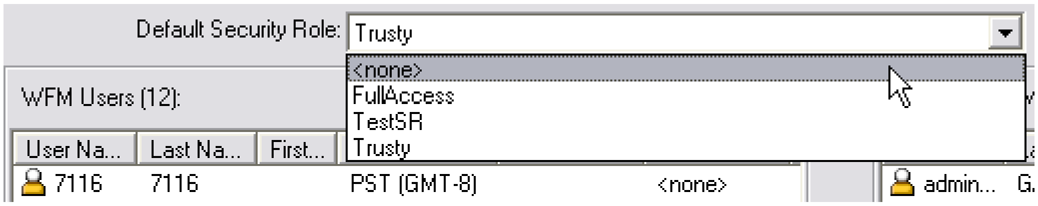


Figure 3: Selecting a Default Security Role

As a result of this procedure:

- The selected role becomes the Default Security Role when you create or import a new user.
- The upper-left corner of the Default Security Role icon is red.

Importing Users

To see the Users lists:

Open the User Security module and select **Security Roles/Users** on the Objects pane.

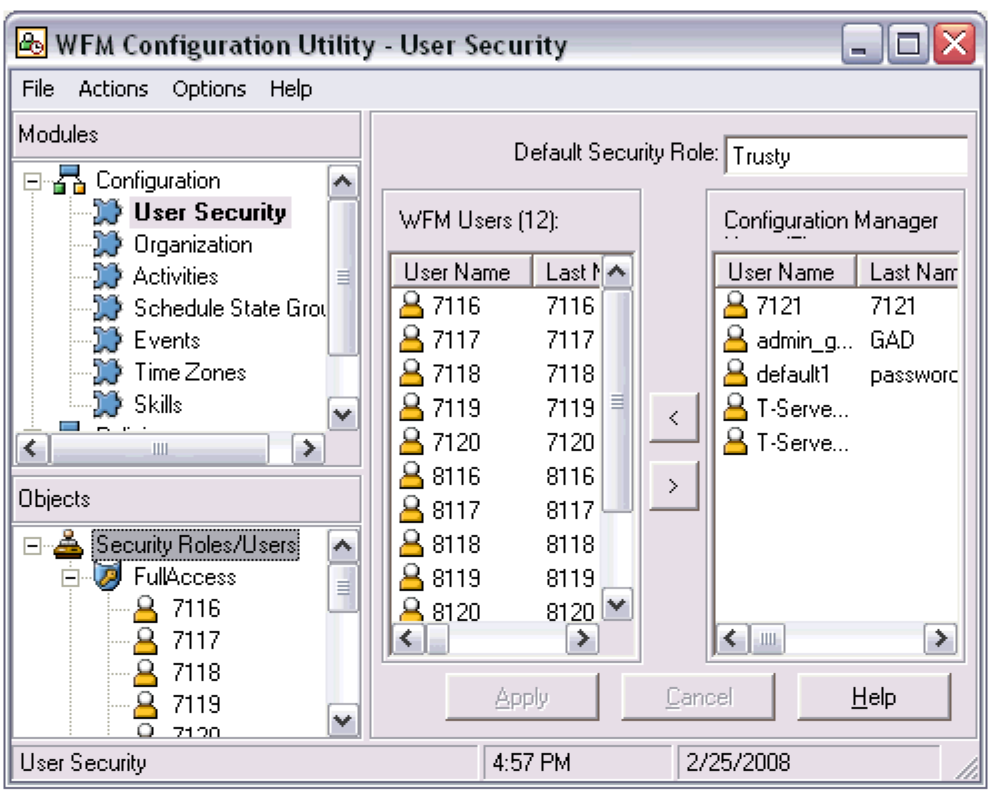


Figure 4: Security Roles/Users in the Data Pane

The Data pane lists all users defined in Configuration Manager. Users are divided into two groups:

Users who have already been imported into WFM.

Users who were configured in Configuration Manager but not selected as WFM users. Users available for selection under the Configuration Manager list have the Is Agent check box cleared in the Configuration Manager Properties dialog box.

Sorting User Lists

Both the WFM and the Configuration Manager User lists contain the same sortable columns: User Name, Last Name, First Name, E-mail, Time Zone, WFM Builder, and Security Role. Click a column header to sort the column differently.

Importing Users Into WFM

To bring a user into WFM:

1. In the Configuration Manager column, select the user name.
2. Click the < button. The user is placed under <none> indicating a Security Role has not been assigned. See Configuring Access for New Users.

Warning! New users are automatically granted access to all modules, objects, and sites as described in the Security Options topic.

Removing a User

To remove a user:

1. Under WFM Users, select the user name.
2. Click the > button.
3. Click **Apply**. The following message appears:

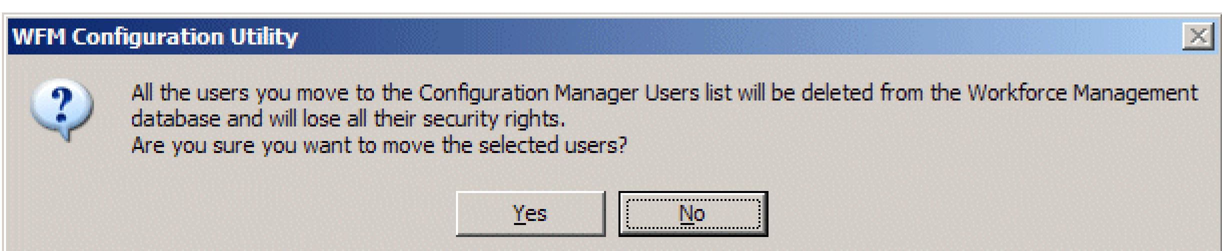


Figure 5: Removing a User Confirmation Message

Configuring Access for New Users

To configure access for newly imported users:

1. Locate and select a newly imported user on the Objects pane under <none>.

Last Name and First Name carry over from Configuration Manager. E-mail carries over if e-mail synchronization is enabled in Global Settings.

2. Complete the Time Zone, WFM Builder, and Security Role fields at the top of the Data pane. The Security Role field allows you to specify an already-configured Security Role or <none>. If you select a Security Role, the user takes the security permissions configured for the role, but you can edit. See Editing Security Roles for more information.

If you do not select an already configured Security Role:

3. Select the appropriate check boxes on the Modules and Objects tabs.
4. Click **Apply**.

Notes:

In Configuration Manager, it is possible to restrict access (using security permissions) to objects, including Person objects. If you do not see a particular user in WFM under the Configuration Manager heading, check that Person object's Configuration Manager security settings.

After you create a new Person object in Configuration Manager, you must refresh the WFM Users list. Do this by selecting any other Configuration Utility module and then re-selecting the User Security module.

Only users in the WFM Users list can use Workforce Management functionality (with the exception of WFM Web for Agents).

Assigning Security Roles to Users

To assign a Security Role to a user:

1. Click **User Security** on the Modules pane.
2. Expand **Security Roles/Users** on the Objects pane.
3. Select a Security Role on the Objects pane.
4. Select a user on the Objects pane.

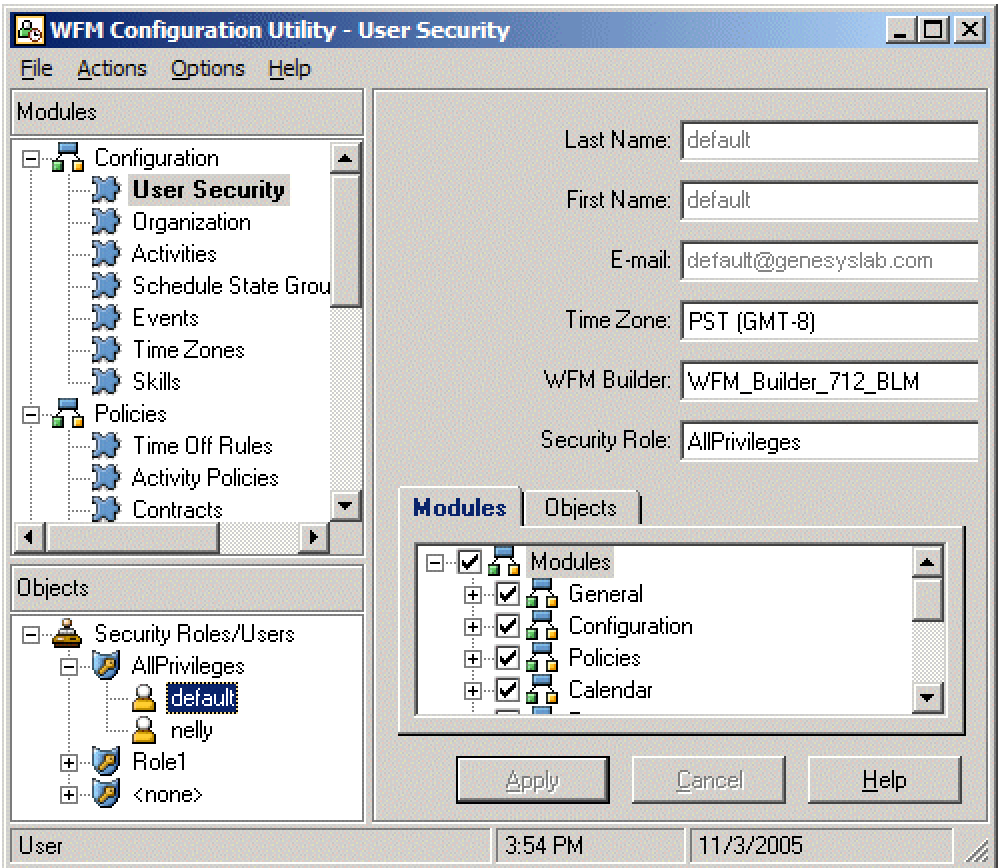


Figure 6: Selecting a User from the Objects Pane

Note: Only users who have been imported into WFM from Configuration Manager appear on the Objects pane.

Edit the user fields at the top of the Data pane, which can include assigning a Security Role or selecting **<none>.** If you select a security role, the user takes the security permissions configured for the Security Role, but you can edit them. See Editing Security Roles for more information.

5. Complete the Modules tab.

6. Complete the Objects tab.

7. Click **Apply**.

User Security Modules Tab

The Data pane containing the Modules tab shows different fields depending on whether you select a Security Role or a user. The figures below show the

Modules tab in the Data Pane, and how it looks when you select a Security Role or a User in the Objects pane.

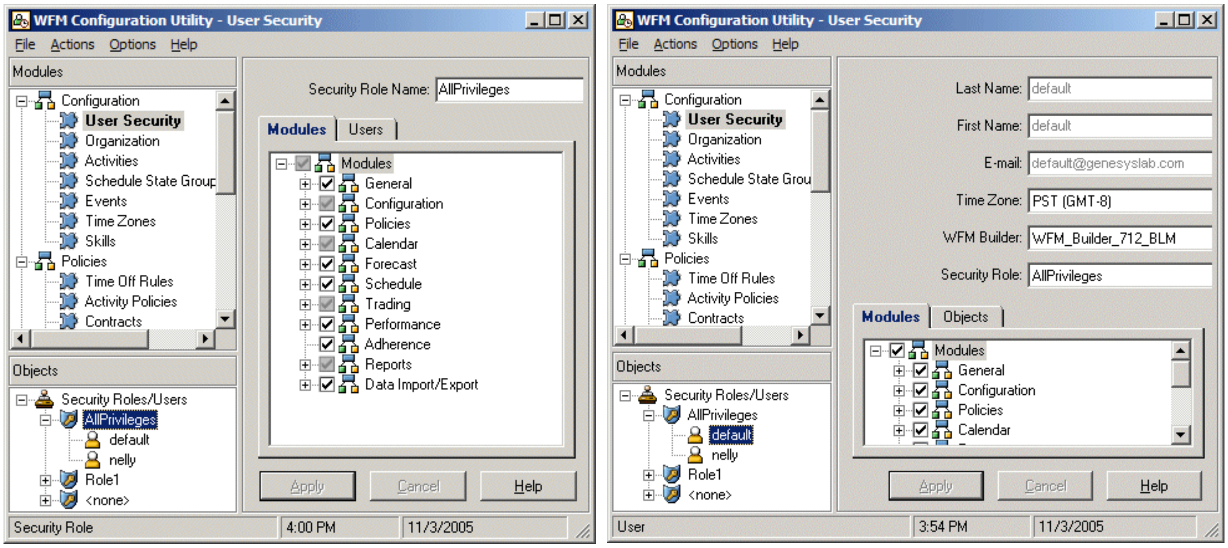


Figure 7: Modules Tab. On the left, a Security Role is selected. On the right, a User is selected.

The top of the Data pane contains the following read-only fields, previously entered in Configuration Manager:

- **Last Name** for the user as entered in Configuration Manager.
- **First Name** for the user as entered in Configuration Manager.
- **E-mail**. This is the user's e-mail address entered in Configuration Manager. WFM uses this e-mail address for notification of:
  - Changes in the status of schedule trade requests.
  - Changes in the status of time-off requests.

For more on e-mail notifications, see the *Workforce Management Administrator's Guide*.

Configuring User Fields in the Modules Tab

To configure the Modules tab when a user is selected in the Objects pane:

1. Select **Time Zone** for the user or leave blank.

Time zone can be used in some Performance views and reports as an alternative to the site or business unit time zone. If you configured a default time zone before importing the user, that time zone appears as the Time Zone. If you did not configure a default time zone, <none> appears here.

Note: If you subsequently changed the default time zone, the time zone set as default when the user was imported appears here.

2. To set a different time zone for this user:

   Select the time zone from the drop-down list box. All time zones that have been imported into Workforce Management from the Configuration Database are included.

   If you need additional time zones, use the Time Zones module to change the time zones that appear in the drop-down list. See Time Zones List for details.

   See Global Settings for more information about the default time zone.

3. Select **WFM Builder** for the user or leave blank. This is the server that builds schedules. To use a specific WFM Builder (one that is installed on a user's workstation or dedicated to a group of users) to create WFM schedules:

   Select the WFM Builder from the drop-down list box.

   You do not need to specify a WFM Builder if you want all users to share the same WFM Builder server. The default value is *None*.

4. Select **Security Role** for the user or leave blank. If you select a Security Role, the user adopts the Security Options that you configured for that Security Role. If the user is not assigned to a Security Role:

   Clear the check boxes next to the names of the Security Options the user should *not* have permission to access. By default, all options are selected.

5. Click **Apply**.

Assigning Security Options in the Modules Tab

To edit/assign Security options in the Modules tab for a user:

1. In the Modules tab, clear the check boxes next to the names of the functions the user should *not* be able to access. By default, all functions are selected.
   - To further refine your settings, expand the tree nodes so their contents show.
   - To clear all selections, clear the check box at the top of the Modules tree.
   - To select all contents of a category, select the check box next to the category name.
   - To remove access, clear the check box next to the function or object.
   - In some cases, such as for the Calendar module, you can choose whether users can have read-only access or can make edits. For the Forecast and Schedule modules, you can also choose to have users view scenarios without being able to edit them.

- In the Schedule module, you can enable a user or security role to have permission to make only pending changes to the schedule (permission to Edit Master). A user with Approve Changes permission in the Schedule module can then review the pending changes and approve or decline them.

2. Click **Apply.**

Note: If you selected a Security Role above, editing the Security Options associated with the role unassigns the role. This is because the role no longer fits the WFM Database definition. After you edit and click Apply, the Configuration Utility displays a notification message:

```
Changing any security rights to the Modules will automatically
unassign Security Role.
```

Security Options in Modules Tab

Overview

The User Security Modules tab displays an extensive list of modules and objects to which you can control access. The same Modules tab appears when you select a Security Role or a user on the Objects pane. The figure below shows the Modules tab when you select a user on the Objects pane.

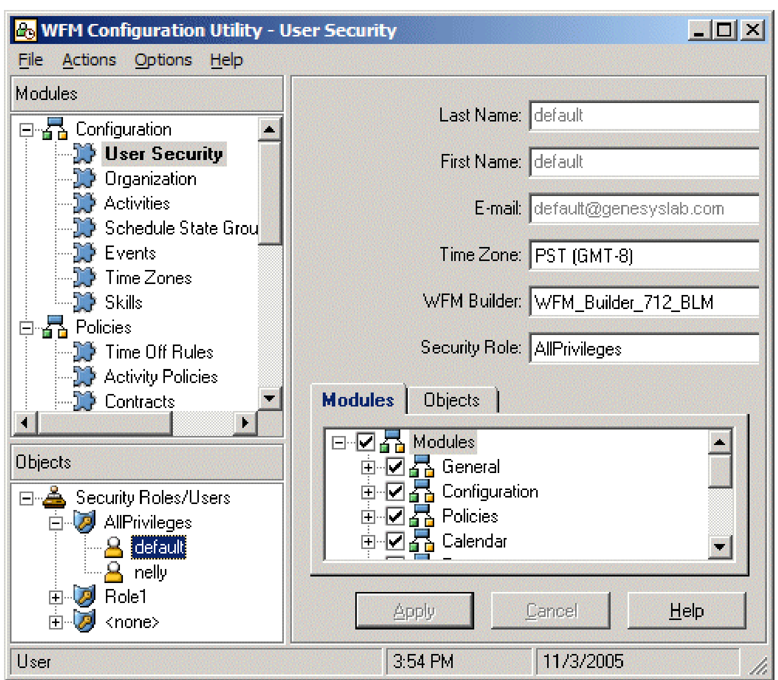


Figure 8: User Security Modules Tab with a User selected

New users are automatically granted access to all modules, objects, and sites as described in the Security Options topic. See also:

- General Security Options, page 38
- Configuration Security Options, page 39
- Policies Security Options, page 40
- Calendar Security Options, page 40
- Forecast Security Options, page 41
- Schedule Security Options, page 43
- Trading Security Options, page 44
- Performance Security Options, page 45
- Adherence Security Options, page 46
- Reports Security Options, page 46
- Data Import/Export Security Options, page 48
- User Security Users Tab, page 48

General Security Options

The figure below shows the items under General in the User Security Modules tab when a User is selected in the Objects pane. The same options are listed when a Security Role is selected.

Check **Show agent wage field** to give permission to view the Hourly Wage field on the Agent Information tab in the Organization window. It also controls whether the user will see agent wage information in the Agent Properties report.

Check **Show unassigned agents** to control whether unassigned agents appear in all lists where agents appear. Examples: Lists where you assign agents to teams and lists where you assign agents to rotating patterns.

> Any unassigned agents are contained in an Unassigned Agents folder in the Objects pane when you select Organization on the Modules tab.
>
> New agents without logins (or with logins to multiple switches) are imported by synchronization even if the Show unassigned agents option is turned off for the user who triggers synchronization although they are not visible to this user.
>
> The only security for these new agents is tenant security.

Check **Allow Backup/Restore** to give permission to use the WFM Database Utility to perform backups and restores. If cleared, the user cannot log into the Database Utility. For more information on this utility, see the current *Workforce Management Administrator's Guide*.

Check **Allow to modify Daylight savings settings** to enable the Daylight Savings button on Properties tab for the selected Organization for this user.

Check **Allow to modify Global settings** to give permission to open Global Settings dialog box from Options menu.

Configuration Security Options

The graphic below shows the items under Configuration in the User Security Modules tab when a User is selected on the Objects pane. The same options are listed when a Security Role is selected.

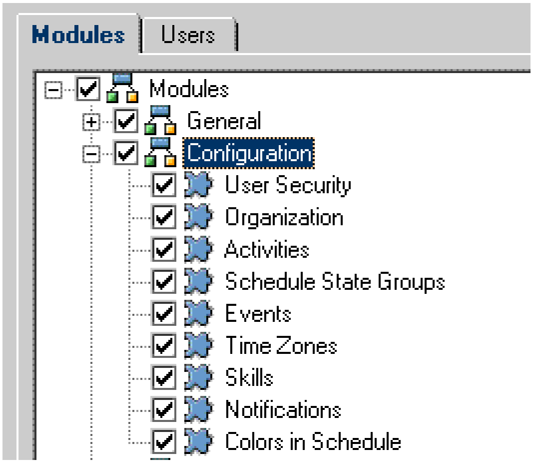


Figure 9: Configuration Security Options

The Configuration items are all Configuration Utility modules. Select the check box next to each item to give permission to configure:

- User Security
- Organization
- Activities
- Schedule State Groups
- Events
- Time Zones
- Skills
- Notifications controls whether this user has access to the Notifications module in the Configuration subsystem of WFM Web for Supervisors. Users with this permission can modify the configuration of e-mail notifications.
- Colors in Schedule allows Supervisors to configure custom colors for elements in the schedule. See the topic Configuring Colors Overview in the current *Workforce Management Web for Supervisors Help.*

Policies Security Options

The figure below shows the items under Policies in the User Security Modules tab when a User is selected on the Objects pane. The same options are listed when a Security Role is selected.

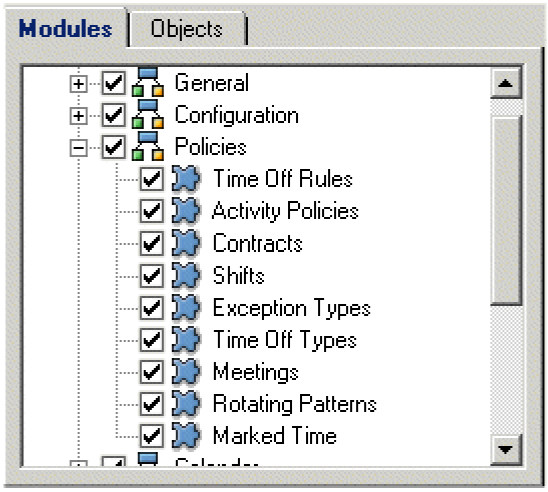


Figure 10: Policies Security Options

The items under Policies are all Configuration Utility modules. Select the check box next to each item to give permission to configure:

- Time Off Rules
- Activity Policies
- Contracts
- Shifts
- Exception Types
- Time Off Types
- Meetings
- Rotating Patterns
- Marked Time

Calendar Security Options

The figure below shows the items under Calendar in the User Security Modules tab when a User is selected on the Objects pane. The same options are listed when a Security Role is selected.

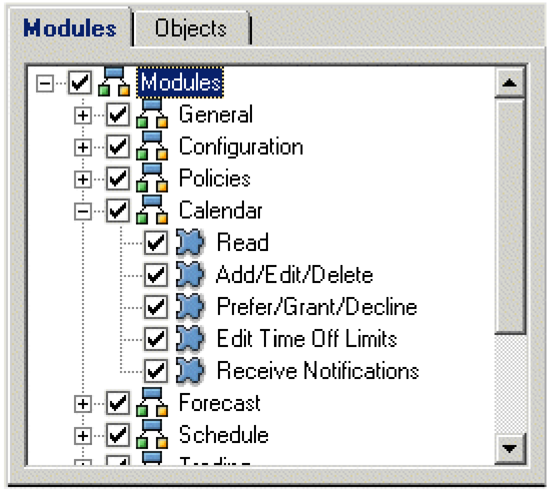


Figure 11: Calendar Security Options

- Select **Read** to give permission to view the Calendar module in WFM Web for Supervisors.
- Select **Add/Edit/Delete** to give permission to view, add, and edit agent preferences and exceptions in the Calendar module.
- Select **Prefer/Grant/Decline** to give permission to grant or decline agent preferences in the Calendar module.
- Select **Receive Notifications** to have this user receive e-mail notifications when there are agent time off requests that require manual review.

For more information on Calendar functions, see the current *Workforce Management Web for Supervisors Help.*

Forecast Security Options

The figure below shows the items under Forecast in the User Security Modules tab when a User is selected on the Objects pane. The same options are listed when a Security Role is selected.

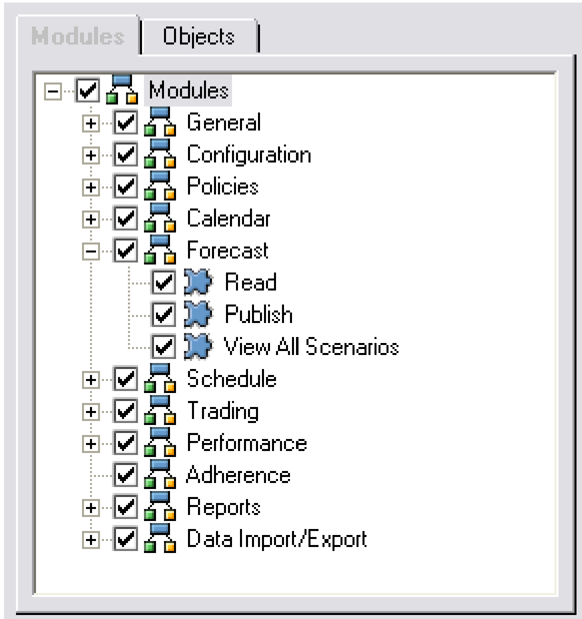


Figure 12: Forecast Security Options

Check **Read** to give the user permission to:

- Create Forecast Scenarios.
- View and edit shared Forecast Scenarios.
- View the Master Forecast.
- Extract the Master Forecast to their own or shared Scenarios.
- View Historical Data.

Check **Publish** to give all Read permissions plus permission to publish to the Master their own or shared Forecast Scenarios.

Check **View All Scenarios** to give all Read permissions plus permission to:

- View, edit and share all Forecast Scenarios.
- Extract from the Master Forecast to all Scenarios.

Check Edit Historical Data to give all Read permissions plus permission to:

- Edit historical data to be used when creating a forecast scenario.
- Copy/paste historical data to/from Excel.

Check Events to give all Read permissions plus access to all Overlays functionality in the WFM Web Supervisor Forecast module.

For more information on Forecast functions, see the *Workforce Management Web for Supervisors Help.*

Schedule Security Options

The figure below shows the items under Schedule in the User Security Modules tab when a User is selected on the Objects pane. The same options are listed when a Security Role is selected.

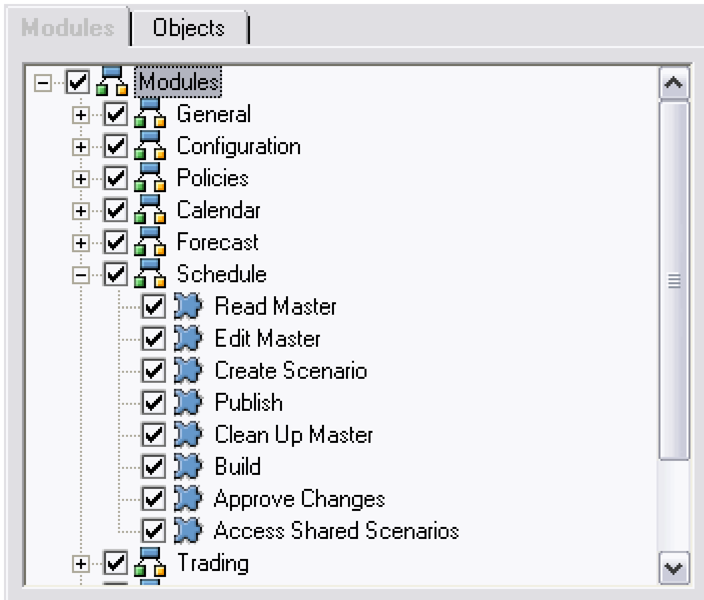


Figure 13: Schedule Security Options

The items under Schedule all refer to the Schedule module in WFM Web for Supervisors. Select the check box next to each item to give permission to perform that action.

Check **Read Master** to give permission to view and extract data from the Master Schedule, but not publish to the Master Schedule. (See the special note below.)

Check **Edit Master** to give the user permission to edit the Master Schedule.

Check **View All Scenarios** to give the user permission to view all scenarios.

Check **Create Scenario** to give the user permission to create scenarios.

Check **Publish** to give the user permission to publish scenarios to the Master Schedule.

Check **Clean Up Master** to give the user permission to clean up the Master Schedule.

Check **Build** to give the user permission to build schedules.

Check **Approve Changes** to give the user permission to access the Changes Approval Module, to approve or decline pending changes in schedules that you or others have made.

Check **Access Shared Scenarios** to give the user permission to access all schedule scenarios that are marked as Shared.

Special Note on Read Master

Check **Read Master** to give permission to view and extract data from the Master Schedule, but not publish to the Master Schedule. Use the remaining check boxes under Schedule to give additional permissions.

When Read Master is selected, the user can:

- Extract data from the Master Schedule to an owned or shared Schedule Scenario.
- View their own Schedule Scenarios and/or other Schedule Scenarios designated as "shared" by the creator.

  About Scenarios: When working in WFM Web for Supervisors, you can build multiple Schedule Scenarios that may contain different agents, different types of shifts or rotating patterns, etc. You will eventually decide to publish all or part of one of these Scenarios to the Master Schedule.

Note: The following side effect occurs when you select Read Master for a user, but do not select Publish: When that user works in My Scenarios or Shared Scenarios, a Publish button is available. However, unless you have checked Publish, clicking the Publish button only enables the user to extract data.

For more information on Schedule functions, see the *Workforce Management Web for Supervisors Help*.

Trading Security Options

The figure below shows the items under Trading in the User Security Modules tab when a User is selected on the Objects pane. The same options are listed when a Security Role is selected.

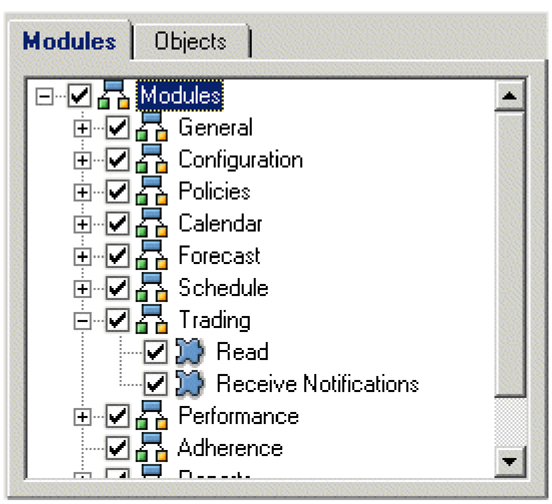


Figure 14: Trading Security Options

Select **Read** to give permission to access trading information in WFM Web for Supervisors.

Select **Receive Notifications** to have this user receive e-mail notifications when there are agent trade requests that require manual review.

For more information on Trading functions, see the *Workforce Management Web for Supervisors Help*.

Performance Security Options

The figure below shows the items under Performance in the User Security Modules tab when a User is selected on the Objects pane. The same options are listed when a Security Role is selected.

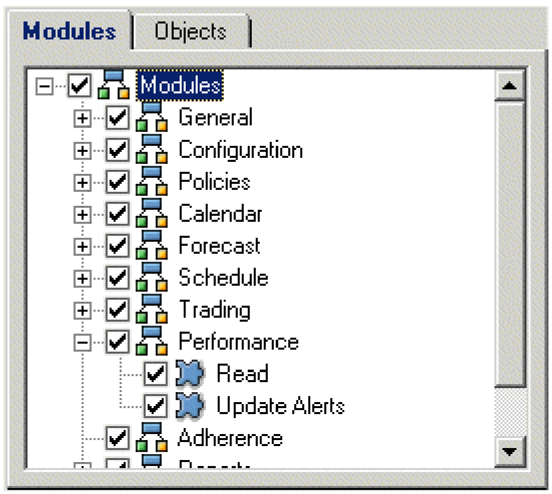


Figure 15: Performance Security Options

Select **Read** to give permission to access Performance information in WFM Web for Supervisors. All users who have Read permission for the Performance view can see these alerts when the configured thresholds have been exceeded.

Select **Update Alerts** to give permission to modify alert thresholds and save changes in the Alerts view in the Performance module where users configure thresholds for each metric.

> **Background:** The Alerts function in WFM Web for Supervisors uses Master Forecast and Schedule data as a baseline for acceptable performance results. If user-defined performance limits are violated (for example, if too many interactions are being abandoned, or if service levels fall too low), an Alert warning in the Monitor view notifies that action may be necessary.

For more information on Performance, see the *Workforce Management Web for Supervisors Help*.

Adherence Security Options

The figure below shows the User Security Modules tab when a User is selected on the Objects pane. The same options are listed when a Security Role is selected.

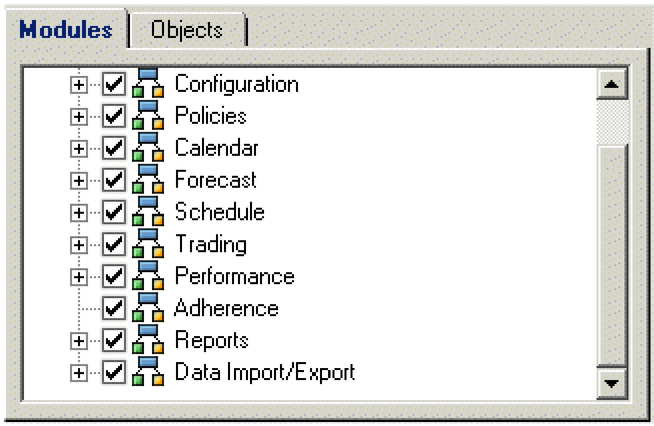


Figure 16: Adherence Security Options

Select **Adherence** to give this user permission to access the Adherence module in WFM Web for Supervisors, which monitors real-time agent adherence to the schedule.

For more information on Adherence, see the *Workforce Management Web for Supervisors Help.*

Reports Security Options

The figure below shows the items under Reports in the User Security Modules tab when a User is selected on the Objects pane. The same options are listed when a Security Role is selected.

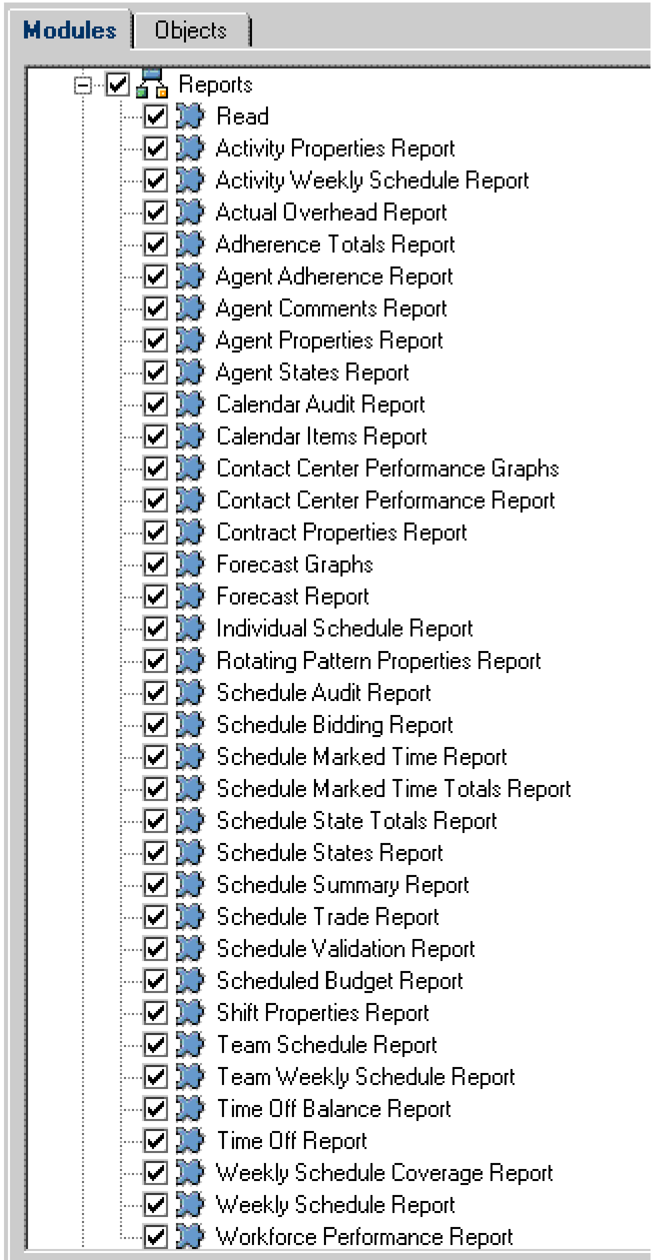


Figure 17: Reports Security Options

Select the check box next to a report to give permission to create that report.

For more information on Reports, see the *Workforce Management Web for Supervisors Help.*

Data Import/Export Security Options

The figure below shows the items under Data Import/Export in the User Security Modules tab when a User is selected on the Objects pane. The same options are listed when a Security Role is selected.

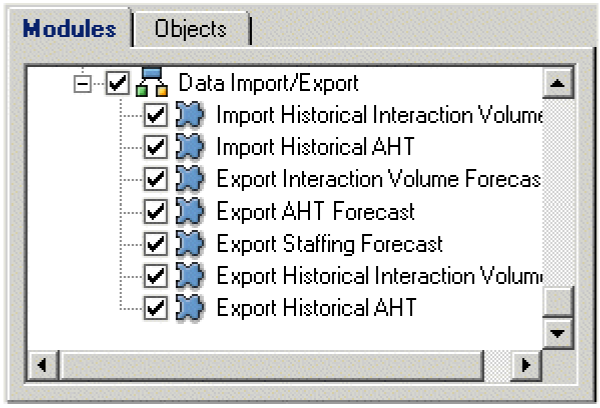


Figure 18: Data Import/Export Security Options

Select the check box next to an item to give the user permission for that action.

For more information on the Data Import/Export functions, see the current *Workforce Management Web for Supervisors Help.*

User Security Users Tab

The Modules and Users tabs appear when you select a Security Role on the Objects pane. By default, the Modules tab is on top. To associate users with a Security Role:

1. Click the Users tab. The figure below shows an example of a Users tab.

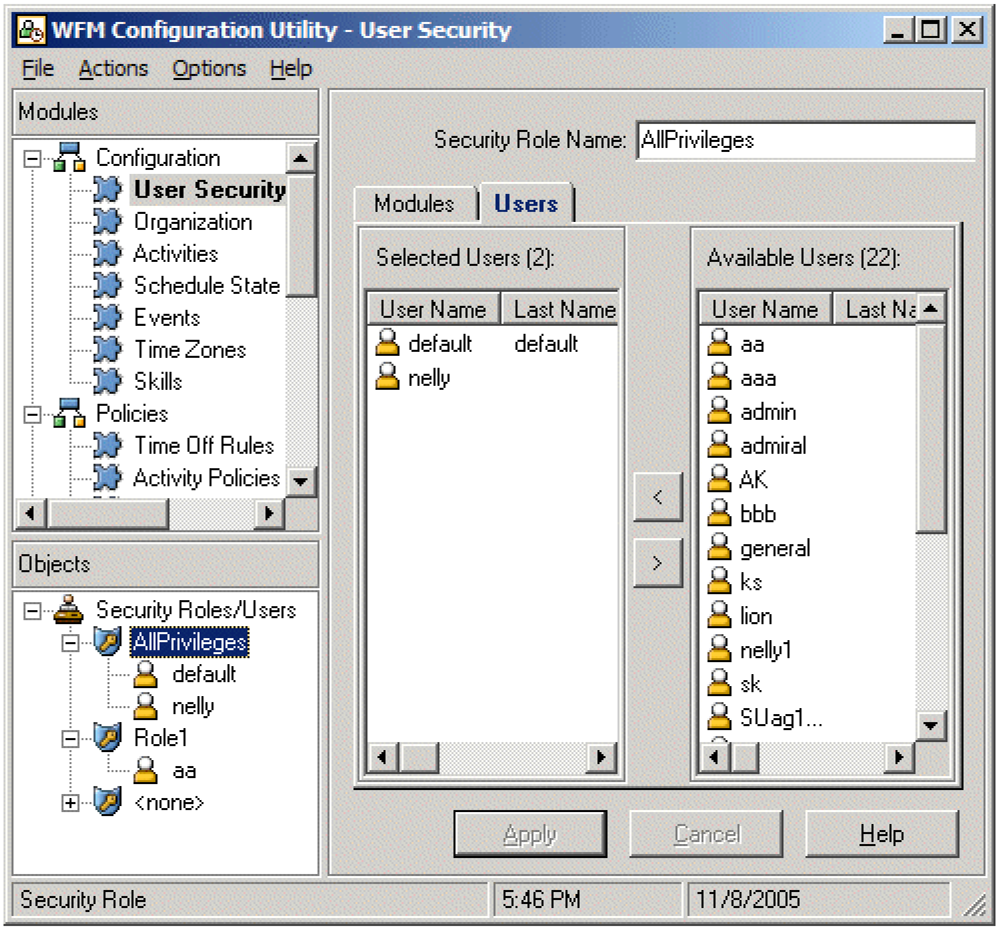


Figure 19: User Security Users Tab

This tab contains two lists, Selected Users and Available Users. The *Selected Users* are those who have already been assigned to the Security Role you have selected.

Note: The columns in the Users lists are sortable. To sort by any of these columns, click the column header.

---

2. Select users from the Available Users list. You can select one user or multiple users.

3. Click < to assign the users to the Security Role. They are transferred to the Selected Users list.

4. To remove Security Role assignments, select users on the Selected Users list and then click >**.**

If you unassign a user from a Security Role by selecting <none>, the user retains the access permissions configured for that Security Role unless you change them.

User Security Objects Tab

The User Security Objects tab appears when you select a user on the Objects pane and select the Objects tab. The tab displays a list of the business units, sites, and teams in the Enterprise to which you can control access. The figure below shows an example Objects tab.

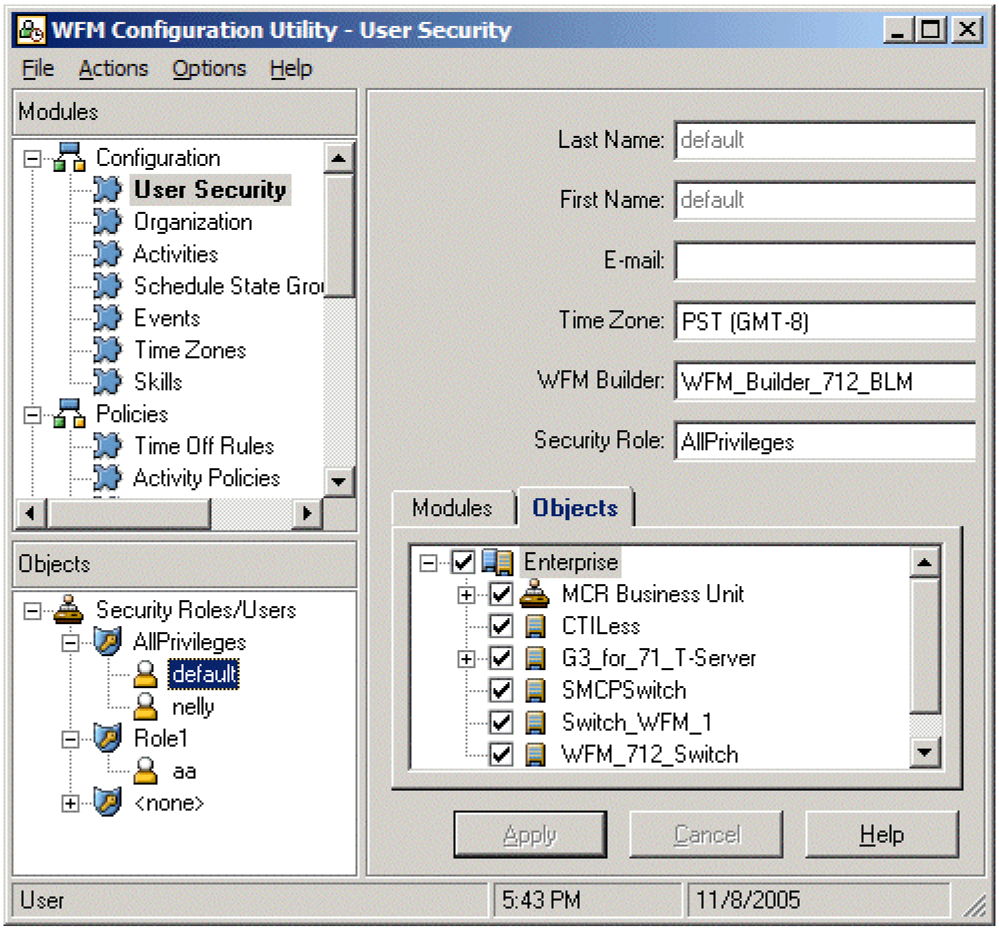


Figure 20: User Security Objects Tab

To enable access to an object:

1. Select the check box next to the object name. By default, all objects are selected.
   - To clear all selections, clear the check box at the top of the Objects tab.
   - To select all teams within a site, select the check box next to the site name.
   - To remove access, clear the check box next to the object.
2. Click **Apply.**

Note: If you select the check box for a site but do not select the business unit, the user can see objects included in the business unit but can only make changes to the site for which he or she has access.

If you select the check box for a team but do not select the site or business unit to which the team belongs, the user can see the site or business unit objects but cannot edit them.

Notes on Restricted Access

- If you select the check box for a site but you do not select the business unit, you can see objects included in the business unit but can only make changes to the site for which you have access.
- If you select the check box for a team but you do not select the site or business unit to which the team belongs, you can see the site and business unit in the objects pane but you cannot view or edit their properties, or update their properties via synchronization.

  This restriction affects Agent Assignments rules in the synchronization process:
  - Synchronization that is triggered by a user with restricted access to a site will disregard that site's Agents Assignment settings, and no agents will be assigned to the site.

If the Configuration Manager logon has been deleted, selecting Unassign Agents moves all agents assigned to this site to the Unassigned Agents node including agents who belong to an inaccessible team.

Editing Security Roles

You can edit a Security Role definition or edit the specific Security Options assigned to a user.

Editing a Security Role

To edit a Security Role or to add users to it:

1. Select the Security Role on the Objects pane.
2. Use the Modules tab to specify Security options.
3. Click the Users tab to assign users to the Security Role.

All users assigned to the Security Role take on the Security Role settings.

Note: You must configure access to business units, sites, and teams separately for each user. By default, users can view information for all these objects.
If you adjust the modules settings for a user who is assigned to a security role, the Security Role assignment disappears, and the user is moved under <none> on the Objects pane.

Editing User Security Options

To edit the Security Options assigned to a user:

1. Select the user in the Objects pane. The Data pane shows the user's security information:
2. Select/clear the Security Option boxes on the Modules tab. If you change the Security options associated with a Security Role, the following error message appears:
3. Select/clear the check boxes on the Objects tab.
4. Click **Apply**.

Other Security Role Operations

To copy a Security Role:

1. Select the Security Role on the Objects pane.
2. Right-click and select **Copy Security Role.**
3. Right-click any existing Security Role or Security Role/Users object on the Objects pane and select **Paste New Security Role Copy.**

   The copied Security Role appears in the Security Roles/Users tree.

To edit a Security Role:

1. Select it.
2. Edit the name or other settings.

To delete a Security Role:

3. Select the Security Role on the Objects pane.
4. Right-click and select **Delete Security Role.**
5. Click **Yes** to confirm the deletion or **No** to keep the Security Role.

If you delete a Security Role that has users assigned to it, the users retain the access rights they currently have. They now appear under <none> in the Security Roles/Users tree on the Objects pane.

Organization

Organization Overview

The figure below shows the Modules pane with Organization selected.

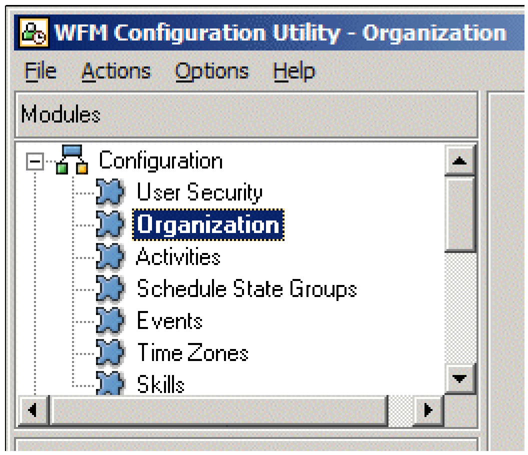


Figure 21: Configuration > Organization selected

When Organization is selected, you can configure these objects:

```
Business Units
  Sites
     Agents
        Teams
```

Sites

Sites Overview

Sites can be equivalent to switches, which are defined in Configuration Manager and imported into WFM.

You can also create sites in WFM that are unrelated to a switch. This is appropriate when switches do not correlate with your company's organization. Example: A single location could be divided into multiple entities to reflect divisions along business unit lines.

The Objects pane below shows example sites, as well as example business units.

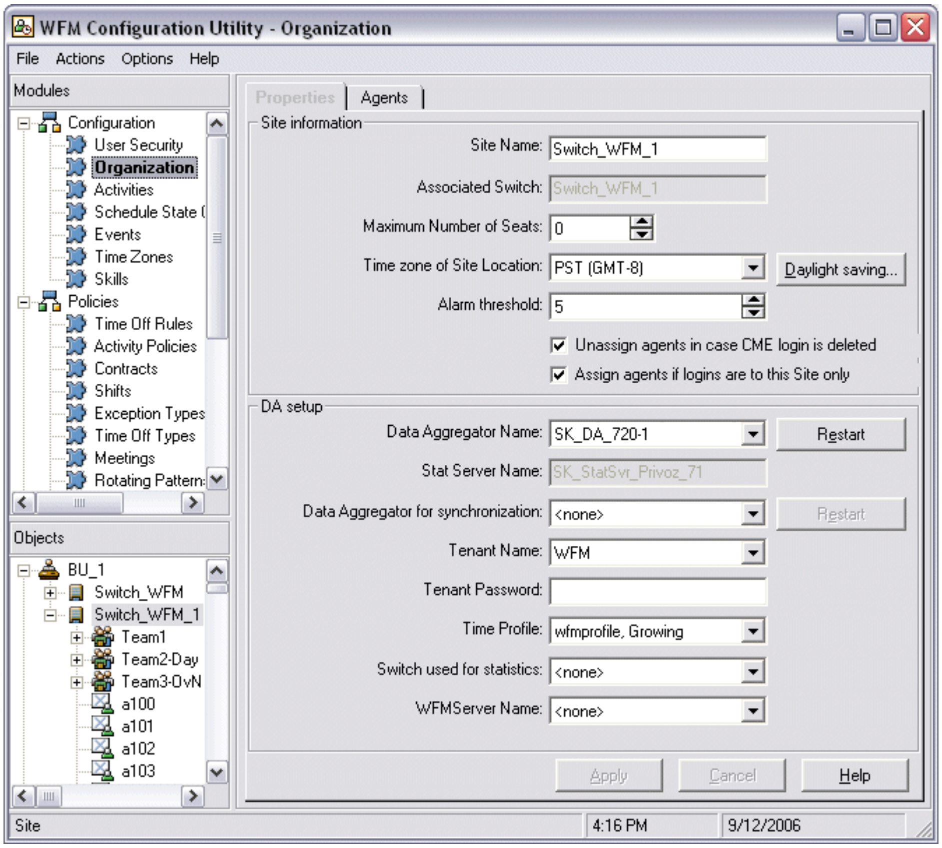


Figure 22: Objects pane showing example sites and business units

You can: create a new site, edit a site, associate agents with a site, or restart the Data Aggregator selected for a site.

Deleting a Site

To delete a site:

1. Right-click it on the Objects pane.
2. Then either:
   - Select **Delete Independent Site** (if the selected site is not under any business unit)
   - Select **Delete Site** (if the selected site is assigned to a business unit)

   from the shortcut menu that appears.

Creating Sites

To create a new site:

1. Select **Organization** on the Modules pane.

2. Right-click either an empty area of the Objects pane or an existing business unit and then use one of the following methods:

3. Select **New Site** or **New Independent Site** from the shortcut menu.

4. Right-click an existing site and select **New** from the shortcut menu.

5. Click the Actions menu and select **New Independent Site**.

The New Site Attributes dialog box opens.

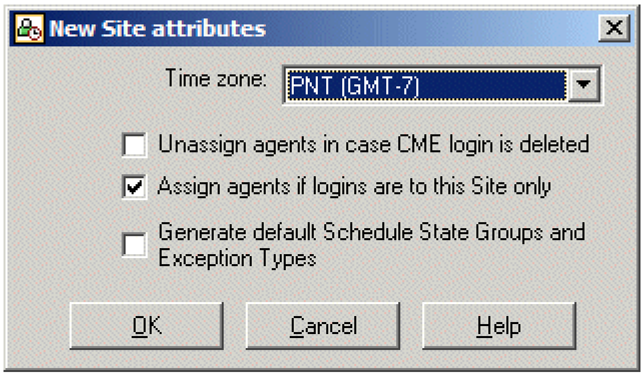


Figure 23: New Site Attributes dialog box

6. Select a time zone for the new site.

7. If you want agents to automatically appear in the Unassigned Agents list on the Objects pane tree view after they are deleted from Configuration Manager, select **Unassign Agents in Case CME Login Is Deleted.** If this option is cleared, the agents are still assigned to the site within the Configuration Utility.

8. If you want agents to be automatically assigned to this site if they have logins to this site only configured in Configuration Manager, select **Assign Agents if Logins Are to This Site Only.** If this option is cleared, no agents are automatically assigned to this site.

9. If you want Workforce Management to create default schedule state groups and exception types, select the Generate Default Schedule State Groups and Exception Types check box.

10. Click **OK.** A new site appears with the default name *New Site*.

For help with configuration of your new site, see “Site Properties” on page 56.

When you import a site using manual synchronization, you can configure it using the options in steps 3–6, above.

Creating a Site Using Copy and Paste

To create a new site by copying and pasting an existing one:

1. Right-click a site.

2. Select **Copy Independent Site** (if the selected site is not under any business unit) or **Copy Site** (if the selected site is assigned to a business unit).
3. On the Objects pane, right-click any existing independent site (if original site is independent) or site under the business unit to which the original site belongs (if original site is under a business unit) and then select **Paste <*site_name*> Copy.**

The new site appears at the end of the objects list.

Although some of the configuration settings transfer from the original to the copy, you must do the rest of the configuration as described in Site Properties and Associating Agents with a Site.

Site Properties

When you select a site on the Objects pane, the Data pane shows two tabs that contain the configuration settings for that site.

To configure a site or edit its configuration:

1. Select it.
2. Enter the appropriate settings. Each setting on the Properties tab is explained below. Settings on the Agents tab are described in Associating Agents with a Site.

Site Properties

Site Name—Enter a name for a new site or edit the existing one. The name must be unique in the WFM environment.

Associated Switch—A read-only field that shows the switch associated with the site as configured in Configuration Manager.

Maximum Number of Seats—Enter the maximum number of seats in the center. This places a limit on the number of agents that Workforce Manager can schedule at any given time.

Note: Some combinations of activity sets and task sequences may conflict with this constraint. In cases of conflict, Scheduler gives priority to the activity set.

Time Zone of Site Location—The default time zone. To change it, select the desired time zone from the drop-down list.

Daylight Saving Information—Click the Daylight saving button next to the Time Zone text box to open the Daylight Saving Time Information window. For more information on this window, see Configuring Time Zones.

Note: If you do not have security permissions for this function, the Daylight saving button is disabled.

Alarm Threshold—The number of minutes before or after a Schedule State Group is scheduled to occur before an agent is considered severely non-adherent. Can be set to any integer between 0-1440 (24 hours). The default value is 5 minutes.

Unassign Agents If Configuration Manager Login is Deleted—Controls whether WFM should automatically remove agents from the site when their logins to the site have been deleted from the Configuration Database. Be certain that you want to change this value! When you select this check box, an agent is automatically unassigned from the site if:

- An Agent's login ID to this site has been removed.
- This is an independent site and Agents do not have a login ID to this site.

Assign Agents if Logins Are to this Site Only—Controls whether WFM should automatically add agents to the site who are configured in Configuration Manager with logins for this site only. If you clear this checkbox, new agents are added to the Unassigned Agents list, and you must manually add them to the site.

Data Aggregator Name—Select the name of the Data Aggregator server to use for statistics tracking from the drop-down list. You cannot specify a Data Aggregator that is not in the list.

Stat Server Name—Verify that the correct Stat Server name appears. It will appear when you supply a DA Server name. To change the Stat Server, select a different Stat Server in the Data Aggregator application Connections tab in Configuration Manager or choose a different Data Aggregator from the Data Aggregator Name drop-down list.

Data Aggregator for Synchronization—Enter the name of the Data Aggregator that should automatically update information that is changed in the Configuration Database. This can be the same Data Aggregator that you selected for statistics tracking. You cannot specify a Data Aggregator that is not in the list.

Restart—Restarts the Data Aggregator selected in the text box next to the Restart button. The Restart enables Data Aggregator to update settings that were changed in Workforce Manager, such as *teams* or *statistics*.

Tenant Name—Select a tenant name from the drop-down list.

Note: If the Data Aggregator Name is the same for more than one contact center, the Tenant Name must also be the same for each of the corresponding contact centers.

Tenant Password—If an optional tenant password was created, enter it here. This field is editable.

Time Profile—Select the correct time profile from the drop-down list. The list includes all time profiles that were configured for the selected Stat Server. Time profiles are created in Stat Server and are required for Workforce Management. For information on setting up time profiles, see the *Workforce Management 7.6 Administrator's Guide*.

Switch Used for Statistics—If a different site is used for gathering historical data for a highlighted site, select the switch you want from this drop-down list.

WFM Server Name—Select the WFM Server application you want from the drop-down list. The WFM Server is used for forecasting, scheduling, trading, performance and adherence measurements, and so on.

Allow auto-approval of schedule trades—Select this check box to enable auto-approval of this trade type. Clear it to require manual approval of all agent schedule trades.

Associating Agents with a Site

Click a site's Agents tab to select the agents you want to associate with that site. This window has two lists, Selected Agents and Available Agents.

Agents of the following types appear in the Available Agents list:

- Assigned to another site within the same business unit (if applicable)
- Assigned to sites that are not under any business unit

Not yet assigned to any site

To sort agents in either list:

1. Click the header of the column by which you want to sort the agents.
2. To add or remove agents from a site:
3. Select an agent.
4. Click the arrow button that points toward the pane in which you want the agent to appear.
5. Click **Apply** to save your changes or **Cancel** to discard them.

Warning! When you move an agent from one site to another site, the agent's historical schedules are still available to be viewed and reported. However, any Calendar items related to that agent will *not* be available when building future schedules for the new site. This is because items such as Time Off Types, Exception Types, Contracts, and Shifts, are all configured separately for each site.

Import Agents

To import all skills, agents, and agent skills that have been configured in Configuration Manager:

- Click **Import.**

The newly-imported agents appear either in the Unassigned Agents list or under their corresponding sites on the Objects pane.

`Note:` If at least two switches are imported from Configuration Layer into WFM as sites, agents who have logins to multiple switches appear in the Unassigned Agents list after they are imported. Agents are automatically assigned to a site only if, of multiple Switches, just one is imported into WFM and you have selected the option, `Assign Agents if logins are to this Site only` in Site Properties. No agent can be assigned to more than one site at a time.

Business Units

Overview

A *business unit* consists of a set of sites that may be grouped together because the agents at the sites perform the same activity, or for ease of management. The Objects pane below shows an example business unit comprised of two sites.

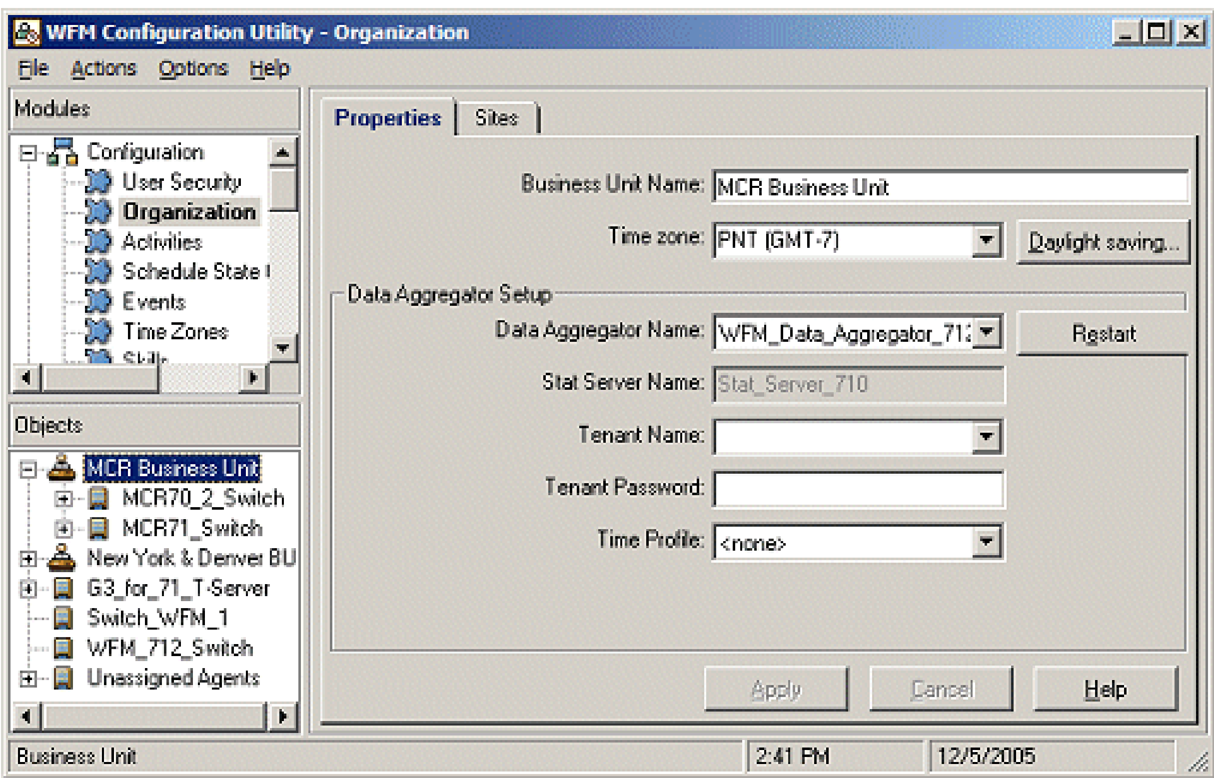


Figure 24: Objects pane shows a business unit containing two sites

For monitoring purposes, you can group activity results from the various locations as a single business unit, allowing contact center managers to evaluate activity performance across locations.

For display and staffing purposes, Workforce Manager splits the activity load among the sites that compose the business unit.

You can:

- Add a new business unit or edit an existing one.
- Delete a business unit by right-clicking it on the Objects pane and then selecting **Delete BU** from the shortcut menu that appears.
- Use the Sites tab to link sites to a business unit.

Creating Business Units

To create a new business unit:

1. Select **Organization** on the Modules pane.
2. Right-click either an empty area on the Objects pane, an existing business unit, or a site that does not belong to any business unit.
3. Select **New BU** from the shortcut menu or from the Actions menu.

   The New BU Attributes window opens.

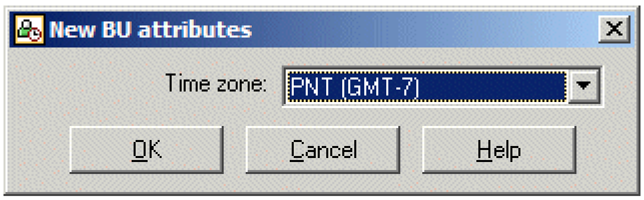


Figure 25: New BU Attributes window

4. Select a time zone for the new business unit.
5. Click **OK.**

A new business unit appears with the default name *New BU*. For help with configuration of your new business unit, see Business Unit Properties.

Creating New Business Units Using Copy and Paste

To create a new business unit by copying and pasting an existing one:

1. Select a business unit.
2. Right-click it and then select **Copy BU.**
3. Right-click an existing business unit or a site that does not belong to any business unit and then select **Paste <*business_unit_name*> Copy.**

The new business unit appears at the end of the objects list. It has the same time zone as the business unit you copied. You must do the rest of the configuration as described in Business Unit Properties and Business Unit Sites.

Business Unit Properties

When you click an existing Business Unit name in the Objects pane, the Business Unit Properties tab opens. The figure below shows an example.

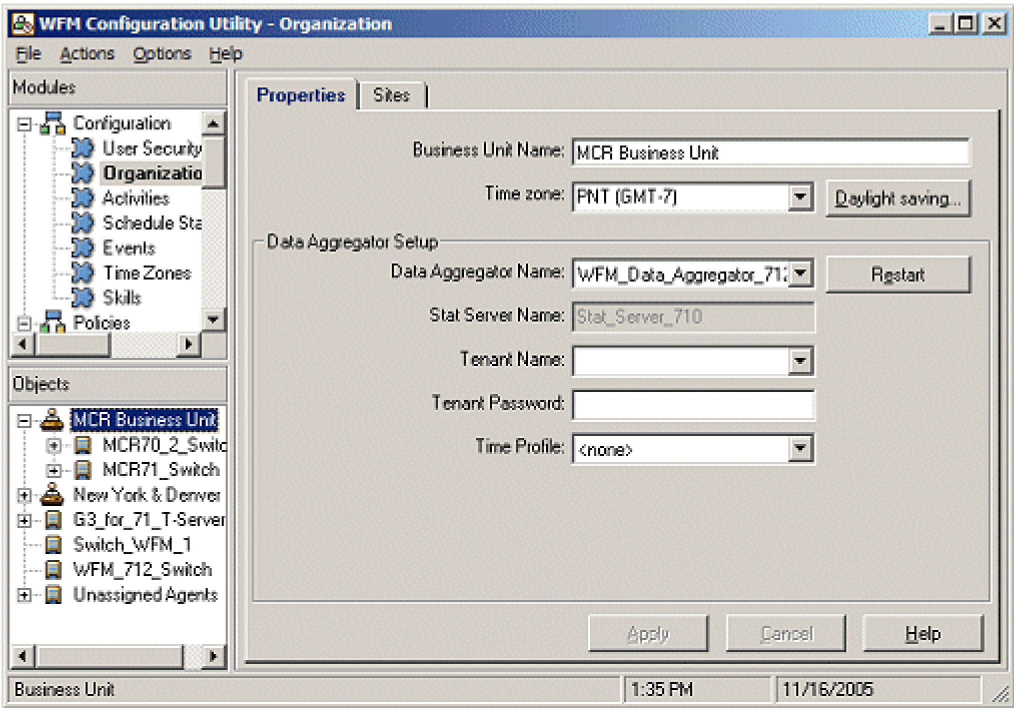


Figure 26: Business Unit Properties tab

Use this tab to edit the business unit:

- **Business Unit Name**—Enter a name. This name must be unique in the WFM environment.
- **Time zone**—This shows the default time zone. To change it, select a different time zone from the drop-down box.
- **Daylight Saving Information**—Click **Daylight saving** to open the Daylight Saving Time Information window. For more information on this window, see Configuring Time Zones.

> Note: If you do not have security permissions for this function, the Daylight saving button is disabled.

Data Aggregator Setup

Data Aggregator Name—Select the name of the Data Aggregator server you want to use for statistics tracking from the drop-down list. You cannot specify a Data Aggregator that is not in the list.

Stat Server Name—Verify that the correct Stat Server name appears. It will appear when you supply a DA Server name. To change the Stat Server, select a different Stat Server in the Data Aggregator application Connections tab in Configuration Manager or choose a different Data Aggregator from the Data Aggregator Name drop-down list.

Tenant Name—Select a tenant name from the drop-down list.

Note: If the Data Aggregator Name is the same for more than one contact center, the Tenant Name must also be the same for each.

Tenant Password—If an optional tenant password was created, enter it here. This field is editable.

Time Profile—Select the correct time profile from the drop-down list. The list includes all time profiles configured for the selected Stat Server. Time profiles are created in Stat Server and are required for Workforce Management. For information on setting up time profiles, see the current *Framework Stat Server User's Guide*.

Additional Options

- Click the Business Unit Sites tab for additional business unit configuration options.

Business Unit Sites

This tab enables you to select the sites you want to be included in the business unit.

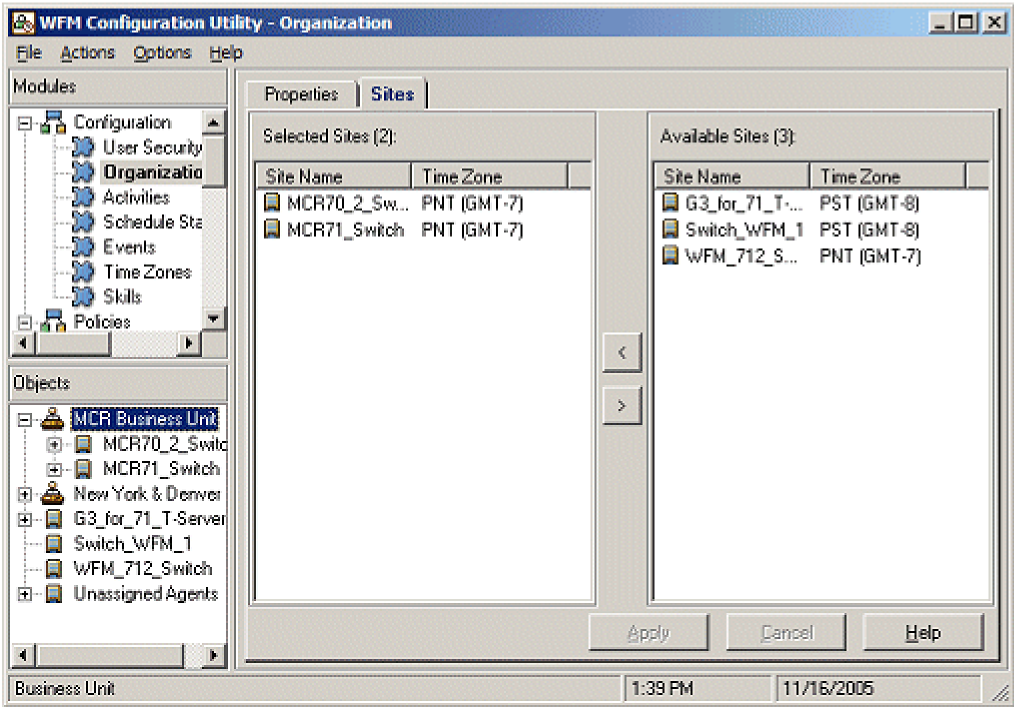


Figure 27: Business Unit Sites Tab

The sites you include appear in the Selected Sites list. The Available Sites list shows all available independent sites.

To include or remove a site from your business unit:

1. Select the site.
2. Click the button pointing toward the pane where you want the site to appear.
3. When you are finished selecting sites for the business unit, click **Apply** to save the changes or **Cancel** to discard them and return to the existing configuration.

To sort the sites in either list:

- Click the header of the column by which you want to sort the sites.

Teams

Overview

Teams are defined as a group of agents (unrelated to Agent Groups in Configuration Manager). WFM supports security permissions at the team level so that teams may be a set of agents with the same supervisor or manager. Each site configures its own teams.

To see teams that have been configured for a site:

Expand a site node on the Objects pane.

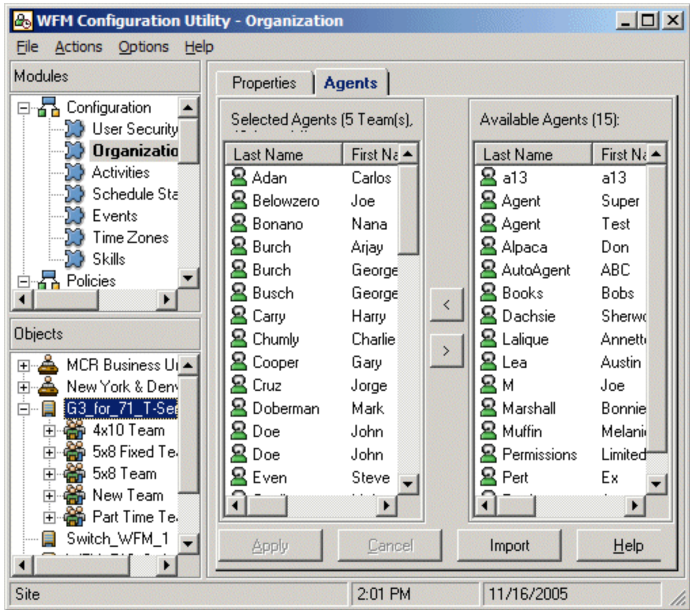


Figure 28: Objects Pane, Site Node, Agents Tab

You can:

- Configure teams (create, edit, and delete them).
- Assign rotating patterns to teams.

Team Configuration

You can create, edit, and delete teams. You can copy and paste an existing team to create a new one. or you can make rotating pattern assignments for teams and team members.

Creating Teams

To create a team:

1. On the Objects pane, right-click the site.
2. Select **New Team** from the shortcut menu. The team appears in the tree view with the default name *New Team*.

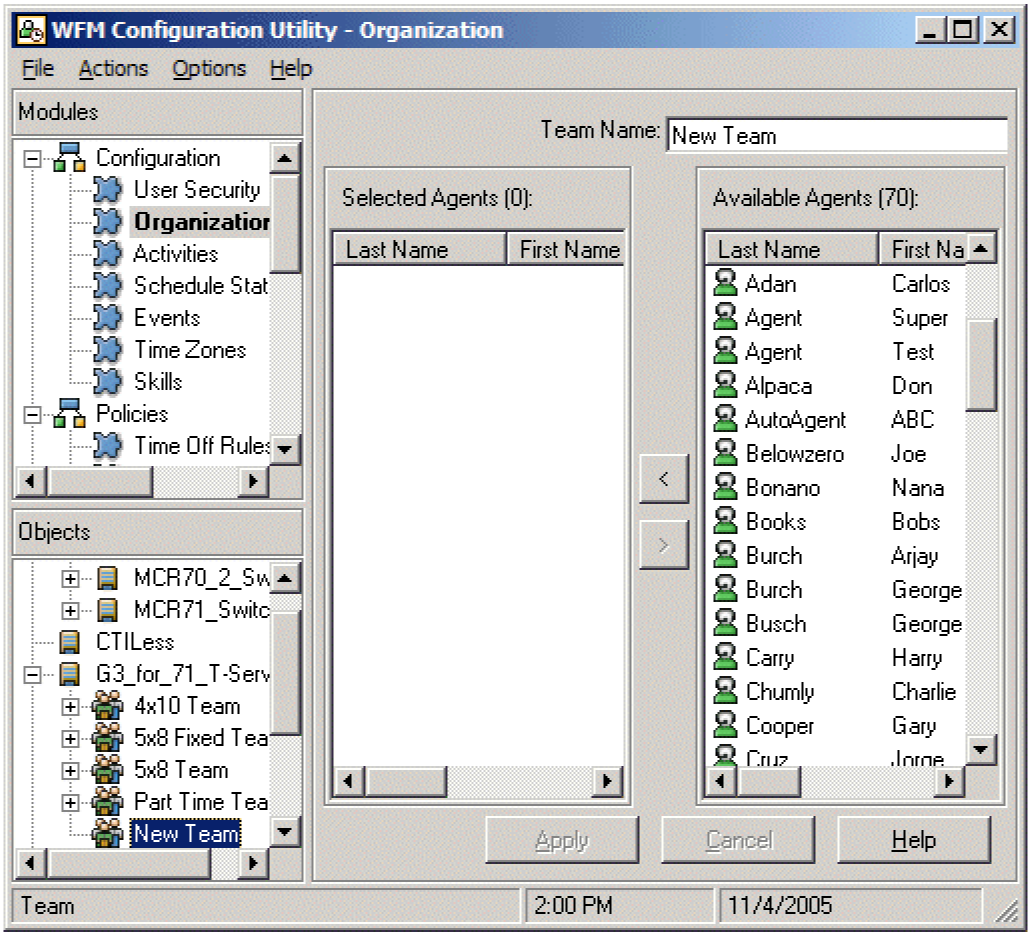


Figure 29: New Team

3. Enter a name for the team. The team name must be unique within the site.
4. Select the agents you want to include in the team.

   To select multiple agents, hold down [Ctrl] to highlight one agent at a time; or select an agent, hold down [Shift] and select another agent to highlight the two agents and all others listed between them.

   Note: An agent can belong only to one team.

5. To move an agent from the Available Agents list to the team, select the agent(s) to put on the team and click **<.**
6. Remove an agent or agents from the team by selecting them and then clicking > to return them to the Available Agents list.
7. Click **Apply** to save your changes or **Cancel** to discard them.

Team Properties

Team Name—The name for the team. Use names, such as *Top Sales*, *Latin America*, or *Trainees*, that identify the team type.

Rotating Pattern—You can assign some or all members of a team to a rotating pattern and can remove members from a rotating pattern. (Rotating patterns are defined in the Rotating Patterns window.)

Selected Agents—All agents currently assigned to this team. The agent lists show the first name, last name, team name, and contract for each agent.

Available Agents—All agents with no team from the current site and the business unit to which the site belongs (if applicable). Agent lists show the first name, last name, team name, and contract for each available agent.

Creating Teams Using Copy and Paste

To create a new team by copying and pasting an existing one:

1. Select a team.
2. Right-click it and then select **Copy Team.**
3. Right-click a site and then select **Paste <*team_name*> Copy.**

The new team appears at the end of the objects list for the selected site.

Deleting Teams

To delete a team:

1. On the Objects pane, right-click the team you want to delete.
2. Select **Delete** from the shortcut menu.
3. Click **Yes** when prompted for confirmation.

Note: When you delete a team from a site, all the members of the team become *agents* who are listed under the site but not under a specific team. You can then assign them to a different team.

Editing Teams

To add to or remove agents from a team:

1. On the Objects pane, select the team in the tree view.
2. In the Selected Agents or Available Agents pane, select the agents you want to move.
3. Click > to remove one or more selected agents from the team.
4. Click < to add one or more selected agents to the team from the Available Agents pane.

5. Click **Apply** to save your changes or **Cancel** to discard them.

Making Rotating Pattern Assignments

To change Rotating Pattern assignments:

1. Select the team.
2. Click **Rotating Pattern.**

   The Team's Rotating Pattern window appears.
3. Make your changes. For an explanation of the Team's Rotating Pattern window, see Team Rotating Pattern Window.
4. Click **OK.**

The Team Rotating Pattern window closes.

Team Rotating Pattern Window

Use this window to make and to modify team rotating pattern assignments.

To use the Team Rotating Pattern window:

1. Select a team.
2. Click **Rotating Pattern.**

   The Team's Rotating Pattern dialog box opens.

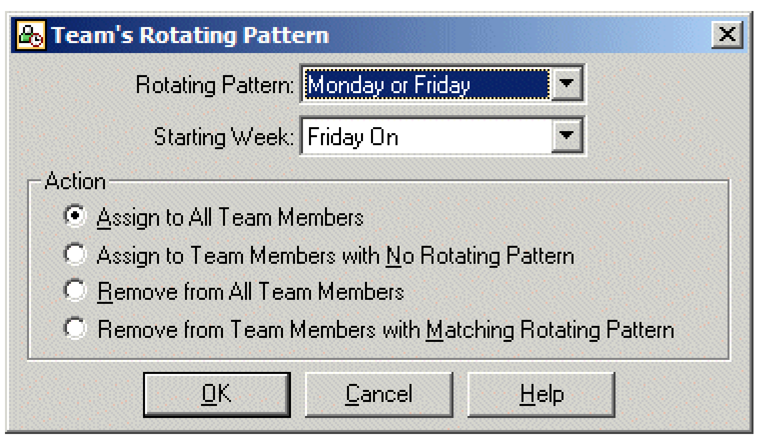


Figure 30: Team's Rotating Pattern dialog box

3. Select a rotating pattern.
4. Select the starting pattern.
5. Select an action.
6. Click **OK.**

A progress bar appears. If you are assigning a rotating pattern to a large number of agents, this process may take several minutes. After the assignment is complete, a message box indicates how many agents received the rotating pattern.

Team Rotating Pattern Properties

Rotating Pattern—The name of the rotating pattern you want to apply.

Note: You must configure a Rotating Pattern before you can select it here.

Starting Week—Rotating Patterns consist of a sequence of weekly patterns. You can start the rotating pattern assignment with any weekly pattern in the rotating pattern sequence.

See Rotating Pattern for the weekly patterns that are included in each rotating pattern.

Assign to All Team Members—The selected rotating pattern is assigned to all members of the selected team. When Scheduler creates the schedule, it is bound by the rules of this rotating pattern.

Assign to Team Members with No Rotating Pattern—The selected rotating pattern is assigned to all members of the selected team who are currently not assigned to any rotating pattern. This property is useful when some members of the team already have rotating patterns assigned to them. When Scheduler creates the schedule, it is bound by the rules of this rotating pattern.

Remove from All Team Members—All rotating pattern assignments are removed from team members. This property does not delete the rotating patterns themselves.

Remove from Team Members with Matching Rotating Pattern—The rotating pattern is removed from only those team members who have this specific rotating pattern defined. This property does not delete the rotating pattern itself.

Agents

Overview

An *agent* in Genesys Workforce Management is a Person object in Configuration Manager that has the Is Agent checkbox selected. Agents are imported from Configuration Manager, then assigned additional properties in the Configuration Utility.

You can:

- Configure agents.
- View the activities an agent can perform.
- Make and remove agent rotating pattern assignments.

- Make and edit comments about agents.

Configuring Agents

An agent in Genesys Workforce Management is a Person object in Configuration Manager that has the Is Agent checkbox selected. To import agents:

- Select a site and then click **Import** on the Agents tab.

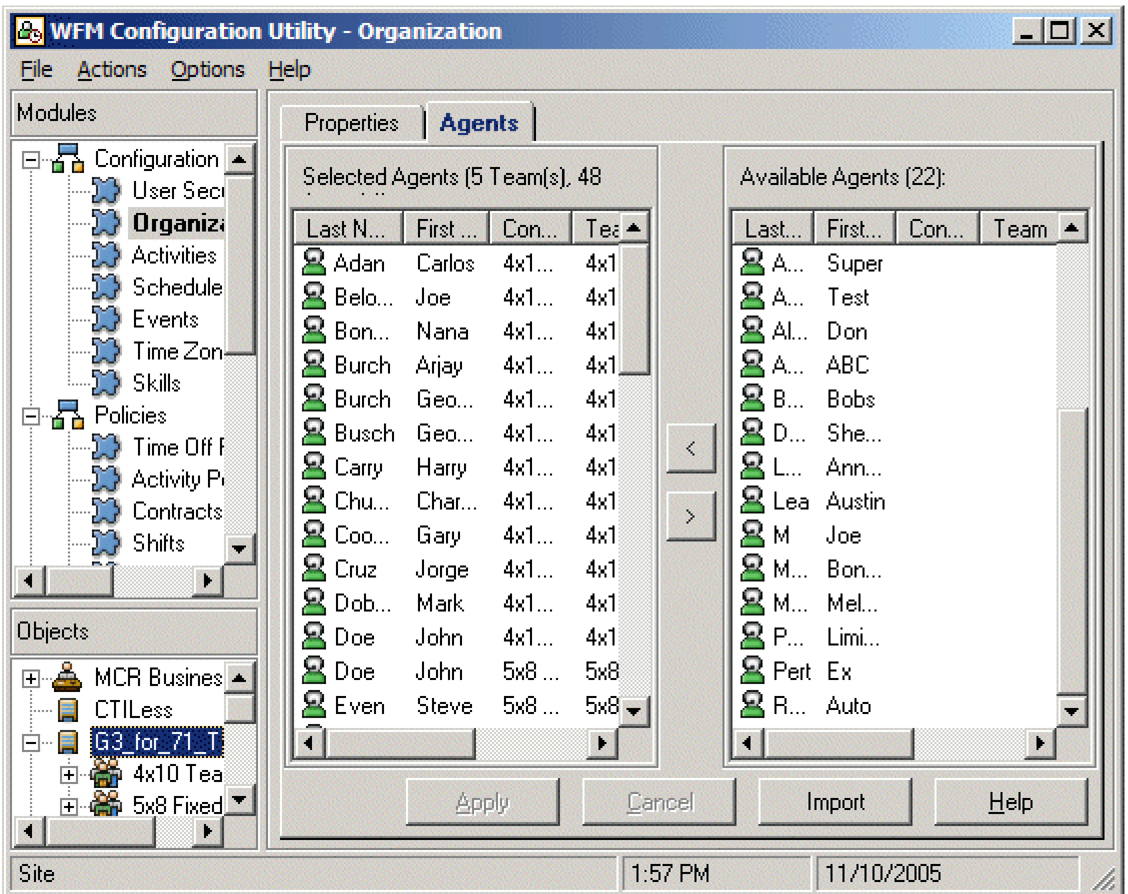


Figure 31: Agents Tab, Import Button

Notes: Agents that are deleted from Configuration Manager are retained in the WFM database because they might still appear in schedules. If an agent is deleted from Configuration Manager, then the agent appears as terminated when you next import agents from Configuration Manager. You can delete terminated agents from the WFM database using WFM Database Utility.

If you enter a termination date in the WFM Configuration Utility, this date is retained. If there is no date entered when you import agents, the import date is automatically set as the termination date but the checkbox that indicates that the agent is, in fact, terminated, is cleared. At the time the agent is actually terminated, select the checkbox and set the correct date.

Viewing Agent Properties

To see the properties for an individual agent:

- Select an agent name in the Objects pane. The Agent Information tab of the Organization window appears.

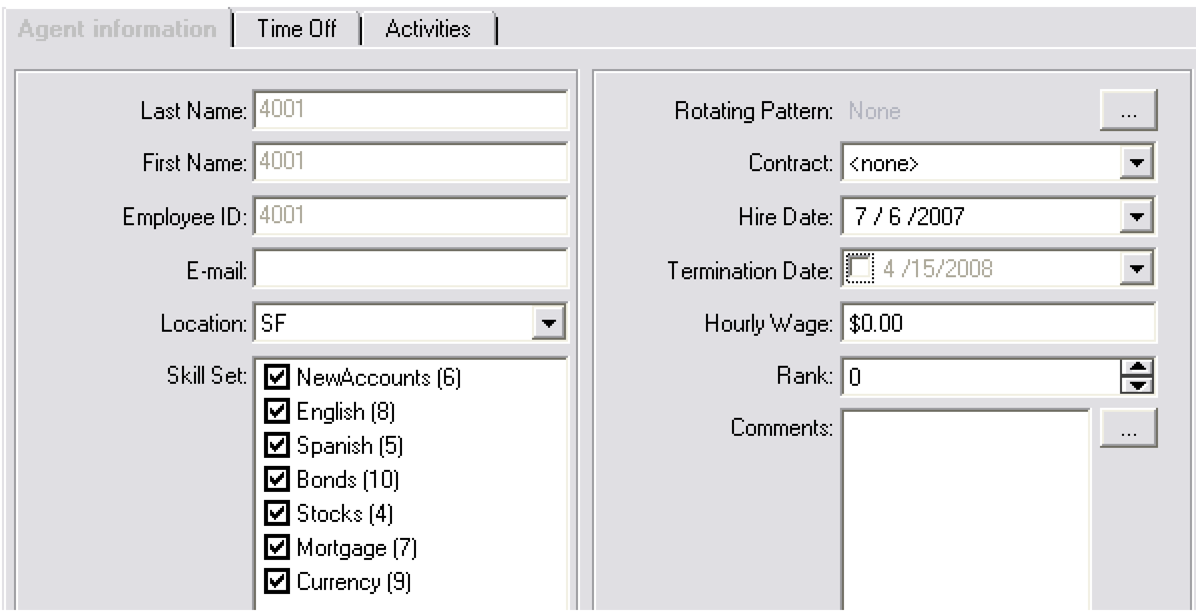


Figure 32: Organization window, Agent Information tab

To sort the agent list by Last Name, First Name, Contract, or Employee ID:

1. Right-click a site or team in the Objects pane.
2. Select the sort type from the shortcut menu.

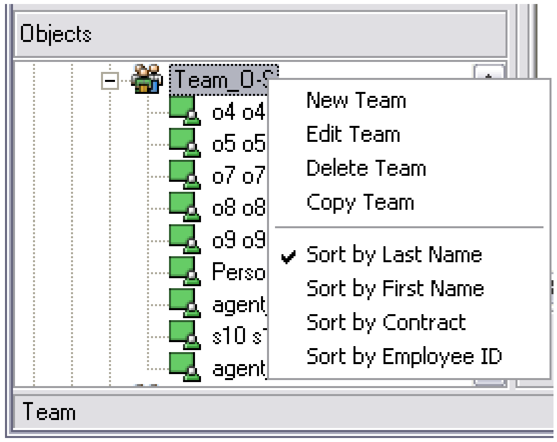


Figure 33: Shortcut Menu

By default, agent names are displayed in the format *FirstName LastName*. You can change this to *LastName FirstName* or *LastName*, *FirstName* by configuring the optional NameOrder option in the WFM Client Application object. See the description of this option in the current *Workforce Management Administrator's Guide* for details.

To define an agent's properties:

1. Select the agent name in tree view.
2. Select, or clear, properties on the Agent Information and Time Off tabs.

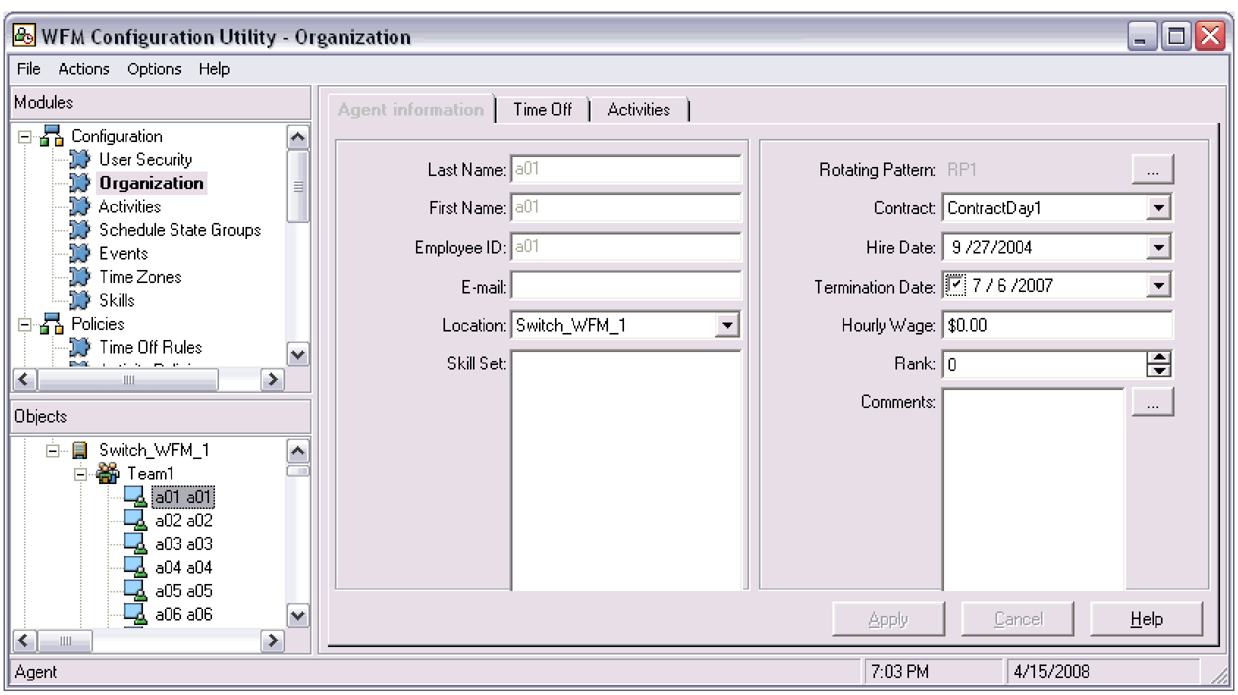


Figure 34: Agent Information and Time Off tabs

3. Click **Apply.**

Note: You cannot delete agents in WFM Configuration Utility. You can only delete agents using the WFM Database Utility.

Editing Agent Information

The agent's name, Employee ID, and e-mail are not editable fields. To edit them, reconfigure these properties in Configuration Manager and then re-synchronize using one of these methods:

- Select Agents Update from the Actions menu.
- Use the Import button in the Agents tab for the Site.
- Run a full synchronization.
- Use the automatic updates supplied by Data Aggregator.
  - **E-mail—**Used for notifying of agent schedule change events, changes in the status of schedule trade requests, and changes in the status of time-off requests.
  - **Location—**The name of the site, if any, that the agent is associated with. To associate the agent with a site, click the drop-down arrow and choose a site from the list.
  - **Skill–Set—**The skill set includes all the skills configured for the agent in Configuration Manager. By default all skills are selected, but you can disable skills in the WFM Configuration Utility by clearing the check box next to the skill. This feature enables you to have the scheduling engine disregard low-priority skills.

Note: Disabling skills in the Workforce Manager Configuration Utility does not affect skill configuration in other Genesys products. To delete or add a skill, you must make the change in Configuration Manager and then synchronize the Workforce Management skills with those in the Configuration Database.

  - **Rotating Pattern—**You can assign or remove a rotating pattern for each agent. To reach the Agent's Rotating Pattern dialog box, click the **...** button next to the Rotating Pattern text box. See Agent Rotating Patterns for details.
  - **Contract—**You must assign a contract to each agent. Select the correct contract from the drop-down menu.
  - **Hire Date—**When new agents are imported from Configuration Manager, the hire date is set as the date of import. Change the date to indicate the agent's actual date of hire. The scheduling engine does not include agents whose date of hire lies in the future.

- **Termination Date—**To set a termination date for an agent, select the check box and enter the termination date.

Note: After an agent is deleted in Configuration Manager, the agent properties are maintained in the Workforce Management database. However, you can choose to have deleted agents hidden from view in Workforce Manager by enabling the following option in Configuration Manager: WFM Client Application object > Options tab > Options section > HideTerminatedAgents option. For details, see "Configuring Application Object Settings," in the current *Workforce Management Administrator's Guide*.

- **Hourly Wage—**An optional parameter that specifies the agent's hourly wage, to be used in budgeting. You can configure this so it appears only to users with appropriate security rights in the User Security Modules tab.
- **Rank—**An optional setting, which may be used as the criterion for allocating agent preferences during scheduling. The value for rank can be up to 5 digits. If you do not use ranking, leave this parameter set to **0(which is the lowest rank value)**. This rank setting affects Workforce Management only; it is not related to the agent rank configured in Configuration Manager.
- **Comments—**An optional comment relating to the agent. You can add, delete, and edit comments directly in the Comments text box or click the **...** button to open the Edit Comments window.

To add or edit a comment in the Comments text box:

1. Click inside the Comments text box to insert the cursor.
2. Type a comment into the text box or edit the existing comment.
3. Click **Apply.**

Agent Time Off

After you configure time-off types and time-off rules, you can use the Agent Time Off tab to assign them to agents. The figure below shows an example Time Off tab.

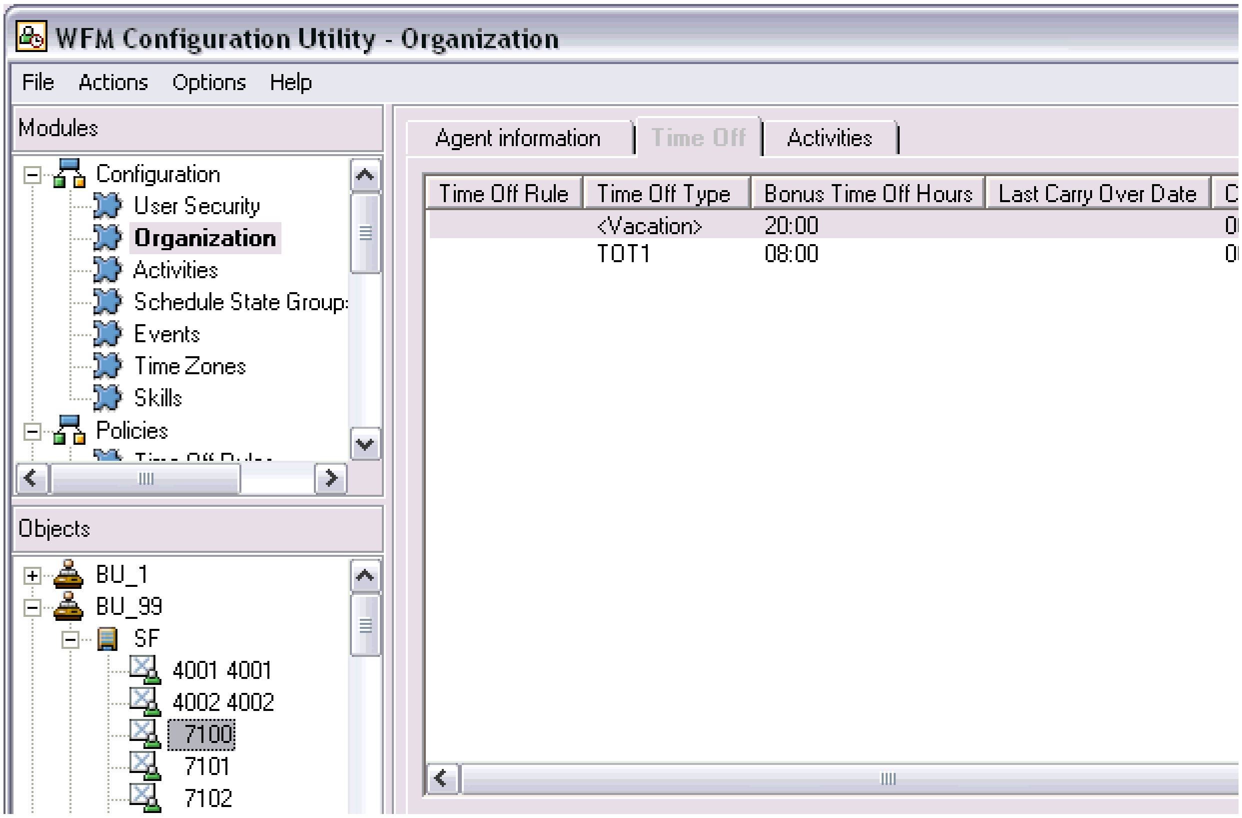


Figure 35: Agent Time Off tab

Add button—Use to assign a time-off item (that is, a time-off type and one of its associated rules) to an agent.

Edit button—Use to edit which time-off items are assigned to the agent.

Delete button—Use to remove a time-off item from the agent.

Warning! If you delete a selected Time Off Type, the Bonus Time Off and/or Carried Hours shown in the Time Off tab for the agent are lost. Before deleting, make a note of the current Bonus Time Off hours. If you substitute a new Time Off Type for the deleted Time Off Type, you may want to re-enter the hours.

- **Carry-Over** button—If the current date is more than a year after the last carry-over date for a time-off type, click this button to calculate time off hours carried over into the current year. If less than a year has passed since the previous carry-over date, clicking this button has no effect.
- **Apply** button—Saves your changes.
- **Cancel** button—Restores the settings to those existing when you last saved.

Time-Off List

For each time-off item, the Time Off tab lists the following information:

- **Time-Off Rule—**The name of the time-off rule. Time-off rules indicate how much time off of the associated time-off type is awarded or accrues per period. Use different time-off rules to have time off accumulate at different rates for different categories of agents. See Time-Off Rules Overview for more information.
- **Time Off Type—**The time-off type. Examples of possible time-off types include vacation, sick leave, holiday, jury duty, maternity leave, and so on. A time-off type can appear only once for each agent. See Time Off Types Overview for more details.
- **Bonus Time Off Hours—**An optional parameter indicating the number of time-off hours of this type given to an agent that are not accumulated based on the time-off rule. Use this setting to adjust the time-off balance. You can enter either positive or negative numbers to add or subtract from the agent's time-off balance.
- **Last Carry-Over Date—**The date at which one time-off accrual period ends and the next begins. You configure this setting during time-off rule configuration.
- **Carried Hours—**For each time-off item, the number of time-off hours carried over at the latest carry-over date. This number is calculated based on information in the Time Off Rules module.
- **Stop Date—**If the agent is removed from the site or the time-off rule is removed from the agent, the date this occurred is set as the *Stop Date*. When you perform a carry-over calculation, the time-off balance for the associated time-off type is calculated up to the stop date using the formerly-assigned time-off rule. Any new time-off rule assigned for that time-off type takes effect after the stop date.

Consequences of Changing a Time Off Rule

When you change a Time Off Rule, or change the assignment of a Time Off Rule to an agent, there are 3 possible results:

- The rule change is saved and your existing time off balance is recalculated.
- The rule change is saved and your existing time off balance is not recalculated.
- The rule change is abandoned; nothing at all changes.

Here is how you can reach each of these three possible results:

When you choose Save, a "Yes-No" message appears asking if you want the system to recalculate the time off balance:

```
Do you want to calculate time off balance? (Yes/No)
```

- Select **Yes** to start the existing time-off balance calculation process.
  A second question appears:
  `Time Off balances for the selected agents who have a time off rule assigned to them will be calculated using the old time off rule and the hours accrued up to <today's date> will be saved. After you change the time off rule, time off accrual will be calculated using the new rule. Do you want to proceed? (Yes/No)`
  - Select **Yes** to save the time off rule changes, AND to calculate time off by the old rule and future time off by the new rule. This result (**#1**) cannot be changed or undone.
  - Select **No** to perform no calculations, to change nothing and save nothing. (**#3**)
- Select **No** (to the previous question `Do you want to calculate time off balance?`) to *not* calculate the time-off balance.
  A second question appears:
  `The changes might affect Agent's time off balance. Are you sure you want to save the changes without calculating time-off balance? (Yes/No)`
  - Select **Yes** to save the time off rule changes and to save the time off balance with no calculations. This result (**#2**) cannot be changed or undone.
  - Select **No** to perform no calculations, to change nothing and save nothing. (**#3**)

Agent Time Off (Add or Edit)

To open the Agent Time Off (Add) dialog box, select an Organization in the Modules pane, select an agent in the Objects pane, and click the Time Off tab in the Data pane. Then, click the Add button.

- Use the Agent Time Off (Add) dialog box to assign a Time Off item to an Agent.

To open the Agent Time Off (Edit) dialog box

1. Select an Organization in the Modules pane.
2. Select an agent in the Objects pane, and click the Time Off tab in the Data pane.
3. Click the Edit button.

The corresponding Agent Time Off dialog box appears: (Add) or (Edit). Both dialog boxes contain the same fields.

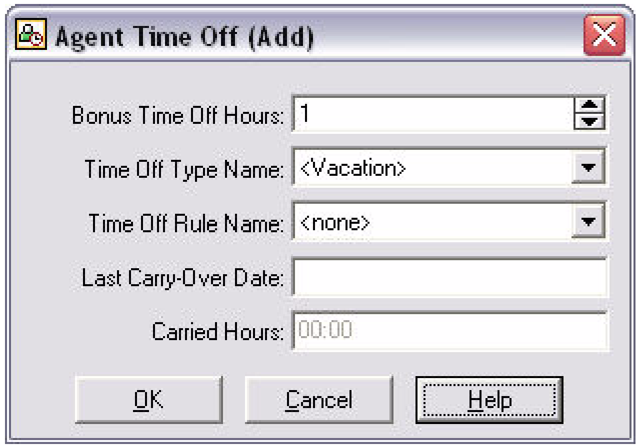


Figure 36: Agent Time Off Edit dialog box

Use the Agent Time Off (Edit) dialog box to modify a Time Off item that has already been assigned to an Agent.

Make your changes to each field, by either typing or selecting a value. For the definitions of these fields, see the Agent Time Off Tab topic.

Agent Activities

Use the Activities tab to see what activities an agent can currently work on. This tab is read-only. It reflects the agent's skills in Configuration Manager.

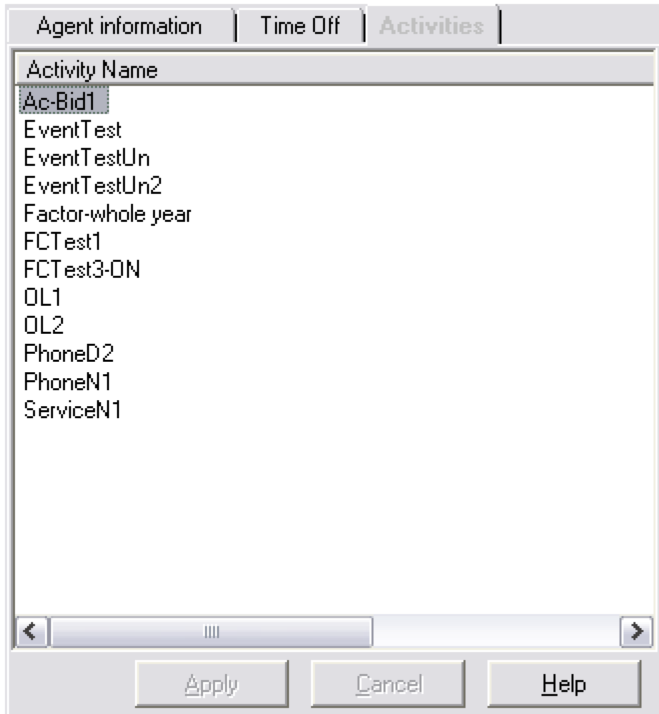


Figure 37: Agent Activities

You cannot manually assign activities directly to an agent. Activities are automatically assigned based on the skills configured for the agent. If an agent's skill set is equivalent to an activity skill set, then the agent can work on the activity.

To change activity assignments:

- Reconfigure skills for either the agent or the activity.

Agent Rotating Patterns

Open the Agent's Rotating Pattern dialog box from the Agent Information tab to make or modify the rotating pattern assignment for an agent.

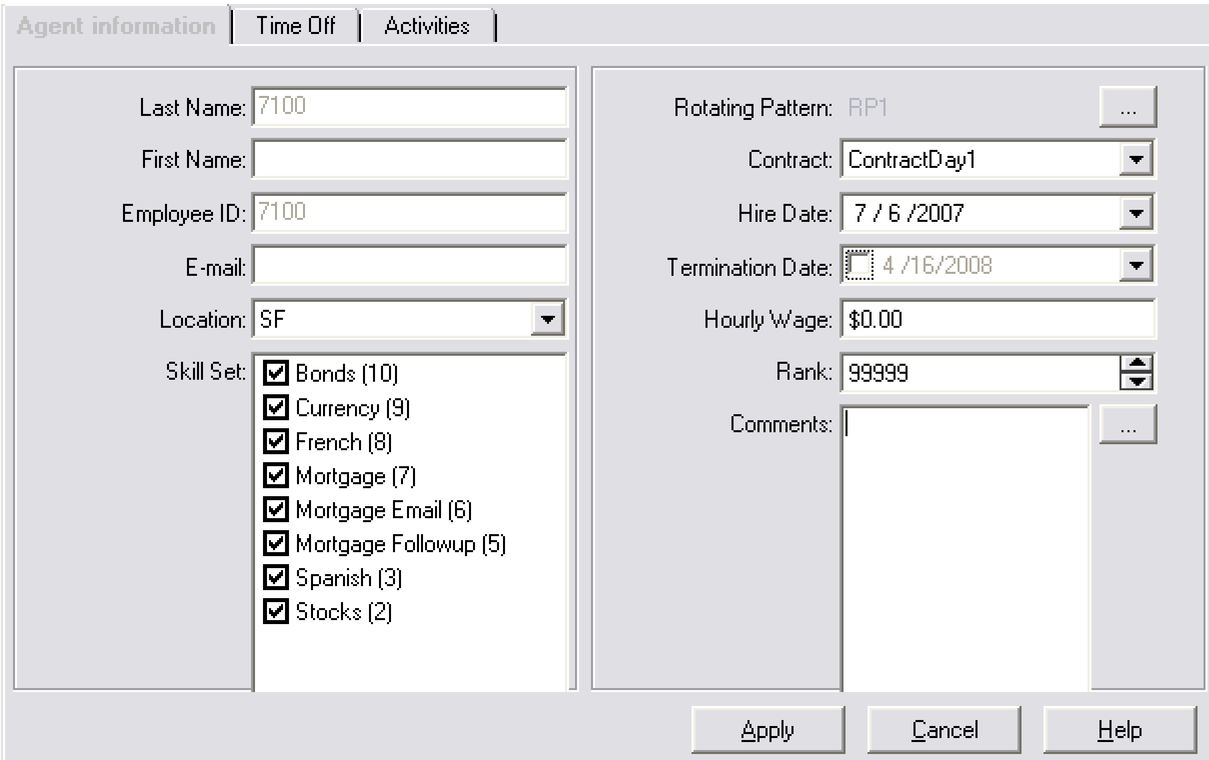


Figure 38: Agent Information dialog

After selecting the agent, click the **...** button on the Agent Information tab to open the Agent's Rotating Pattern dialog box.

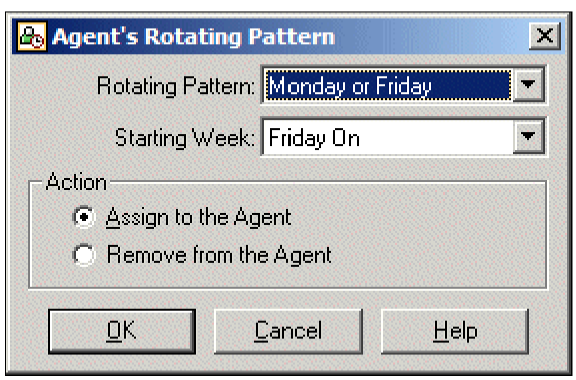


Figure 39: Agent Rotating Patterns dialog

Note: To configure Rotating Patterns, click Rotating Pattern in the Policies module and then select the site you want. You can add a new Rotating Pattern or edit an existing one. See Rotating Patterns Overview for more information. You can also assign the rotating pattern to agents from this module. See Associating Agents with a Rotating Pattern for more information.

To use the Agent's Rotating Pattern window:

1. Select a Rotating Pattern from the drop-down list.
2. Select the starting week from the drop-down list.
3. Choose to apply or to remove the rotating pattern assignment.
4. Click **OK.**

Properties of Agent Rotating Pattern

Rotating Pattern—Select a rotating schedule from the drop-down list.

Note: You must configure a Rotating Pattern before you can apply it to an agent.

Starting Week—Rotating Patterns consist of a sequence of weekly patterns. The rotating pattern assignment can start with any weekly pattern in the rotating pattern sequence. See Creating and Editing Weekly Patterns.

Assign to the Agent—The selected rotating pattern is assigned to the agent. When Scheduler creates the schedule, it is bound by the rules of this rotating pattern.

Remove from the Agent—The agent is no longer associated with the selected rotating pattern. This property does not delete the rotating pattern itself.

Editing Agent Comments

Any comments that exist for the selected agent appear in the Comments text box.

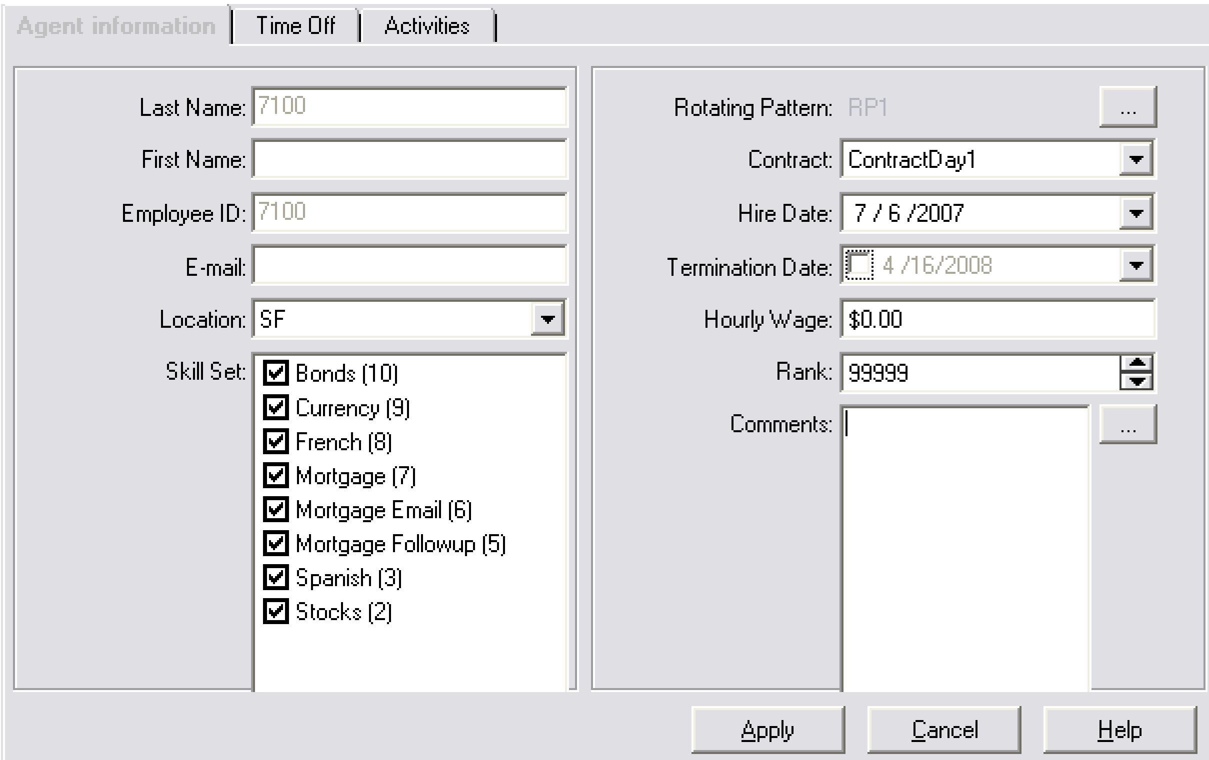


Figure 40: Editing Agent Comments

To edit the comment:

1. Click **...** to reach the Edit Comments window.
2. Change the comment.
3. Click **OK.**

Your changes appear in the Agent Information Comments text box.

Note: Press [Ctrl] + Enter in this text box to start a new paragraph.

Activities

Overview

Activities are work that is tracked and managed using Genesys Workforce Management. For example, answering inbound calls, responding to e-mail, completing after-call work, performing scheduled callbacks, and participating in chat sessions.

You must configure activities separately for each site or business unit. Business units require multi-site activities, which combine activities at some or all of the sites in a business unit and in independent sites.

When you select a site on the Object pane, the activities configured for that location appear in the Data pane.

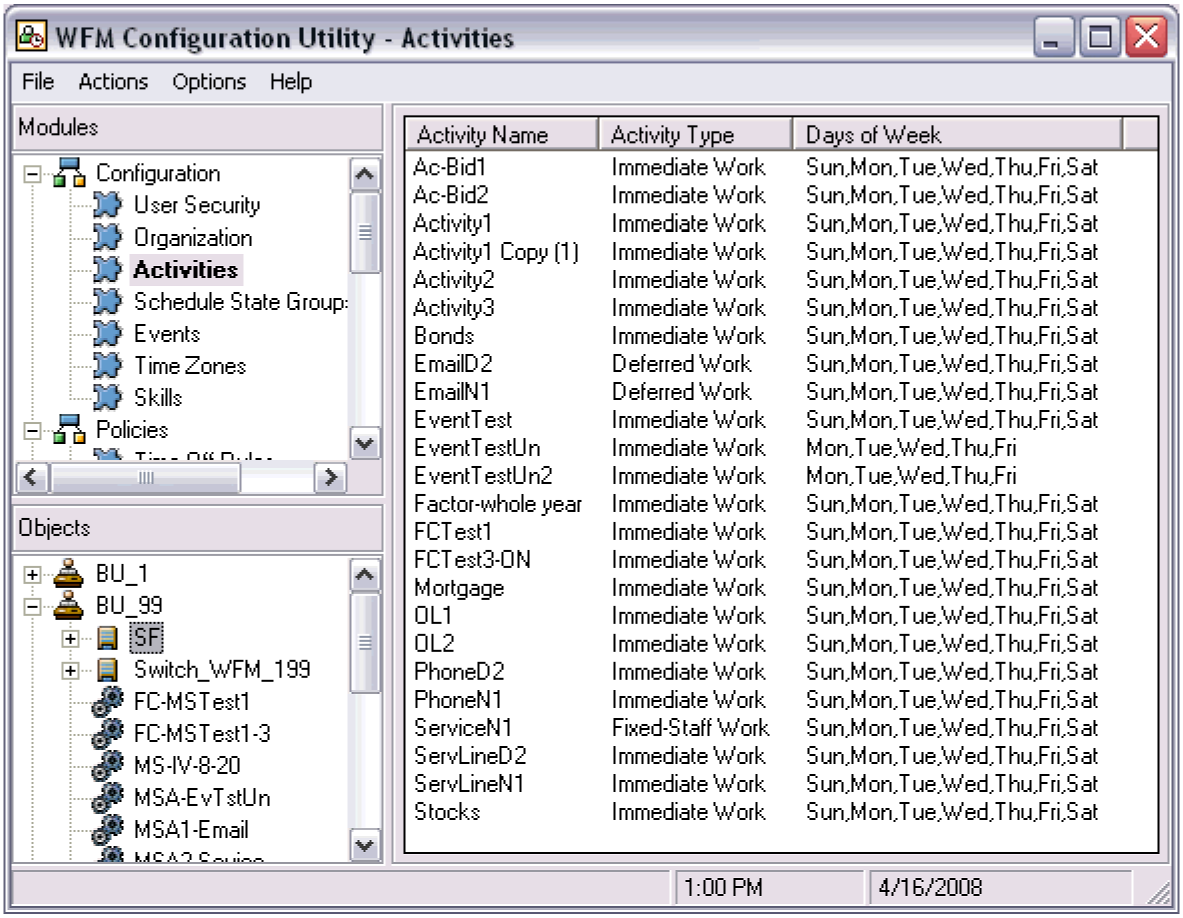


Figure 41: Site Activities listed

- Double-click an activity to edit it.
- For instructions on creating a new activity, whether regular or multi-site, see Creating Activities.
- To define regular activities, use these three tabs: Skills Configuration for Activities, Statistics Configuration for Activities, and Activities Agents.
- To configure multi-site activities, use these two tabs: Assigning Activities to a Multi-Site Activity and Configuring Statistics for a Multi-Site Activity.

- To perform additional activities configuration, including staffing properties and open hours, use the Policies > Activity Policies module: see Activity Staffing and Open Hours Rules and Multi-Site Activity Staffing and Open Hours Rules.
- To associate Stat Server statistics with activities for use in monitoring interaction and service levels, use the Statistics tab.

Creating and Deleting Activities

You can add an activity or a multi-site activity by creating an entirely new one or by copying and pasting an existing one.

To create an activity:

1. On the Objects pane, right-click the site to which you want to add the new activity or an existing activity in that site.

2. Select **New Activity** from the shortcut menu.

The Select Type of Activity dialog box opens.

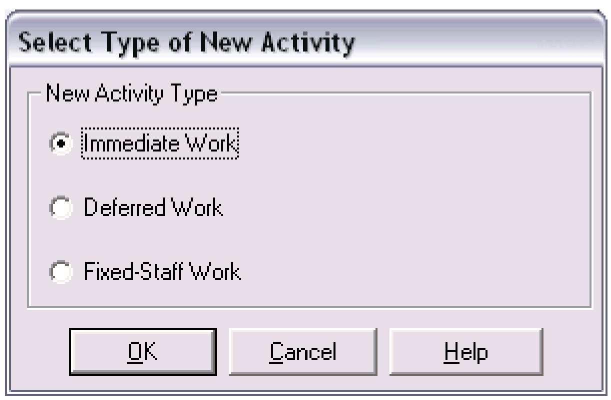


Figure 42: Select Type of Activity dialog box

3. Select the radio button next to the appropriate activity type.

- **Immediate Work—**CTI activities that use Workforce Management service objectives for Forecasting and Adherence.
- **Deferred Work—**Backlog activities, such as e-mail, that use special forecasting calculations.
- **Fixed-Staff Work—**Non-CTI activities that do not use Workforce Management service objectives.

4. Click **OK.**

A new activity appears in the tree view, with the default name *New Activity*, and the Activities configuration window opens.

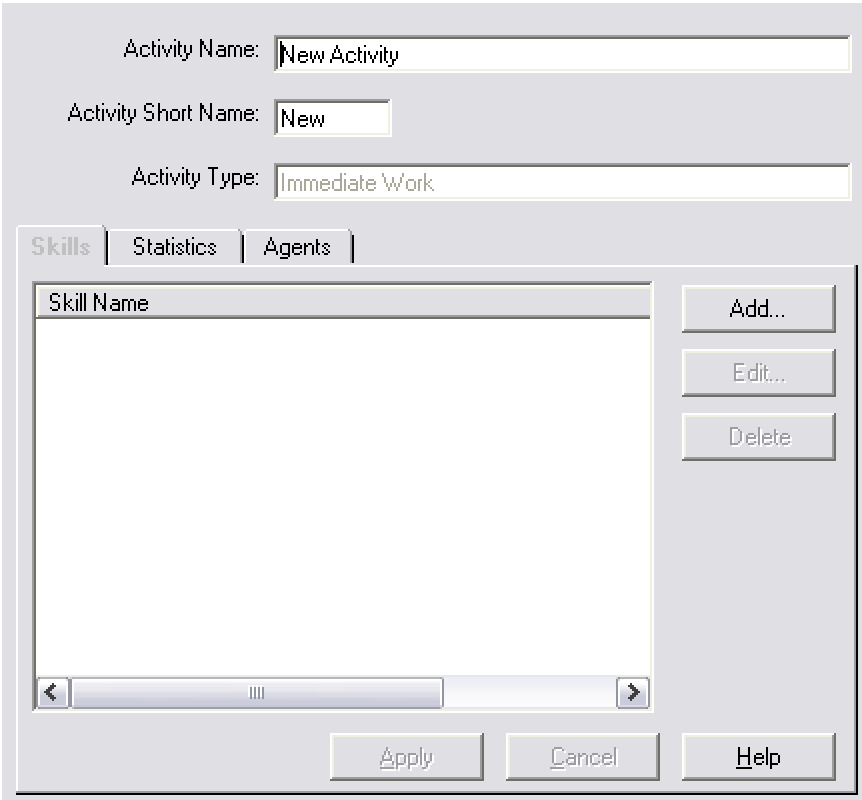


Figure 43: Activities Configuration Window

5. Enter a name and a short name for the activity. The name must be unique within the site.

   The short name can be up to three characters and identifies the activity in Schedule displays. The short name does *not* need to be unique.

6. Configure the activity as explained in Skills Configuration for Activities, Statistics Configuration for Activities, and Activities Agents Tab.

To create a multi-site activity:

1. On the Objects pane, right-click the business unit to which you want to add the new activity or an already-existing multi-site activity in that business unit.
2. Select **New Multi-Site Activity** from the shortcut menu. The Select Type of New Multi-Site Activity dialog box opens.

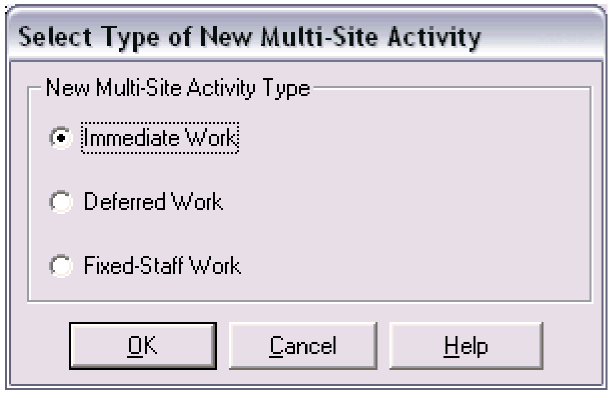


Figure 44: Select Type of New Multi-Site Activity dialog box

3. Select the radio button next to the appropriate activity type.

- **Immediate Work—**CTI activities that use Workforce Management service objectives for Forecasting and Adherence.
- **Deferred Work—**Backlog activities, such as e-mail, that use special forecasting calculations.
- **Fixed-Staff Work—**Non-CTI activities that do not use Workforce Management service objectives.

4. Click **OK.**

A new activity appears in the tree view, with the default name *New Multi-Site Activity,* and the Activities configuration window opens.

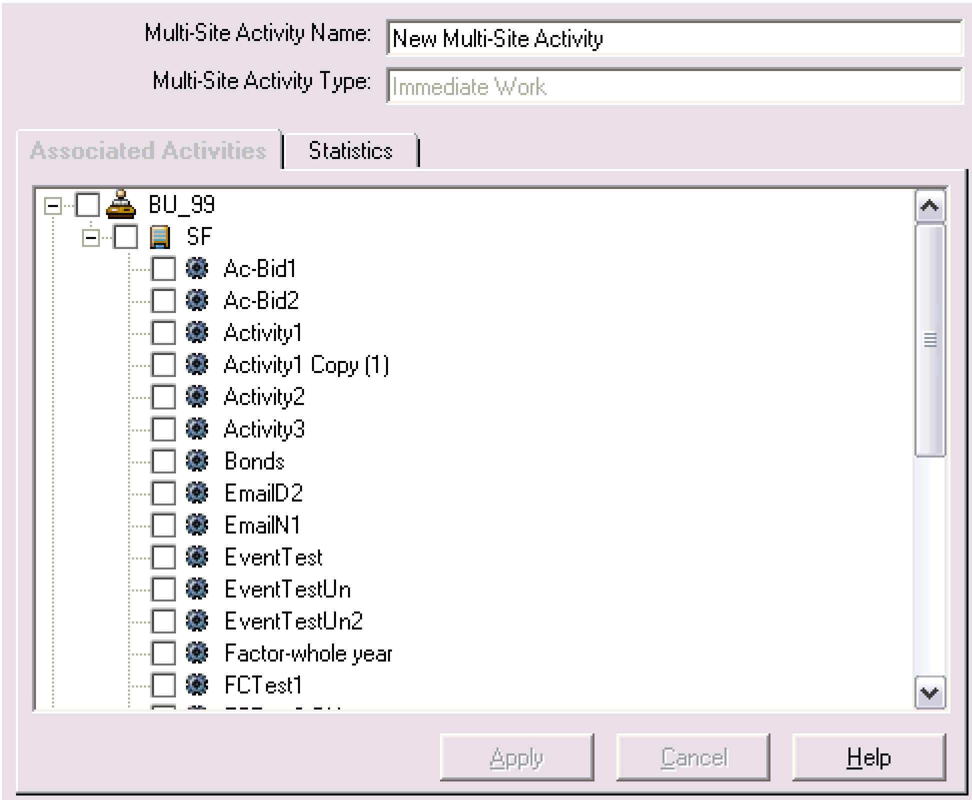


Figure 45: Multi-Site Activities configuration window

5. Enter a name for the multi-site activity. The name must be unique within the business unit.
6. Configure the activity as explained in Assigning Activities to a Multi-Site Activity and Configuring Statistics for a Multi-Site Activity.

Creating Activities and Multi-Site Activities Using Copy and Paste

To create a new activity or multi-site activity by copying and pasting an existing one:

1. Select an activity or multi-site activity.
2. Right-click it and then select **Copy Activity** or **Copy Multi-Site Activity.**
3. For an activity, right-click a site or any existing activity within that site and then select **Paste <*activity_name*> Copy.**

   For a multi-site activity, right-click a business unit or any existing multi-site activity within that business unit and then select **Paste <*activity_name*> Copy.**

The new activity or multi-site activity appears at the end of the objects list for the selected site or business unit.

Deleting Activities

To delete an activity:

1. Right-click the activity on the Objects pane.
2. Select **Delete** from the shortcut menu.

An "Are you sure?" dialog appears, and if the Activity is used in a Rotating Schedule, a second warning appears: "This activity is being used with Rotating Schedule(s): <list>. Do you want to delete this activity anyway?”

Note: You cannot delete an activity that appears in a schedule scenario or in the master schedule.

Skills Configuration for Activities

The figure below shows an example Skills tab in the Activities configuration window.

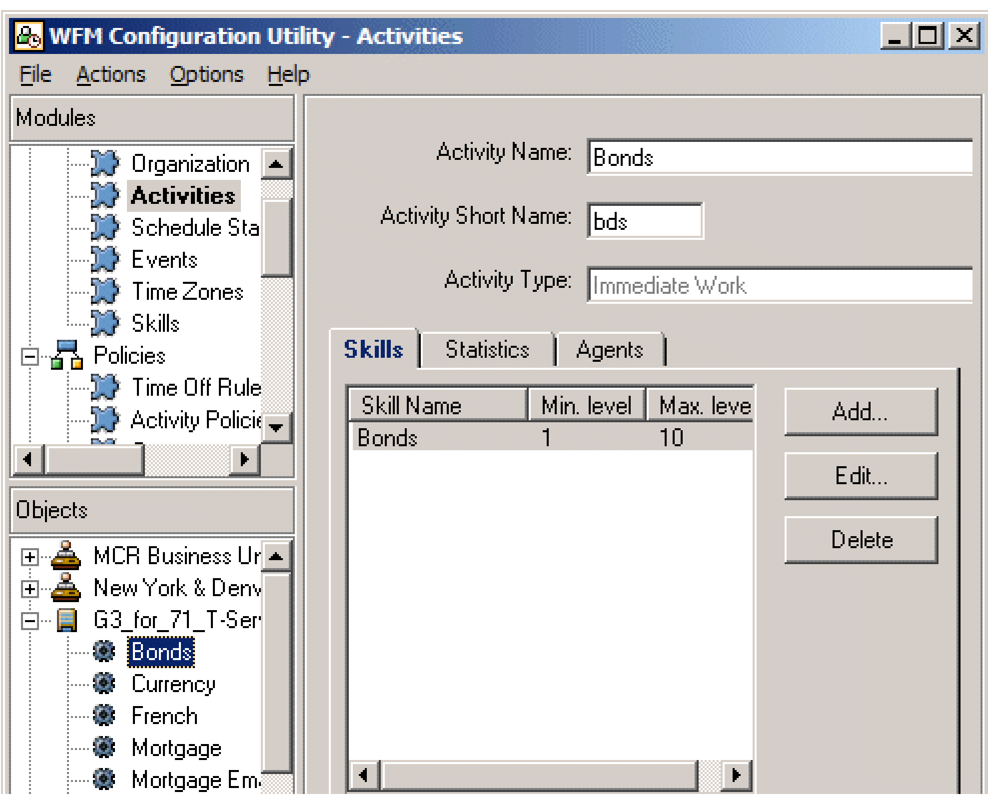


Figure 46: Activities Configuration window, Skills tab

Use this tab to add, edit, or delete skills that are associated with an activity.

- If you add a skill to an activity, only agents with that skill are scheduled for that activity.
- If you associate multiple skills with an activity, agents must have all of the skills to work on the activity.
- An activity may include more than one skill, or it may represent a particular skill level.

Note: Agents and skills are associated in Configuration Manager, not in the Workforce Manager Configuration Utility. Workforce Manager Skills are identical with Configuration Manager Skills objects and become available in Workforce Manager after synchronization with Configuration Manager.

Skills Security Features

Only the skills that the current user is authorized to access in Configuration Manager are visible.

If a user's security access has changed so that he or she can no longer access certain skills, those skills are still visible; but the user whose access was changed cannot add, delete, or modify them.

Adding, Modifying, or Deleting a Skill

To add or modify a skill:

1. Click **Add** or select a skill and click **Edit.**

   The Skill (Add) or Skill (Edit) window opens.
2. Enter or edit the skill information.
3. Click **OK.**

See Adding Skills to Activities and Editing Skills for Activities for more information.

To delete a skill:

1. Select the skill.
2. Click **Delete.**

Note: If you accidentally delete a skill, you can restore it by clicking **Cancel** before you click **Apply.**

Adding Skills to Activities

To add a skill to an activity:

1. Click **Add** from the Activities configuration window.

   The Skill (Add) dialog box opens.

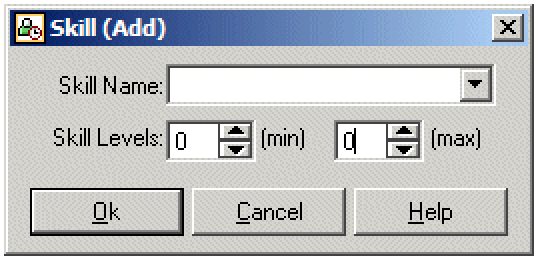


Figure 47: Skill (Add) dialog box

2. Select a skill from the Skill Name drop-down list.

Note: You must define skills in Configuration Manager before they appear in this list.

---

3. Assign the minimum and maximum skill levels.
   - **Min. Level**—A minimum skill level value required for an agent with this skill to perform this activity. Define whatever range is appropriate for each skill, such as 1 to10 or 1 to 100. The range should be consistent with the range used in Configuration Manager.
   - **Max. Level**—A maximum skill-level value required for an agent with this skill to perform this activity.
4. Click **OK.**

Editing Skills for Activities

To edit a skill:

1. Select the Skill in the Skills tab.
2. Click **Edit** from the Activity Skills pane. The Skill (Edit) dialog box opens.

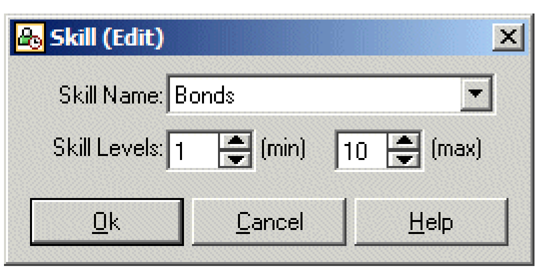


Figure 48: Skill (Edit) dialog box

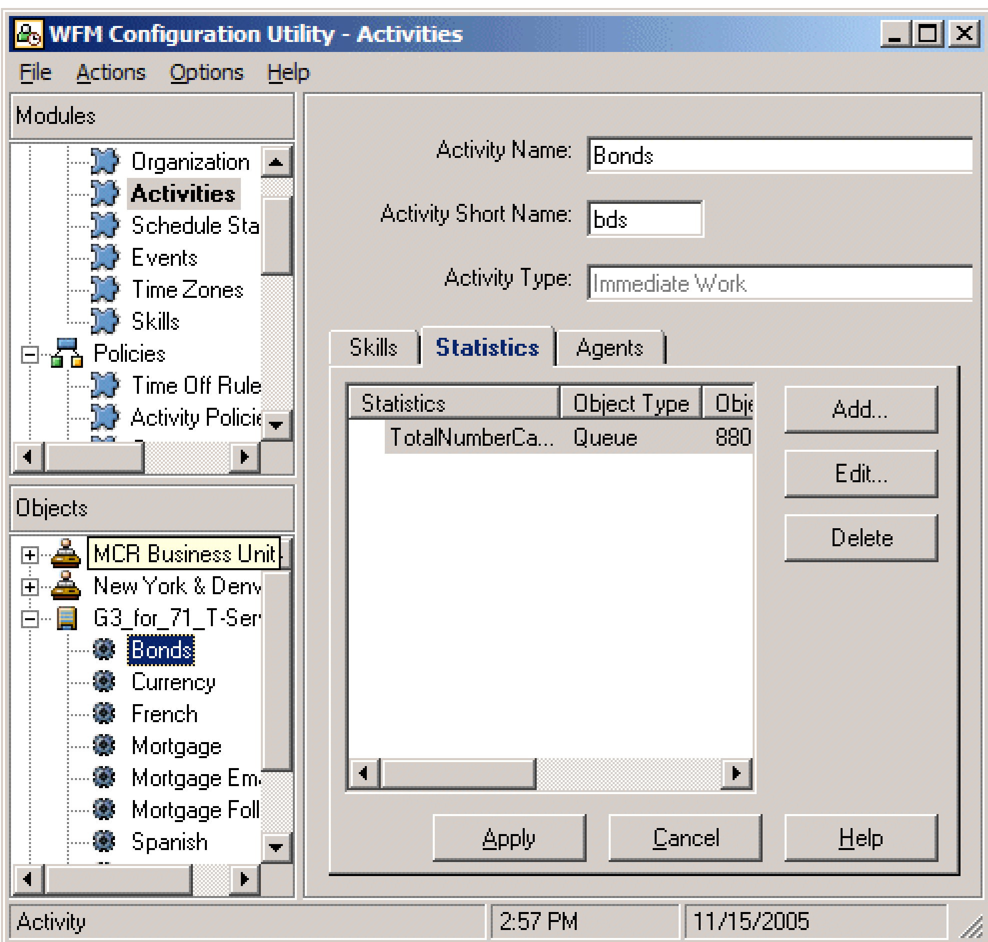
3. Select a different skill from the Skill Name drop-down list.

Note: You must define skills in Configuration Manager before they appear in this list.

4. Assign minimum and maximum skill levels.
   - **Min. Level**—A minimum skill level value required for an agent with this skill to perform this activity. Define whatever range is appropriate for each skill, such as 1 to10 or 1 to 100. The range should be consistent with the range used in Configuration Manager.
   - **Max. Level**—A maximum skill-level value required for an agent with this skill to perform this activity.
5. Click **OK.**

Statistics Configuration for Activities

You can associate Stat Server statistics with each activity using the Statistics tab.



Activities Configuration window, Statistics tab

Use these statistics to monitor interaction and service levels.

To associate statistics with activities, you must have configured the necessary statistics in Stat Server and configured a connection between Data Aggregator and Stat Server on the Data Aggregator Application Connections tab. The Data Aggregator–Stat Server connection must be active.

If you used the WFM Data Aggregator Configuration Wizard to set up Data Aggregator during installation, and selected the Wizard's Add WFM Statistics option, the statistics are already configured. In this case, they have the variant names (with WFM prefixed) listed in parentheses in the Statistics Options column of the Recommended Statistics Settings table.

For information on creating the Stat Server statistics manually, see the current *Workforce Management Administrator's Guide*, Chapter 6, "Creating New Stat Server Statistics" subsection.

Statistics tab properties are described below. Additional configuration information appears in Adding Statistics to Activities and Editing Statistics for Activities.

To add or edit activity statistics:

1. Select the activity in the Objects pane tree view.
2. Click the **Statistics** tab.
3. Click **Add** or select a statistic and then click **Edit.**

   The Statistic (Add) or Statistic (Edit) dialog box opens.

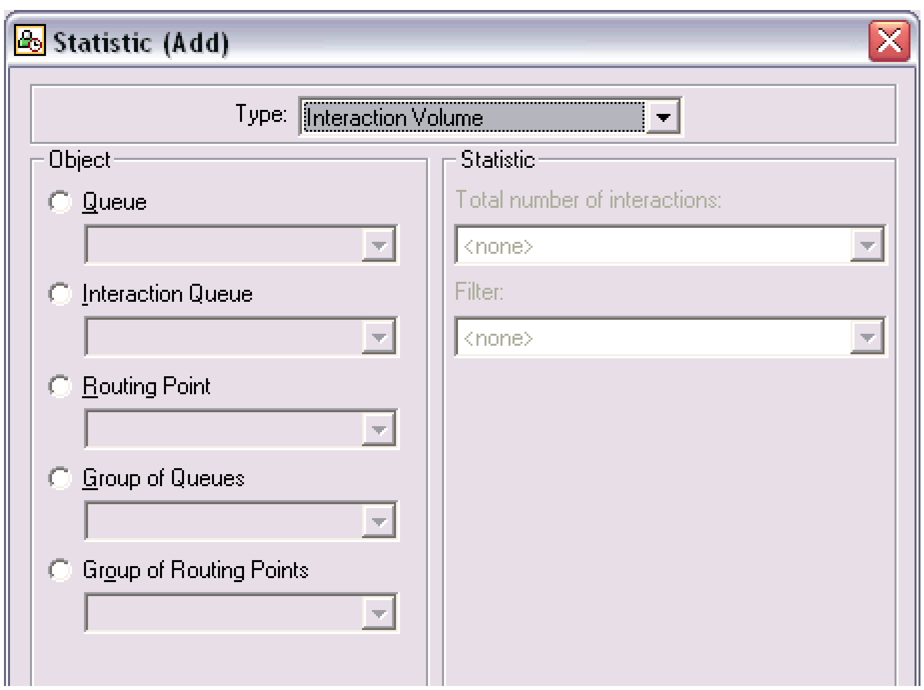


Figure 49: Statistic (Add) dialog box

4. Configure the statistic as necessary. See Adding Statistics to Activities or Editing Statistics for Activities for information on how to configure statistics.
5. Click **OK.**

To delete a statistic from an activity:

1. Select the activity in the tree view.
2. Click the **Statistics** tab.
3. Select the statistic that you want to delete.

   You can select only one statistic at a time.
4. Click **Delete.**

   No confirmation dialog box appears.
5. To confirm the deletion, click **Apply.** If you deleted the statistic incorrectly, click **Cancel.**

Note: Deleting a statistic from the Statistics window does not affect the statistic in Stat Server. You can select the statistic when creating new activities.

Statistics Tab Properties

Statistics—The Stat Server statistics that have been associated with the selected activity.

Object Type—The kind of object being monitored.

Object—The Queue, Interaction Queue, Routing Point, Group of Queues, Group of Routing Points, Group of Agents, or Group of Places being monitored.

Queue—All DNs of the ACD Queue and Virtual Queue types in the site.

Interaction Queue—Script objects of the Interaction Queue type.

Routing Point—All DNs of the Routing Queue and Virtual Routing Point types in the site.

Group of Queues—All DN Groups of the ACD Queue type in the site.

Group of Routing Points—All DN Groups of the Routing Points type in the site.

Group of Agents—All DN Goups of the Agent type in the site.

Group of Places—All DN Groups of the Place type in the site.

Filters—Optional values that define the interactions handled by the object more precisely. Used in contact centers with multiskilled agents. In most cases, filters require installation of Genesys Universal Routing Server (URS).

Type—One of the four standard statistic types that can be associated with each activity. Different combinations of the statistic types are drawn for Immediate and Deferred activity types. Fixed-Staff activities have no statistics.

The same statistics are used for configuring multi-site activities as for single-site activities.

Interaction Volume—Defines how to retrieve the number of interactions coming into the contact center for each activity. Used for Immediate and Deferred activities.

Abandonment Volume—Describes the number of interactions abandoned from the contact center for each activity. Used for Immediate activities.

Quality of Service—Used to compare the actual values with the service objectives projected in the schedule for each activity. This includes statistics that track service level and average time of answer (ASA). Used for Immediate activities.

Handle Time—Tracked for each activity and compared to the handle-time objectives defined in the forecast. Used for Immediate and Deferred activities.

Adding Statistics to Activities

When you *define* a statistic, you tell Data Aggregator which Stat Server statistics for which objects to monitor for each activity. You define multi-site activity statistics in the same way you define regular activity statistics.

Some activities may require multiple statistics definitions, for example, you may have to define statistics for each queue or group that performs this activity.

To configure a statistic for an activity:

1. In the Statistic (Add) dialog box, select a statistic type from the Type drop-down list box. The figure below shows the Statistics (Add) dialog box when Abandonment Volume is selected.When other Types are selected, the dialog box changes.

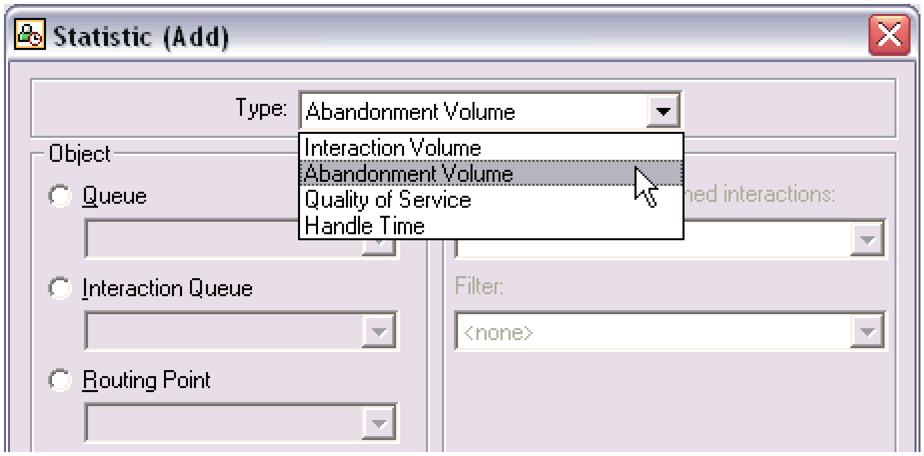


Figure 50: Statistics (Add) dialog box, Abandonment Volume selected

Statistic types are predefined. Not all statistics types apply to all activity types. Fixed staff activities do not use statistics. For explanations of the types, see Statistics Tab Properties.

2. Indicate the Object type by selecting the correct radio button. For example, **Queue**. Not all Object types are available for each statistic type.
3. Select the Object you want to be monitored from the drop-down list box under the selected Object type.
4. Select statistics you want to associate with the selected Object.

   See "Recommended Statistics Settings " on page 95 for the recommended statistics settings for each statistic type.
5. Select a Filter, if necessary.

   Filters are used in multiskilled contact centers to further clarify the object to be monitored. Filters are defined in Configuration Manager.
6. Select the Time Range(s) for Quality of Service statistics. You can select one or two time ranges. (not pictured

   Time Range is configured in Stat Server. See "Time Range" in the "Configuring Data Aggregator" section of the current *Workforce Management Administrator's Guide*.
7. To use Flexible Configuration Mode, which provides backward compatibility, select that check box.

> Note: Not every statistic is availble for every type. For examnple, Flexible Configuration Mode is not available for Abandonment Volume statistics.

8. To use the Use As Average option, select that check box.
9. Click **OK.**

Recommended Statistics Settings

Interaction Volume

Statistics Options TotalNumberCallsEntered (or WFMTotalNumberCallsEntered)

Available Objects Queue, Route Point, Group of Queues, Group of Routing Points, Interaction Queue

Abandonment Volume

Statistics Options TotalNumberCallsAband (or WFMTotalNumberCallsAband), TotalNumberShortAbandons, TimeRange

Available Objects Queue, Route Point, Group of Queues, Group of Routing Points, Interaction Queue

Quality of Service

Statistics Options ServiceFactor1 (or WFMServiceFactor1), AverTimeBeforeAnswering (or WFMAverTimeBeforeAnswering), TotalNumberCallsDistrib (or WFMTotalNumberCallsDistrib)

Available Objects Queue, Route Point, Group of Queues, Group of Routing Points, Interaction Queue

Handle Time

Statistics Options TotalNumberCallsHandled (or WFMTotalNumberCallsHandled), TotalHandleTime (or WFMTotalHandleTime)

Available Objects Group of Agents, Group of Places

Note: Statistics for the multimedia interaction queue depend on the interaction type (for example, the email, chat, and open media types will have different statistics). See the WFM Administration Guide.

Flexible Configuration Mode

For certain Types, the Activity Statistic (Add) dialog box includes a Flexible Configuration Mode check box for the Quality of Service, Handle Time, and Interaction Volume statistics categories.

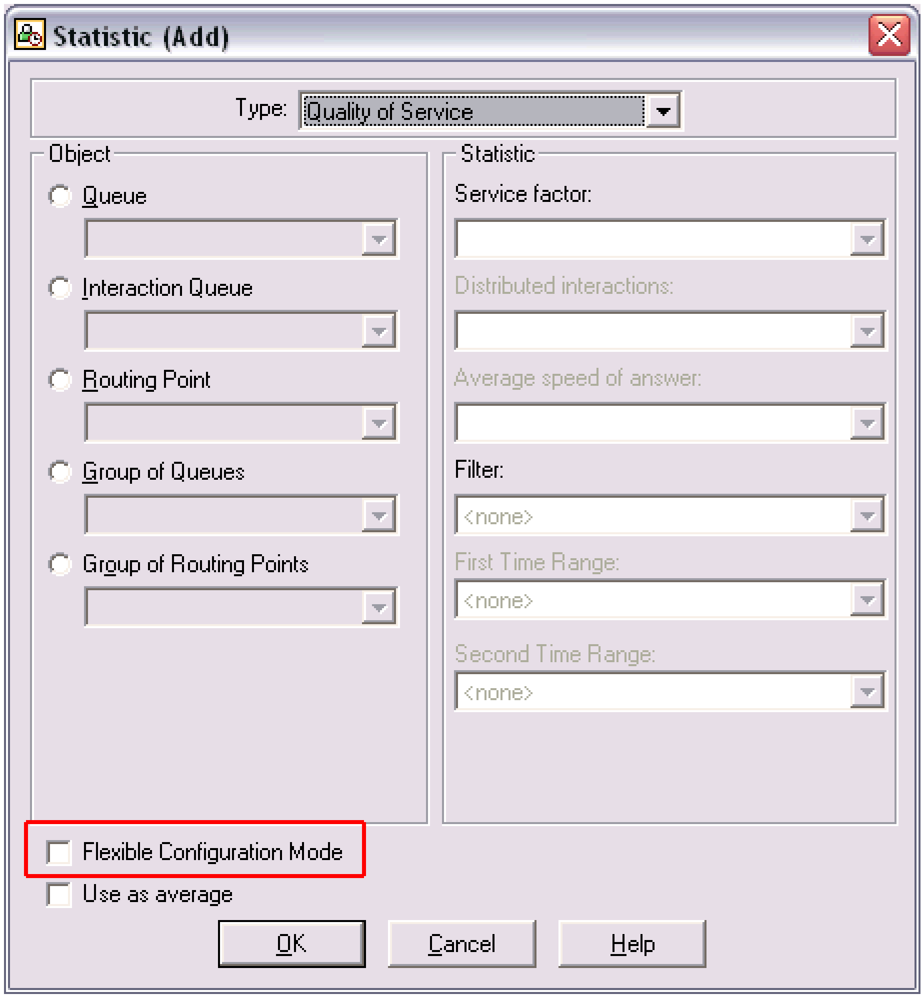


Figure 51: Flexible Configuration Mode

Select this check box if you need to support configuration settings from a previous release of WFM or to specify more complex statistical requests.

In Flexible Configuration Mode, if you select Interaction Volume or Handle Time, all Object types are available rather than only those shown in the table above. That is, you can select objects of the types queue, routing point, group of queues, group of routing points, group of agents, or group of places. The figure below shows an example.

If you select Quality of Service while in Flexible Configuration Mode, you can select statistics for average speed of answer alone.

If you are not in Flexible Configuration Mode, you must select one of these combinations:

- Service Factor, Distributed Interactions, and Time Range
- Distributed Interactions and Average Speed of Answer

- Service Factor, Distributed Interactions, Average Speed of Answer, and Time Range.

Statistics configured using Flexible Configuration Mode appear in the Statistics list with an exclamation mark icon next to them.

Note: If you select the Flexible Configuration Mode check box but do not configure any of the additional settings which then become available, the statistic is treated as if the Flexible Configuration Mode checkbox was cleared. No exclamation point icon appears next to the statistic in the Statistics list; and when you edit the statistic, the Flexible Configuration Mode check box is not selected.

Use As Average

This parameter tells Data Aggregator to record average values. Use it only for the Quality of Service and Handle Time statistics types.

For example, regular Handle Time statistics provide the total handle time divided by the number of interactions handled. If you select **Use As Average**, Data Aggregator simply records the total handle time, which it receives from Stat Server, and does not divide that value by the number of interactions.

Note: You can apply Use As Average only once per site for each statistic type.

Editing Statistics for Activities

To edit a statistic:

1. Select a statistic or statistics from the Statistics list (on the Statistics tab for the associated activity). The Statistic (Edit) dialog box opens.

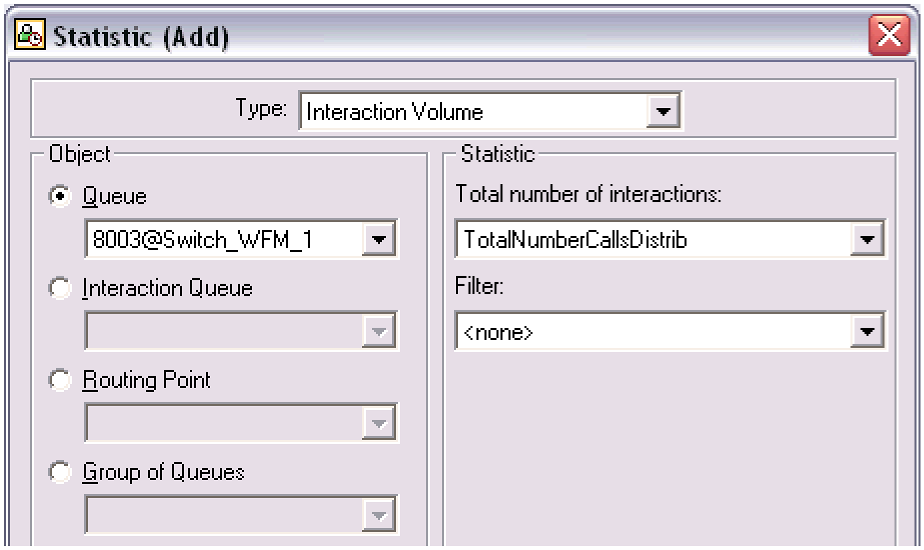


Figure 52: Statistic (Edit) dialog box

2. If necessary, change the statistic type using the Type drop-down list box.

   Statistic types are predefined. Not all statistics types apply to all activity types. Fixed staff activities do not use statistics. For explanations of the types, see Statistics Tab Properties.

3. If necessary, change the Object type by selecting the correct radio button.

   Not all Object types are available for each statistic type.

4. If necessary, change the Object you want to be monitored from the drop-down list box under the selected Object type.

5. If necessary, change the statistics you want to associate with the selected Object. See the table below for the recommended statistics settings for each statistic type.

6. If necessary, select a Filter or change the Filter selection.

   Filters are used in multiskilled contact centers to further clarify the object to be monitored. Filters are defined in Configuration Manager.

7. Select or change the Time Range(s) for Quality of Service statistics. You can select one or two time ranges.

   Time Range is configured in Stat Server. See "Time Range" in the "Configuring Data Aggregator" section of the current *Workforce Management Administrator's Guide*.

8. To use Flexible Configuration Mode, which provides backward compatibility, select that check box or clear the check box to disable this function.

   Note: This option is not available for Abandonment Volume statistics.

9. To use the Use As Average option, select that check box or clear the check box to disable this function.
10. Click **OK.**

Recommended Statistics Settings

Interaction Volume

Statistics Options TotalNumberCallsEntered (or WFMTotalNumberCallsEntered)

Available Objects Queue, Route Point, Group of Queues, Group of Routing Points

Abandonment Volume

Statistics Options TotalNumberCallsAband (or WFMTotalNumberCallsAband)

Available Objects Queue, Route Point, Group of Queues, Group of Routing Points

Quality of Service

Statistics Options ServiceFactor1 (or WFMServiceFactor1), AverTimeBeforeAnswering (or WFMAverTimeBeforeAnswering), TotalNumberCallsDistrib (or WFMTotalNumberCallsDistrib)

Available Objects

Queue, Route Point, Group of Queues, Group of Routing Points

Handle Time

Statistics Options TotalNumberCallsHandled (or WFMTotalNumberCallsHandled),

TotalHandleTime (or WFMTotalHandleTime)

Available Objects Group of Agents, Group of Places

Flexible Configuration Mode

The Activity Statistic (Edit) dialog box includes a Flexible Configuration Mode check box for the Quality of Service, Handle Time, and Interaction Volume statistics categories. Select this check box if you need to support configuration settings from a previous release of WFM or to specify more complex statistical requests.

In Flexible Configuration Mode, if you select Interaction Volume or Handle Time, all Object types are available rather than only those shown in the table above. That is, you can select objects of the types queue, routing point, group of queues, group of routing points, group of agents, or group of places.

If you select Quality of Service while in Flexible Configuration Mode, you can select statistics for average speed of answer alone. If you are not in Flexible Configuration Mode, you must select a one of these combinations:

- Service Factor, Distributed Interactions, and Time Range
- Distributed Interactions and Average Speed of Answer
- Service Factor, Distributed Interactions, Average Speed of Answer, and Time Range.

Statistics configured using Flexible Configuration Mode appear in the Statistics list with an exclamation mark icon next to them.

Note: If you select the Flexible Configuration Mode check box but do not configure any of the additional settings which then become available, the statistic is treated as if the Flexible Configuration Mode checkbox was cleared. No exclamation point icon appears next to the statistic in the Statistics list; and when you edit the statistic, the Flexible Configuration Mode check box is not selected.

Use As Average

This parameter tells Data Aggregator to record average values. Use it only for the Quality of Service and Handle Time statistics types.

For example, regular Handle Time statistics provide the total handle time divided by the number of interactions handled. If you select **Use As Average**, Data Aggregator simply records the total handle time, which it receives from Stat Server, and does not divide that value by the number of interactions.

You can apply Use As Average only once per site for each statistic type.

Activities Agents Tab

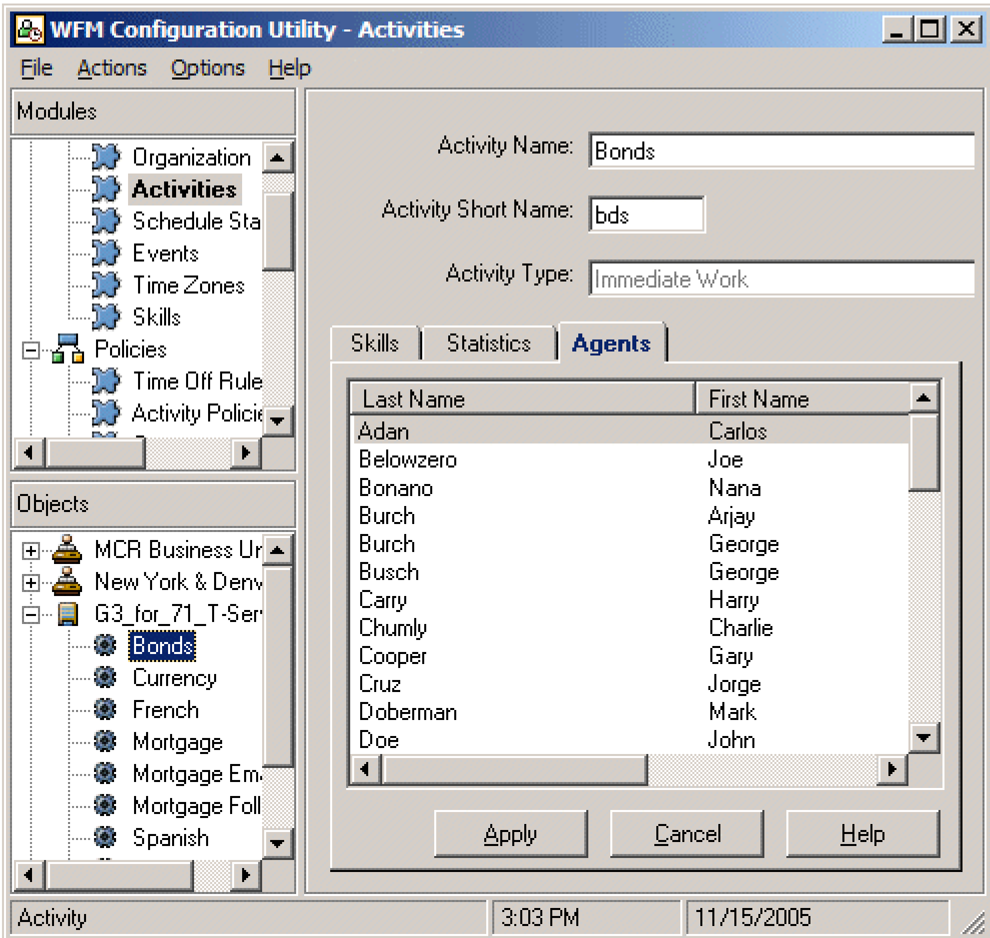


Figure 53: Activities Configuration window, Agents tab

This tab contains a read-only pane that displays the agents associated with the activity.

You cannot associate agents with activities directly. Agents are associated with activities if their skills and the skills required for the activity match.

To adjust which agents are associated with an activity, change the skill settings for either:

- The agent, using the Agent Information tab under the Organization module. See Configuring Agents for more information.
- The activity, using the Skills tab under the Activities module. See Skills Configuration for Activities for more information.

Assigning Activities to A Multi-Site Activity

Multi-Site activities are regular activities which are performed at specific contact centers that are being combined, for tracking purposes, into a single multi-site activity associated with a business unit.

To assign regular activities to a multi-site activity:

Click the Activities module and then select the business unit in the Object pane tree view.

- To create a new multi-site activity, right-click the business unit and select **New Multi-Site Activity.**

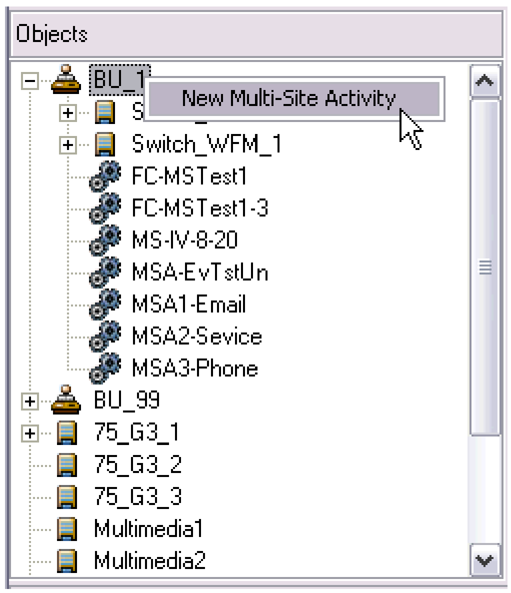


Figure 54: Select New Multi-Site Activity

Edit an Existing Multi-site Activity

1. Select the existing multi-site activity on the Object pane tree view.

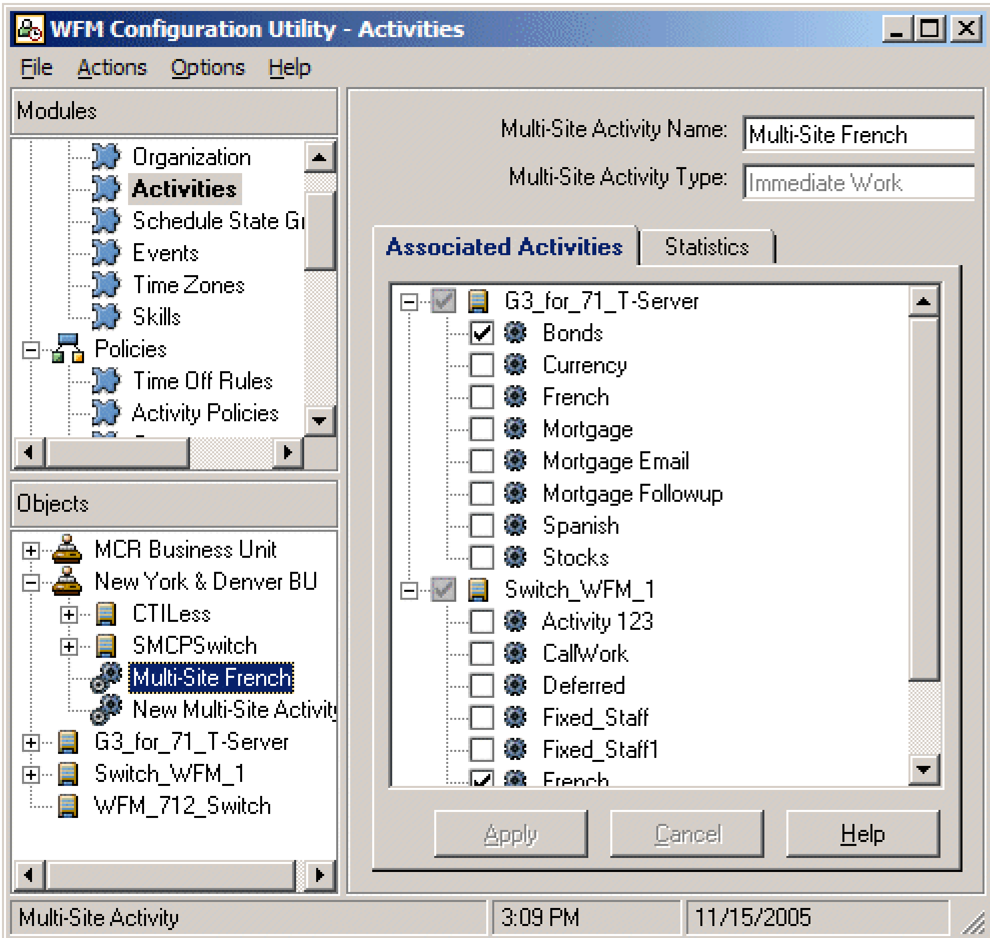


Figure 55: Selecting an existing multi-site activity

2. In the Multi-Site Activity window, change the multi-site activity name, if necessary. The name must be unique within the business unit.
3. In the Associated Activities pane, select the check boxes for the activities you want to associate with the multi-site activity.
   - To remove an activity, clear its checkbox.
   - To select all activities at a site, select the checkbox next to the site name.

Note: An activity can belong to only one multi-site activity. Only activities for the selected business unit and independent sites are available. Activities for other business units do not appear.

4. Click **Apply.**

After assigning activities, click the Statistics tab to configure the statistics you want to be tracked for the multi-site activity. See Configuring Statistics for a Multi-Site Activity for details.

Configuring Statistics for a Multi-Site Activity

You define multi-site activity statistics the same way you define regular activity statistics.

For basic information about activities, activity types, and how to configure activities, see Statistics Configuration for Activities.

To configure a multi-site activity

1. Select the appropriate activity on the Objects pane.
2. Click the Statistics tab.

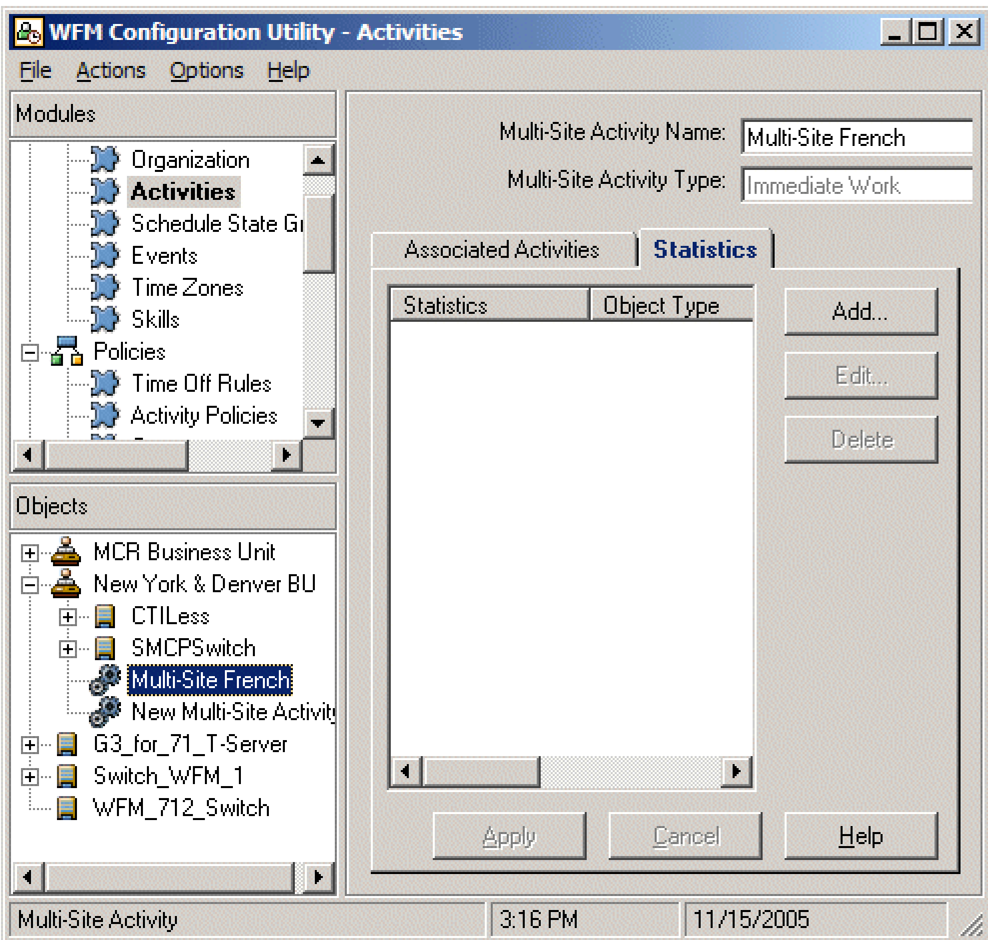


Figure 56: Multi-site Activity, Statistics tab

3. Click **Add** to create a new statistic for the activity or select one or more statistics and then click **Edit** to modify the selected statistic(s).

For further information on how to add or edit statistics for a multi-site activity, see Adding Statistics to Activities or Editing Statistics for Activities.

Grouping Multiple Activities

A user can group together multiple selected activities from within the same business unit, or from an independent site, for the purpose of data aggregation for contact center performance monitoring and reporting.

To Create and Configure a New Activity Group

- Right-click a business unit in the Objects pane and select New Activity Group from the menu.

  The new activity group appears in the Objects pane, below all activities, with the name New Activity Group (followed by a number in parentheses if that name is taken).

To Configure an Activity Group

1. Select the group in the Object pane.
   (Notice the plus sign (+) in the icon, which identifies it as an Activity Group.)

   The Activity Group is highlighted and the Data pane displays a list tree of Activities that you can assign to the selected group.
2. To assign activities to the selected group, select the appropriate check box(es) in the data pane.

   To change the group's name, use the editable field Activity Group Name at the top of the data pane.
3. Click the Apply button.

The Cancel and Help buttons function as they do throughout Workforce Management.

To Copy, Delete, or Paste a Selected Activity Group in the Object Tree

- Right-click the group in the Object pane and select an action from the drop-down menu.

  New Activity Group behaves as described above.

  Edit Activity Group populates the Data pane if it is not already displaying the selected group's data.

  Delete Activity Group displays an approval dialog box and removes the selected group if you approve.

Copy Activity Group places a duplicate of the selected group on the clipboard.

Paste group name Copy pastes the clipboard contents to a new group in the Objects pane, named group name Copy (n), where n=1 unless that name already exists. The Paste command appears only if you have used Copy to populate the clipboard.

Notes about the Paste command

- When you paste an activity group into a different business unit, only activities and multi-site activities from independent sites that were associated with the copied activity group are associated with the pasted activity group.
- When you paste an activity group into the same business unit, all activities and multi-site activities that were associated with the copied activity group are associated with the pasted activity group.

Schedule State Groups

Overview

A s*chedule state group* is a collection of schedule states that is linked to a site.

See Configuring Schedule State Groups for information about such groups and for how to create, edit, and delete them.

See Configuring Adherence Rules for information on setting adherence rules for schedule state groups.

Configuring Schedule State Groups

If you selected Generate Default Schedule State Groups and Exception Types when you imported the site, these Schedule State Groups appear automatically:

- Asynchronous Work, Days Off, Exception Types, Fixed-Staff Work, Immediate Work, No Activity, Shift Items/Meals, Time Off

The Schedule State Group window enables you to create a new schedule state group, copy and paste an existing schedule state group to create a new one, edit, and delete schedule state groups.

Schedule State Groups and Genesys Events

Each schedule state group is associated with one or more Genesys events, such as CallRinging or WaitForNextCall. Each group can include an additional reason (aux) code, sent with the related Genesys event, that further identifies what the agent is doing.

Note: Aux codes are not supported for all Genesys events. Which Genesys events support aux codes depends on the T-Server you are using. Check the documentation for your T-Server to determine which of the Genesys events that it sends can support aux codes.

You can apply the Start Before Threshold and Start After Threshold threshold values to each schedule state group; these values help you track agent adherence.

You can configure these functions on the Adherence Rules tab.

About Schedule States

The schedule states that you can include in schedule state groups are:

- All breaks configured for the site
- All meals configured for the site
- All activities configured for the site
- All exception types configured for the site
- All time-off types configured for the site
- Fixed states, which are:
    - Generic break, meal, exception, and activity states that you can use in place of specific meals, breaks, exceptions, and activities.
    - Day Off, Vacation, No Activity

Note: Use Fixed States to report what an agent is scheduled for, when a particular schedule state type (such as an exception type) has been deleted from WFM.

When you select a schedule state group or create a new one, the Schedule State Group window opens. One pane shows all the available schedule states and the other pane shows the schedule states included in the schedule state group.

Preset Schedule State Groups

Schedule state groups from a previous release of Workforce Management are brought into the WFM Configuration Utility as pre-configured groups. The default groups are:

- Asynchronous Work, Days Off, Exception Types, Fixed-Staff Work, Immediate Work, No Activity, Shift Items/Meals, Time Off

You can edit or delete these groups.

Note: Users of previous releases of WFM will notice that the formerly-used Vacation schedule state group no longer exists. Instead, Vacation is now a default time-off type within the Time Off schedule state group. All previously-configured Vacation schedule state groups are migrated into the automatically-created Vacation time-off type.

Creating New Schedule State Groups

1. Click **Schedule State Groups** on the Modules pane and then select a site on the Objects pane.
2. On the Objects pane, right-click either the site to which you want to add the schedule state group or any existing schedule state group in that site and then select **New Schedule State Group** from the shortcut menu.

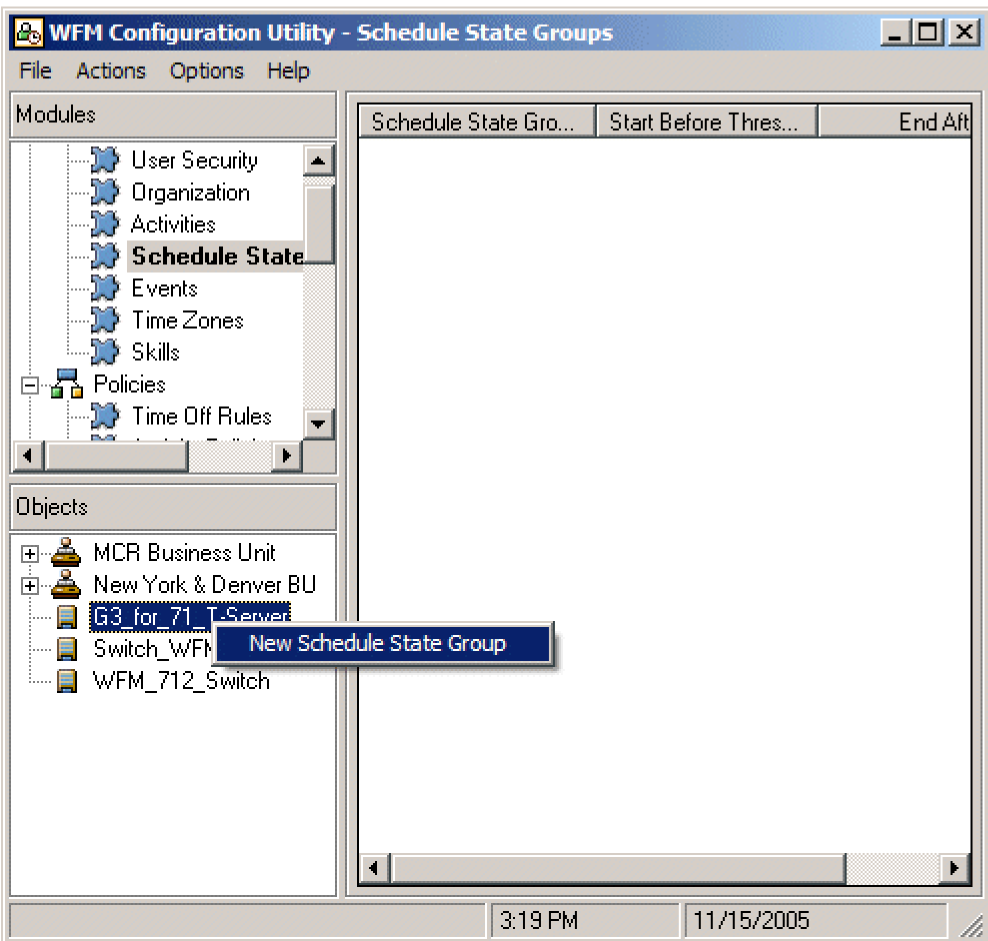


Figure 57: Selecting New Schedule State Group

The Schedule State Groups configuration window opens.

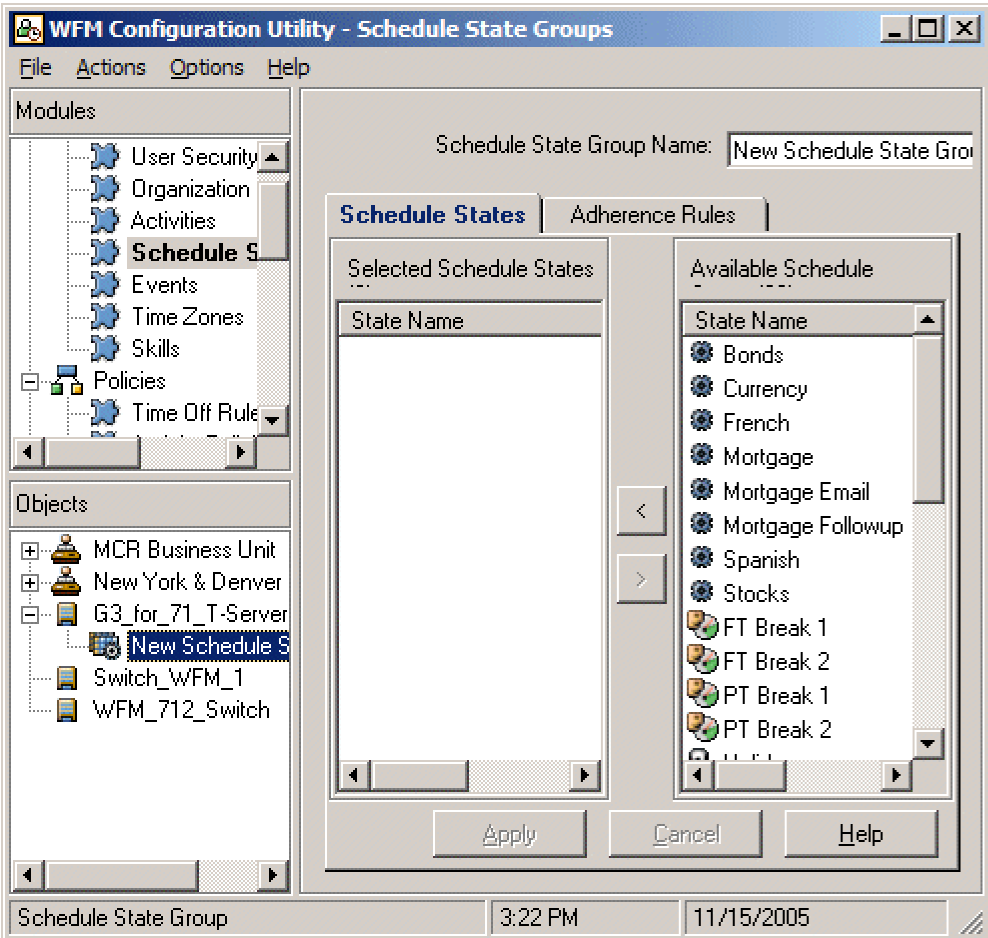


Figure 58: Schedule State Groups configuration window

3. Enter a name for your schedule state group. It must be unique within the site.
4. Move the schedule states that you want to be included into the Selected list pane by selecting the schedule states one at a time and then clicking the < button.

   To remove one schedule state, select it and click > to return it to the Available Schedule State pane.
5. When you have finished adding schedule states, click **Apply.**
6. Click the Adherence Rules tab to continue configuration of this schedule state group. See Configuring Adherence Rules for more information.

Creating Schedule State Groups Using Copy and Paste

To create a new schedule state group by copying and pasting an existing one:

1. Select a schedule state group.
2. Right-click it and then select **Copy Schedule State Group.**
3. Right-click a site or any existing schedule state group within that site and then select **Paste <*schedule_state_group_name*> Copy.**

The new schedule state group appears at the end of the objects list for the selected site.

Editing Schedule State Groups

You can edit any schedule state group, whether it is pre-set or user-created.

To edit a schedule state group, select it on the Objects pane and make the changes.

1. Change the schedule state group name, if necessary. It must be unique within the site.
2. Move the schedule states that you want to be included into the Selected list pane by selecting the schedule states one at a time and then clicking the < button.

   To remove one schedule state, select it and click > to return it to the Available Schedule State pane.
3. When you have finished adjusting which schedule states are included, click **Apply.**
4. Click the Adherence Rules tab, if necessary, to continue reconfiguration of this schedule state group. See Configuring Adherence Rules for more information.

Deleting Schedule State Groups

To delete a selected Schedule State Group from the Objects pane:

1. Right-click it.
2. Select **Delete** from the shortcut menu that appears.
3. Click **OK** to confirm.

The schedule state group disappears and any schedule states included in it now appear on the Available Scheduled State pane.

Configuring Adherence Rules

You can configure adherence rules for each schedule state group within a site. These rules tell Data Aggregator what standards to use when monitoring agent performance. The figure below shows the Adherence Rules tab.

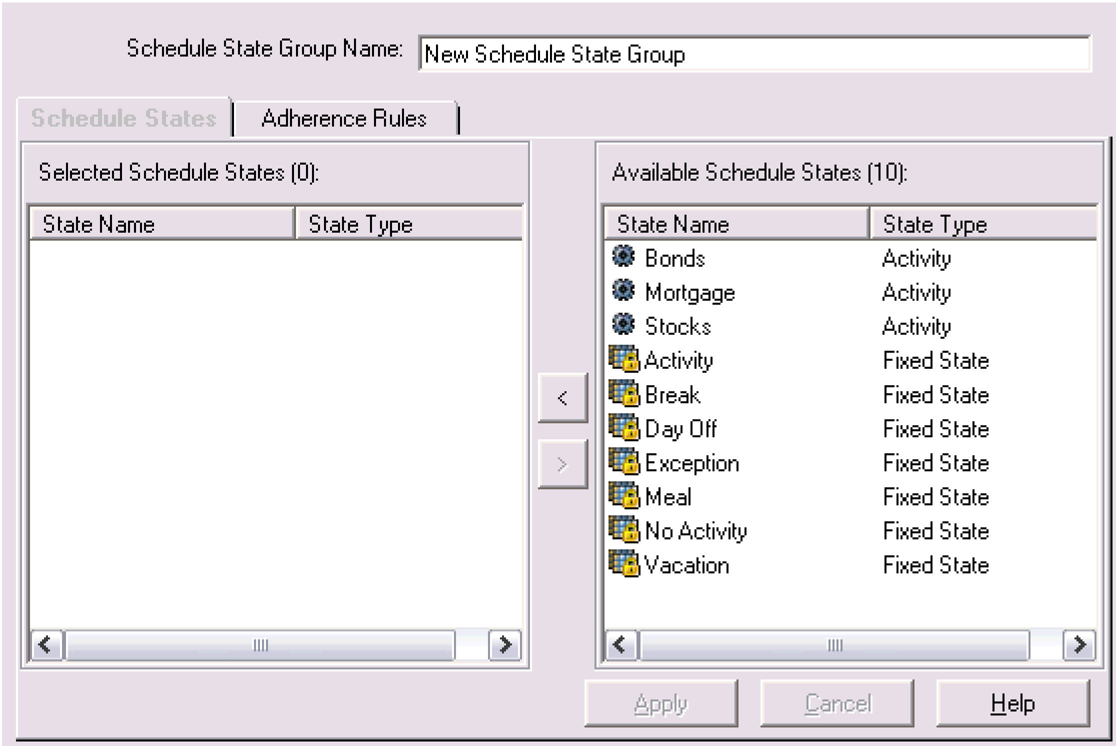


Figure 59: New Scheduled State Group, Adherence Rules tab

Use the Adherence Rules tab to:

- Associate Genesys events with schedule state groups.
- Add appropriate reasons (aux codes).
- Set thresholds for the acceptable amount of flexibility in scheduled state start and end times.

  Thresholds indicate how many minutes early or late an agent can transfer to a scheduled state without being considered *nonadherent*.

  For example, an agent is scheduled to start a shift at 12:00 PM and the Start Before threshold is set for 5 minutes. If the agent starts the shift at 11:54 AM, which is beyond the 5-minute threshold, it is written to the database and appears on the adherence reports as a nonadherent event.

Setting Adherence Rules

To set adherence rules for a schedule state group:

1. Click **Schedule State Groups** on the Modules pane and then select a schedule state group within a site on the Objects pane.
2. Click the Adherence Rules tab.
3. If necessary, you can change the schedule state group name on this tab.

4. Click the drop-down arrow next to any row in the Current State column to open a list of Genesys events.
   - Select the event that should be associated with this schedule state group.
   - Continue adding rows as necessary.
   - To remove a Genesys event from the Current State column, select it and then click **Delete.**

Note: You can associate a Genesys event with any number of schedule state groups.

5. Add reasons (aux codes), if necessary, by typing the appropriate code into the Reason Code column for the appropriate Genesys event.

   A *reason* is user-specified information that supplements schedule state information. A reason helps to define the precise nature of the schedule state group to which it is attached.

   Reasons do not apply to all Genesys events. Refer to your Genesys Stat Server documentation for additional information.

6. Set the adherence threshold levels for the schedule state group. These rules define agent adherence parameters.

   Agents are *adherent* if their start time and end time are within threshold intervals for that scheduled state.

   For example, if the schedule requires agents to work from 12:00–1:00 and both thresholds are set to 5 minutes, an agent who starts at 11:55 and ends at 1:04 is *adherent*. Agents who start and/or end outside the configured thresholds are either *nonadherent* or *severely nonadherent*.

Note: You can configure the setting that marks the cut-off between nonadherence and severe nonadherence in the Alarm Threshold combo box on the Site Properties window of the Organization module. See Site Properties for details.

   Start Before Threshold—Duration of time considered to be adherent time before the start of a schedule state. Valid values are 0–20. The default value is 20.

   End After Threshold—Duration of time considered to be adherent time after the end of a schedule state. Valid values are 0-20. The default value is 20.

7. Click **Apply** to save the adherence rules.

Events

Overview

Events are specific instances of factors.

A *factor* is anything that can be expected to affect the daily interaction volume of the enterprise and, therefore, staff and schedule requirements.

An *event* is a specific instance when a factor is in effect.

Using the Events module, you can create and configure factors as well as creating and configuring events.

You configure factors and events separately for each site and business unit. You do not need to have events in order to create forecasts, but with them you can fine tune interaction volume forecasts.

Note: Because factors are used as building blocks for events, all factors must be created before events. Because the definition of factors includes specific activities that will be affected, you must define activities before factors.

Creating Factors

You can either create an entirely new factor or create a new one by copying and pasting an existing factor.

To create a new factor:

1. Click **Events** on the Modules pane. From the Objects pane tree view, right-click a site, business unit, or an already-existing factor.
2. Select **New Factor** from the shortcut menu. Or click the Actions menu and select **New Factor**.

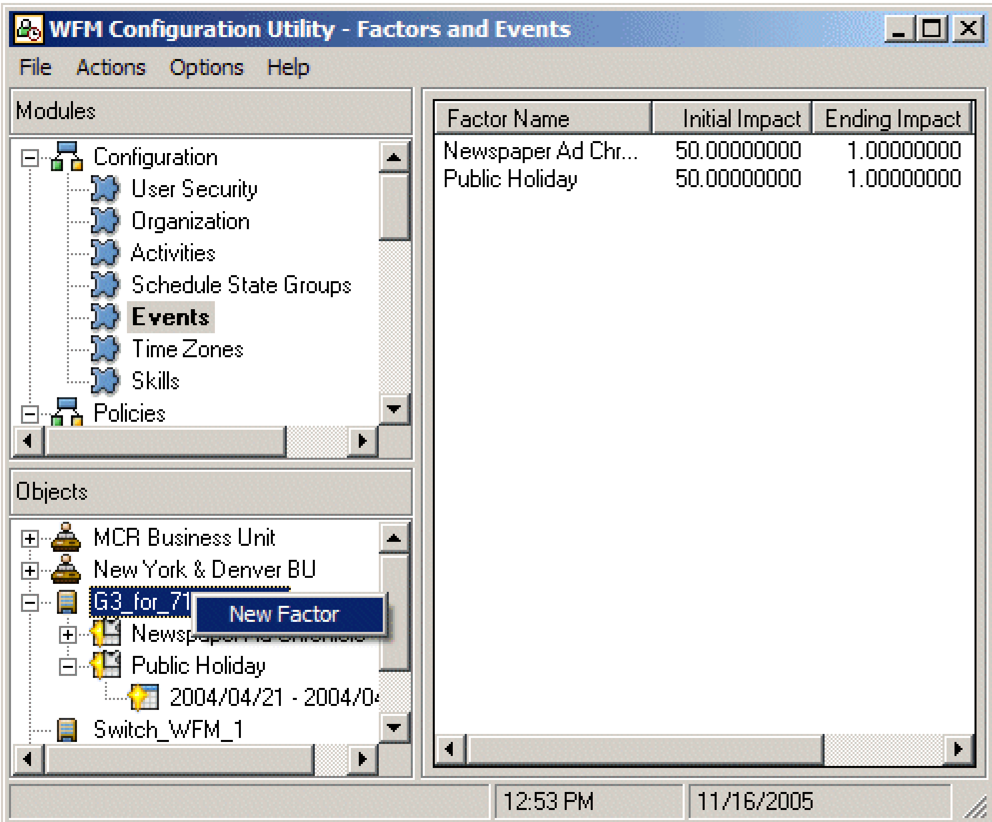


Figure 60: Creating a New Factor

To copy and paste an existing factor:

1. Select a factor.
2. Right-click it and then select **Copy Factor.**
3. Right-click a site or any existing factor within that site and then select **Paste <*factor_name*> Copy.**

Whichever method you use, a new object appears in the branch beneath the site, bearing the default name *New Factor.*

Enter the appropriate information on the Factor Properties and Impact tabs.

Creating Events

You can either create an entirely new event or create a new one by copying and pasting an existing event.

Click **Events** on the Modules pane. From the Objects pane tree view, right-click a factor or an already-existing event.To create a new event:

Select **New Event** from the shortcut menu. Or click the Actions menu and select **New Event**.

Enter the appropriate information on the Event Properties pane.

To copy and paste an existing event:

1. Select an event.
2. Right-click it and then select **Copy Event.**
3. Right-click a factor or any existing event under that factor and then select **Paste <*event name*> Copy.**

Enter the appropriate information on the Event Properties pane.

Configuring Events

After you have configured a factor affecting a site, create events that will be based on the factor. Configure the new event according to the Event Properties explanations (below).

Note: Workforce Manager allows a distinction between the dates and times when an event starts and the dates and times when the event has an impact on operations. These ranges can coincide but are not necessarily the same.

Event Properties

Start Date—The start date of the Event. In this field, type the date or select it from the drop-down calendar.

Start Time—The start time of the event. If you enter an invalid range, Configuration Utility corrects to the nearest valid time.

End Date—The end date of the event.

End Time—The end time of the event.

Disregard Historical Data—When selected, historical data for the event date and time is disregarded when a forecast is created. Use Disregard Historical Data when you want to avoid bad (usually zero) data. When the existing historical data is satisfactory, configure events to rely upon historical data.

Impact Start Date—The date when the event actually has an impact on contact center operations.

Impact Start Time—The time when the event actually has an impact on contact center operations.

Note: Workforce Manager assumes that the event impact end date and end time always coincide with the conclusion of the event.

Attribute Value—Each event has a specific attribute value. This value should reflect the actual content of the event, for example, the number of catalogs in a catalog mailing or the minutes of airtime of a radio ad. Attribute value effect is calculated by multiplying the attribute value by the beginning and ending percent impact, as set on the Factor Properties tab.

For example, to define the Event Attribute as 100,000 catalogs mailed, enter 100 in the Event Attribute box. To configure an initial impact of 10 percent of the forecasted interaction volume, enter 0.1 in the Factor Properties initial impact percentage box. If the specific event is a mailing of 200,000 catalogs, then enter 200 in the Event Attribute box. In this case, the beginning impact would be 20 percent.

It is also possible to configure the attribute in the opposite manner. If the initial impact percentage is set to 10 percent, the Event Attribute value is 1 for a 100,000 catalog mailing. For 200,000 catalogs, the Event Attribute value is 2 and the resulting initial impact percentage will be 20 percent. For 50,000 catalogs, the Event Attribute value is 0.5 and the resulting initial impact percentage is 5 percent.

Factor Properties

The figure below shows the Factor Properties tab in the Factors and Events configuration window.

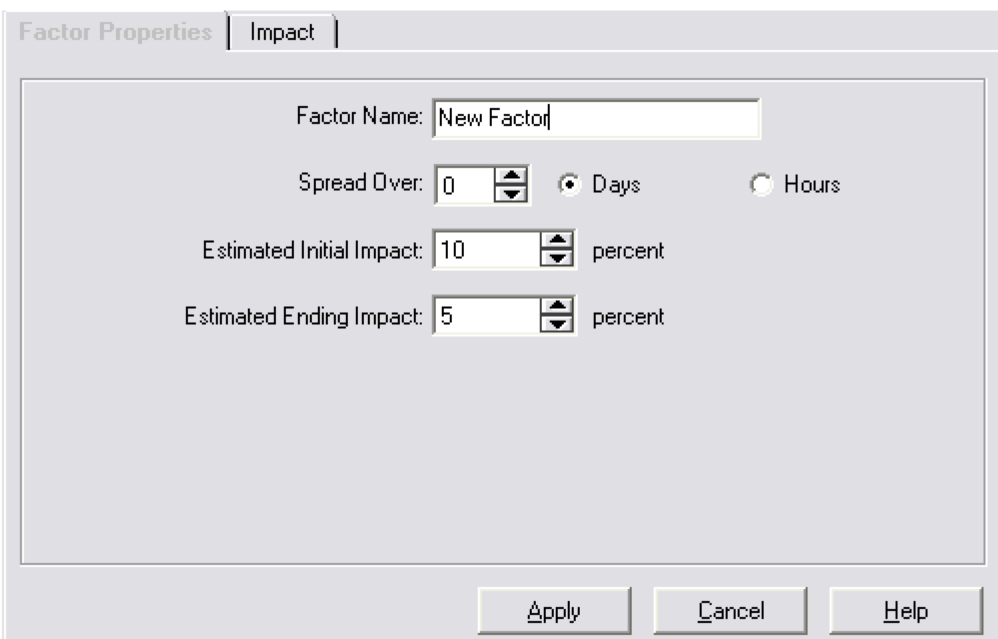


Figure 61: Factor Properties tab

Use the Factor Properties tab to enter details about factors and their expected impact on operations.

1. Enter factor information (based on the explanations below).
2. Click **Apply.**

Factor Name—The name of the factor. Names should be as descriptive as possible, for example, *TV Ad*, *Marketing Campaign*, *Holiday Season*, *Sale*.

Spread Over—The estimated number of days or hours that this factor can have an impact on the contact center. The maximum valid number is 1000.

Estimated Initial Impact—The estimated initial impact of the factor, expressed as a percentage. In this field, type or select the number you want to use for an event with an attribute value of 1. See Events Attribute Value for more information on how to configure this setting.

Estimated Ending Impact—The estimated ending impact of the factor, expressed as a percentage. In this field, type or select the number you want to use.

Factor Impact

The figure below shows an example Impact tab in the Factors and Events configuration window.

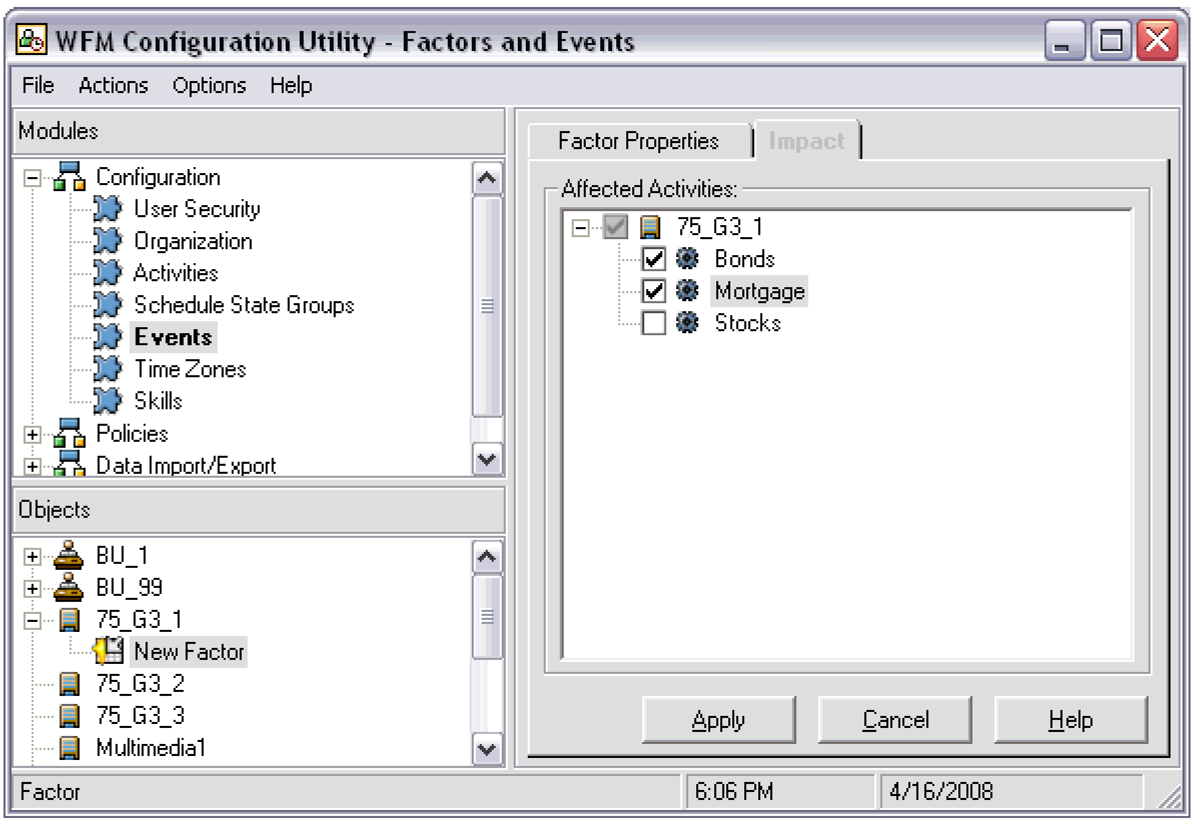


Figure 62: Factor Impact window

Use the Factor Impact window to specify which activities a factor affects. Forecasting can then accurately predict the effect a specific instance of the factor—an event—has on interaction volumes.

Only activities configured for a particular site, or multi-site activities configured for a particular business unit, are available to associate with factors affecting that site or business unit.

To associate activities with a specific factor:

1. Select the check box(es) next to the activity name(s).
2. Click **Apply.**

Time Zones

Overview

Time zones are set up in Configuration Manager and then brought into Workforce Management using one of two methods:

- Manual Synchronization
- Editing the Time Zones list

Once they have been brought into Workforce Management, you can associate them with objects, such as sites. You make the association when you are configuring an object.

You can:

- Set a default time zone, which Workforce Management applies to all objects that do not have a manually-set time zone.
- Configure seasonal updates, such as daylight saving time offsets.

Time Zones List

When you select the Configuration Time Zones module in the Modules pane, the Time Zones window opens. The Data pane contains two lists, WFM Configuration Utility Time Zones and Configuration Manager Time Zones.

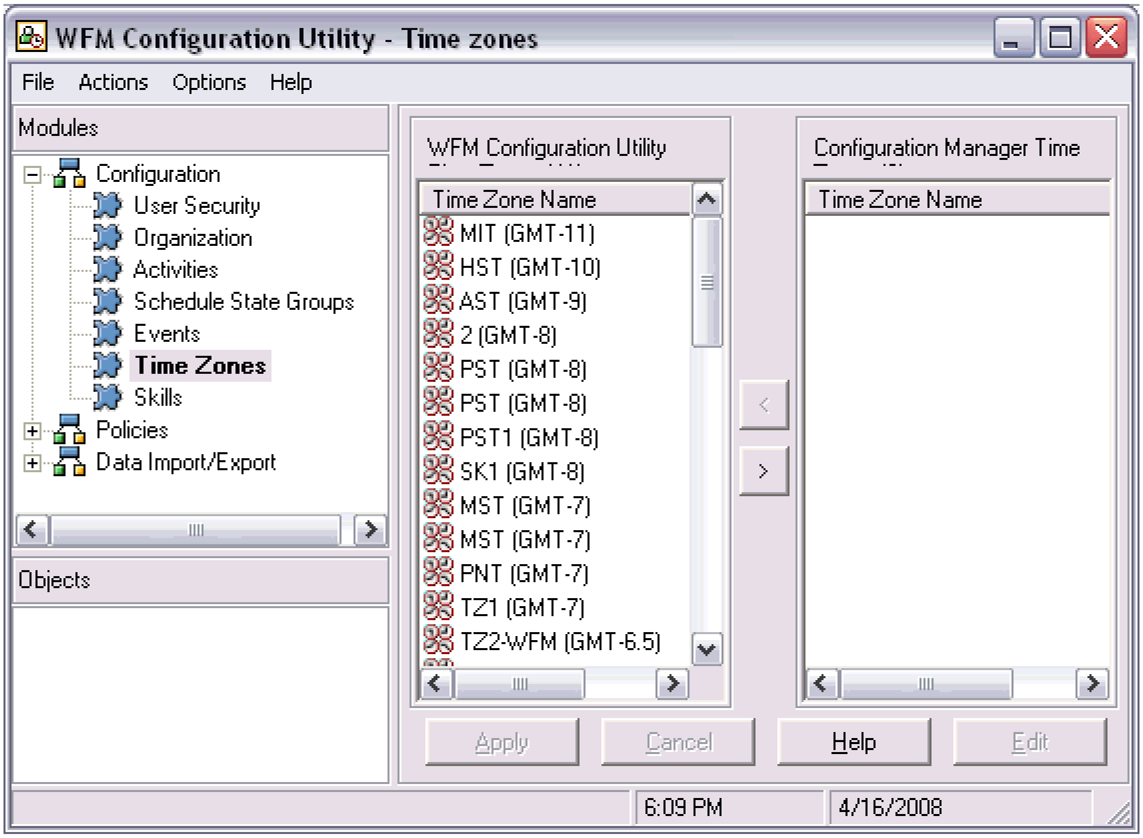


Figure 63: Time Zones list

- The Configuration Manager Time Zones pane lists all time zones configured in Configuration Manager.
- WFM Configuration Utility Time Zones shows all time zones selected for use in Workforce Management. You can only apply time zones that are in the WFM Configuration Utility Timezones pane to WFM objects, such as sites or business units.

To move a time zone from one pane to the other:

1. Select one or more time zones and click the arrow button that points toward the pane in which you want the time zone to appear.
2. After making all changes, click **Apply** to save them or **Cancel** to discard them.

Note: You can only remove a time zone from the WFM Configuration Utility Timezones list if no business unit or site uses it.

Synchronizing Time Zones

To transfer all time zones configured in Configuration Manager into Workforce Management, perform a manual synchronization.

Note: Manual synchronization overrides the daylight saving settings you have configured for time zones unless you selected **Do Not Synchronize** when you configured your daylight saving offset. See Configuring Time Zones for this procedure.

Editing Time Zones

You can only edit time zones that are included in the WFM Configuration Utility Timezones list.

To edit a time zone:

1. Select it and then click **Edit.**

   The Daylight Saving Time dialog box opens. See Configuring Time Zones for information on how to configure the settings.

2. When you are done editing time zones, click **Apply** to save your changes or **Cancel** to discard them.

Time Zone settings

Each seasonal time change, such as daylight saving time, that occurs in conjunction with any data (historical or future) must be properly configured for WFM to display time-series values correctly.

Note: The start date and stop date of Daylight Saving Time in the United States changed in 2007. See the U.S. Naval Observatory web site for the exact days.

To specify seasonal time change settings for a time zone:

1. Double-click the time zone in the WFM Configuration Utility Time Zones list.

   The Daylight Saving Time Information dialog box opens (This example uses the PST time zone).

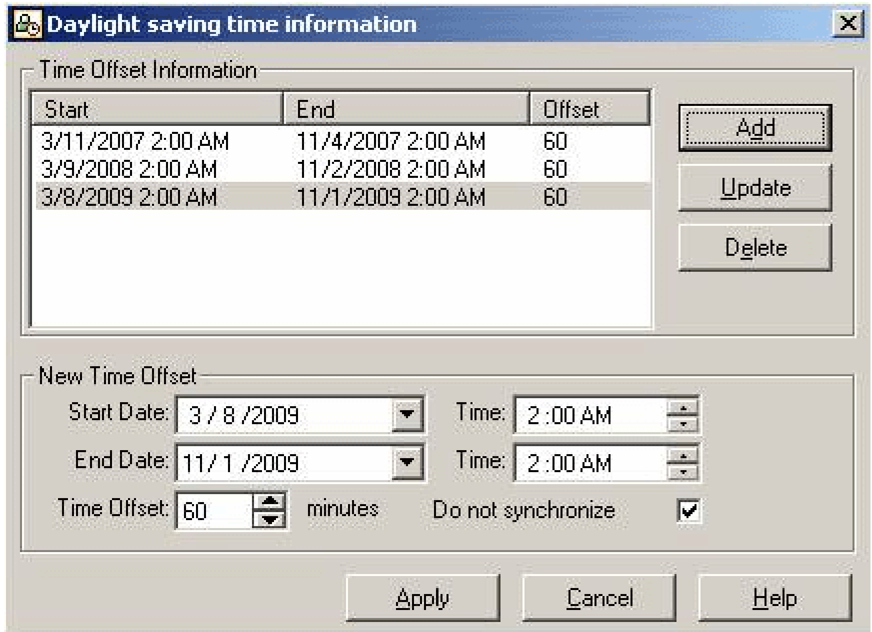


Figure 64: Daylight Saving Time Information dialog box

The Time Offset Information pane lists daylight saving information that has already been configured.

2. To edit an entry, click it. The New Time Offset area displays the settings.
3. When finished editing, click **Update.**
4. To remove an entry, select it and click **Delete.**

To create a new daylight saving setting:

1. Enter the start date and time and the end date and time for which the offset is to be effective.

Note: You cannot enter two different time offsets for the same period. If a site and a business unit share the same time zone, the settings for both are changed when you edit information for one.

In pre-7.0 versions of WFM, if you used time offsets, each new time-offset period had to start immediately after the previous one. Therefore, if you needed to configure a period during which there was effectively no time offset, you configured a time offset with a value of zero. This is no longer necessary or possible.

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2. Enter the number of minutes that the daylight saving time differs from the standard time or click the up or down arrow button until the correct number of minutes appears. The offset can be negative (the clock resets to an earlier time) or positive (the clock resets to a later time). The time offset cannot be zero (0).

For example, to make the change from U.S. daylight savings time to standard time (“fall back”), enter `60` as the time offset value. At the end of the time period you select, the offset is automatically reversed. In the example of U.S. daylight savings time, your system time will reset (“spring forward”) 60 minutes at the beginning of the next daylight savings time period.

Note: This offset must be a number divisible by 30.

3. Select **Do Not Synchronize** if you do *not* want the Configuration Manager settings to override the settings you configure in the Workforce Management Configuration Utility.
4. When you have entered the settings, click **Add** to move this new entry into the Time Offset Information pane.
5. When you are finished using this dialog box, click **Apply** to save your changes or **Cancel** to discard them.

Note: If you leave **Do Not Synchronize** unselected, choosing Synchronization from the Actions menu affects the *current year* settings. In the screen shot below, the settings changed from 2 a.m. GMT to the equivalent of that time in the PST Time zone (which is GMT-8).

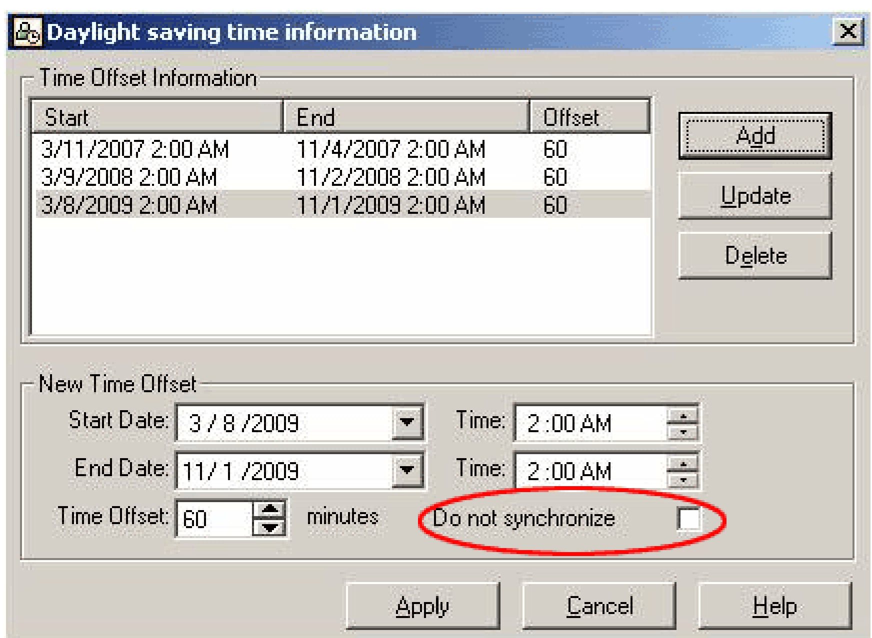

Figure 65: Do Not Synchronize Daylight Saving Time Information dialog box

Skills

Use the Configuration Skills module to view all skills configured in the Configuration Database and then choose which of them to use in Workforce Management by transferring them to the WFM Configuration Utility Skills list.

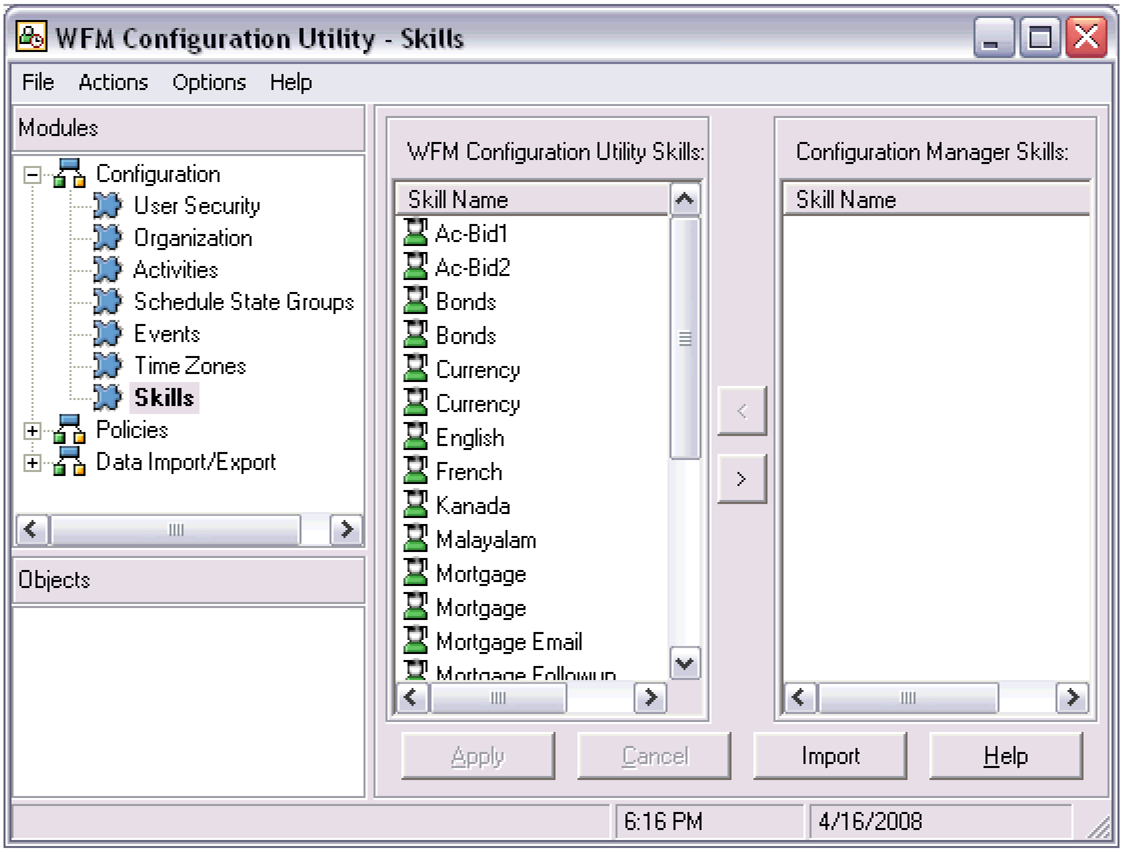

Figure 66: Configuration Utility Skills list

You cannot use skills that appear in the Configuration Manager Skills list to assign agents to activities. You can use only the skills that appear in the Configuration Utility skills list, and the display of skills in WFM is directly affected by your Configuration Manager tenant-based permissions. See the description of Configuration Manager Security for details.

To move all Configuration Manager skills into the WFM Configuration Utility Skills list:

1. Click **Import.**

   or
   Select a skill from the Configuration Manager Skills pane.
2. Click < to add it to the WFM Configuration Utility Skills pane.
3. Click **Apply.**

To remove skills from the WFM Configuration Utility Skills list:

1. Select a skill and click **>.**
2. Click **Apply.**

Warning! Your work may be undone. If you are running WFM Data Aggregator on the same database in which your Skills are stored, then Skills are synchronized automatically. That means that, after you remove Skills using WFM Configuration Utility, the Skills are re-inserted after a few seconds by WFM DA. (You must close leave the Skills dialog and return to observe this result; but you can consult the WFM DA log files to observe this “hidden” activity.)

Chapter

3 Policies

This chapter covers the following topics:

Overview

Policy objects are the rules that govern the work schedules of contact center agents.

These rules are defined as Configuration Utility objects for each site. Configuration Utility considers these policy objects when making forecasts and setting up schedules.

Configuration Utility includes the following policy objects:

- **Time-Off Rules**—Rules for the accumulation of accrued, and granting of awarded, time off.
- **Activity Policies**—Activity set configuration.
- **Contracts**—Categories of agents for purposes of scheduling and tracking. Contract configuration includes constraints for working hours and days, the availability, settings for mandatory days-off, overtime settings, profile configuration, required number of hours off between shifts, team start-time synchronicity, and schedule planning period duration.

- **Shifts—**Work shifts in the contact center. Shifts are defined by time of day and days of the week. You can refine your shift configuration using shift item sequences (breaks and meals) and task sequences.
- **Exception Types—**Defined periods of time when agents are engaged in noncontact work or are absent, such as during meetings or on days off.
- **Time Off Types—**Various types of time off, such as vacation, sick leave, holiday, and so on. This module enables you to configure various time-off types and associate them with time-off rules.
- **Meetings—**A period set aside for a specific activity, such as a meeting or training, attended by multiple agents.
- **Marked Time—**Periods that you can designate as requiring special tracking. For example, you might have an agent who works extra hours on a particular day but the extra hours do not count as overtime. You can mark those hours in order to track and report on them.
- **Rotating Patterns—**A *Rotating Pattern* is a sequence of weekly patterns that is assigned to staff. These weekly schedules can be built of days off, shifts, availability times, and fixed work hours.

Creating Policies Objects

To create a new Time-Off Rule, Activity Set, Contract, Shift, Exception, Meeting, Time-Off type, Marked-Time type, or Rotating Pattern:

1. Expand Policies on the Modules pane and click the appropriate object type.

   For activity sets, click Activity Policies.
2. On the Objects pane, right-click the site or business unit with which the new object is to be associated.

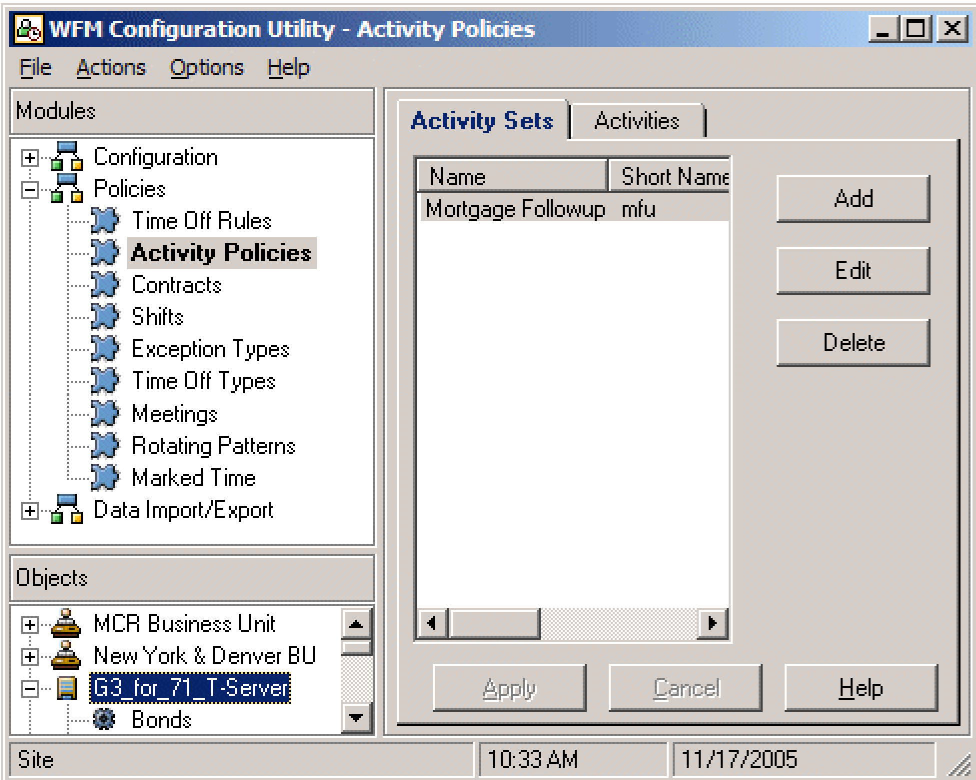

Figure 67: Activity Sets tab

3. Select **New <Object>** from the shortcut menu.
4. Configure the new object.
5. Click **Apply** before moving from one tab to the next if the configuration requires you to enter information into several windows, as happens when configuring a Contract or a Shift.

Note: You can return to a tab and change the information you previously entered at any time during configuration.

Time-Off Rules

Time-Off Rules Overview

Time-off rules control how time-off hours accumulate or are granted. You can configure multiple time-off rules for each time-off type. The Objects pane in the figure below shows an example rule `VacAccrual4x10 FT` (vacation accrual for full-time agents working four 10-hour days) for a time-off rule type called `Accrued Time Off Rule`.

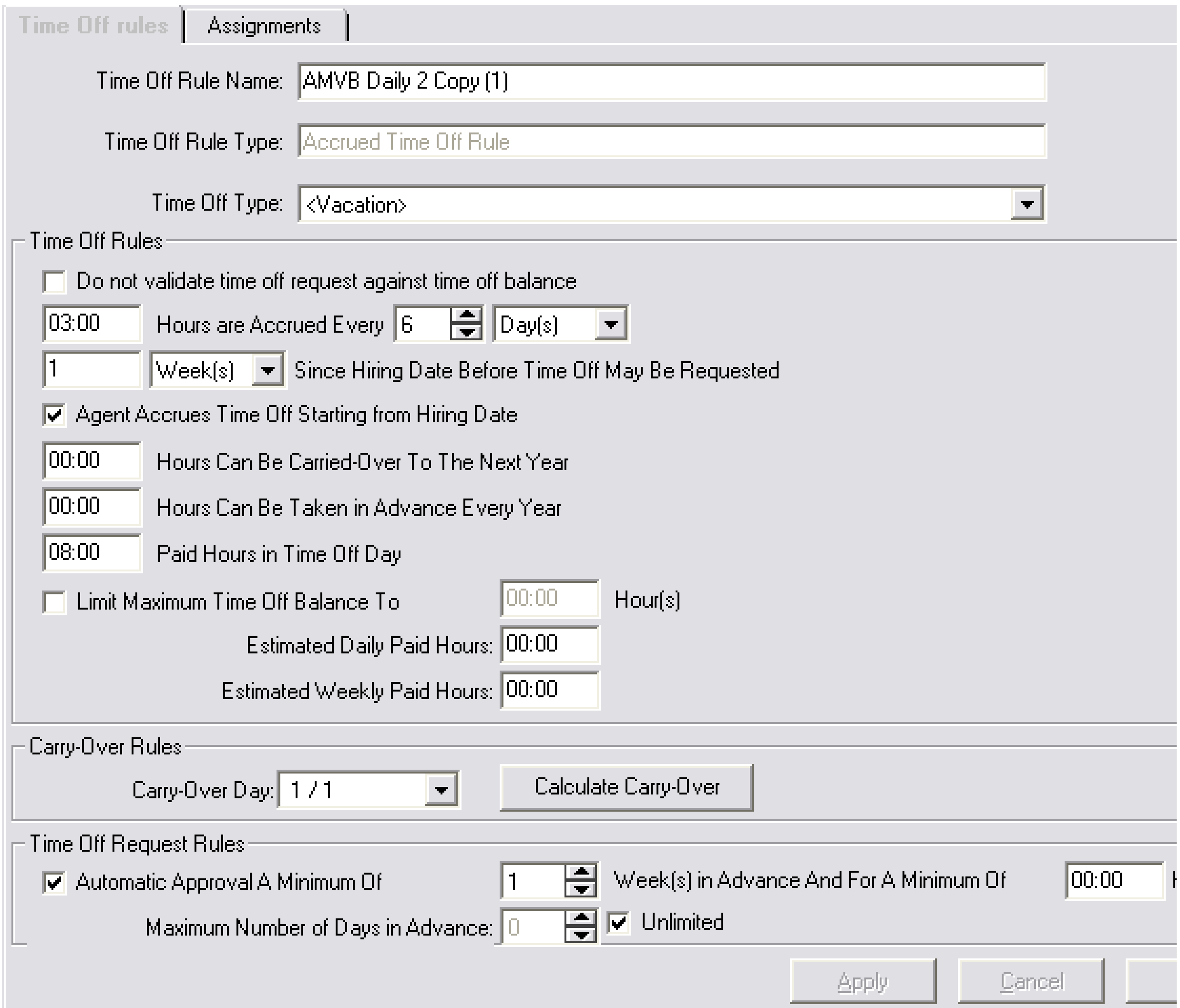

Figure 68: Time Off Rules tab

For example, you might set different accrual rates for paid time off depending on how long an agent has been employed.

Note: If you have not configured time-off types for the site before you can create a time-off rule, WFM assigns the new rule the default *Vacation* time off type.

The following points explain how time-off rules operate:

- Time off can be either accrued or awarded.

- If you change a time-off rule, the agent's carry-over time-off hours for that time-off type are calculated immediately, and the new rule applies from the time of the change. Time-off rules can change during configuration of the site, the agent, or the time-off rule.
- If agents with time-off rules for one or more types of time off are transferred to a different site during synchronization, the time-off rules remain associated with the agents, but they are no longer active. You must manually assign the agents time-off rules for the new site for them to continue to accumulate time off. When you calculate carry-over for such an agent, the time off is calculated at the old rate until the Stop Date and at the new rate from the Stop Date until the Carry-Over date.
    - If an agent becomes unassigned—that is, is no longer associated with a site—he or she keeps the assigned time-off rules. However, WFM sets the date at which the agent was removed from the site as the Stop Date and time off is accrued based on the rules from the former site only up to that date. To have the agent continue to accrue time off, you must assign the agent to a site and assign another time-off rule.

To calculate that agent's time-off balance for each time-off type based on the original time-off rules:

1. Select the agent.
2. Click **Carry Over** on the Time Off tab.

At this point, the time-off balances are calculated.

Use the Time-Off Rules module to:

- View and edit current time-off rules.
- Configure new and existing time-off rules.
- Assign time-off rules to agents.

The Time Off Rules tab has controls in several areas:

Time Off Rules, Carry-Over Rules, Time Off Request Rules

Time-Off Rules List

Select a site to see the list of time-off rules that are configured for that site.

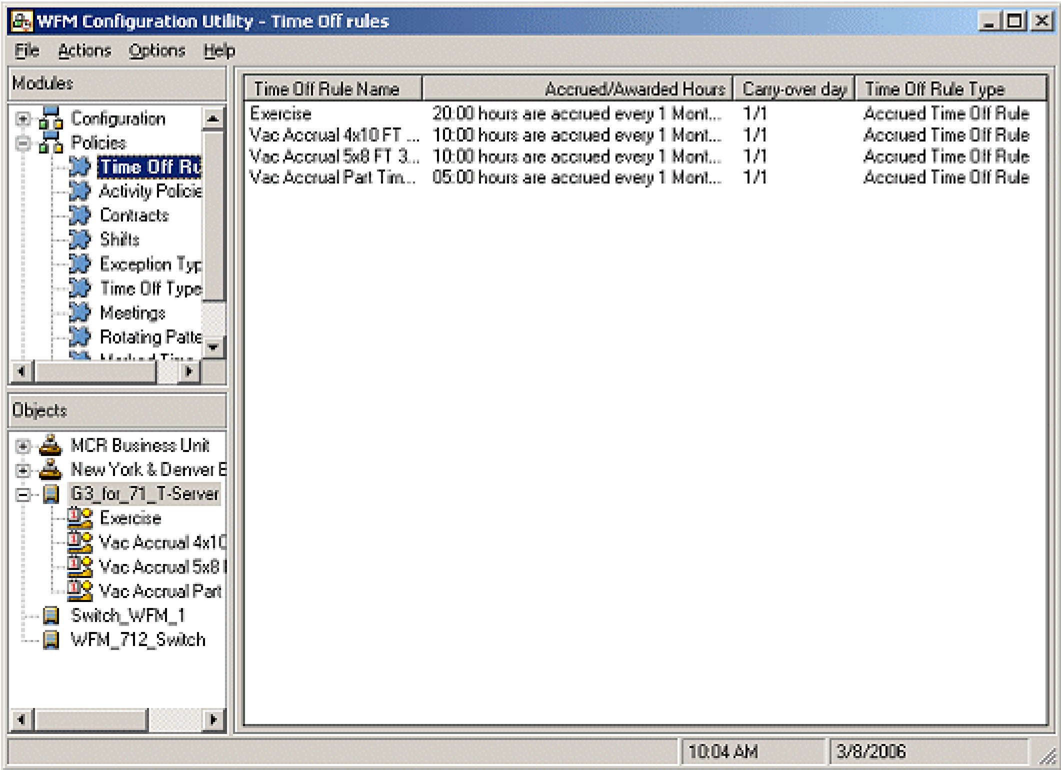

Figure 69: Time-Off Rules List

You cannot change the information on this pane directly. However, if you double-click a time-off rule, the Properties window for the time-off rule opens and you can edit the rule.

To add a time-off rule to a site, right-click the site or any time-off rule listed under the site on the Objects pane and then select **New Time Off Rule** from the shortcut menu.

Note: If you have not configured time-off types for the site before you can create a time-off rule, WFM assigns the new rule the default *Vacation* time off type.

Editing Time-Off Rules

To edit, copy, or delete a time-off rule:

1. Right-click the time-off rule on the Objects pane.
2. Select the appropriate command from the shortcut menu.

- If you select **Copy Time Off Rule,** right-click an existing time-off rule in the site to which you want to add the time-off rule and then select **Paste <*time off_rule_name*> Copy** from the shortcut menu.

- If you delete a time-off rule, any agents assigned to that time-off rule have their carried-over hours for the associated time-off type calculated immediately.
- WFM does not allow you to delete a time-off rule if:
  - assigned to any agent time-off.
  - used in agent time-off Calendar items.
- You may delete a time-off type if it is assigned to any agent time-off. WFM displays a warning message before the deletion operation.

For additional information:

- Configuring Time Off Rules, page 132 explains the time-off rule settings.
- Time-Off Rules: Assignments, page 140 explains how to assign time-off rules to agents.

New Time-Off Rule Attributes

To create a new time-off rule:

1. Select a site or an existing time-off rule under the appropriate site

2. Select **New Time Off Rule** from the shortcut menu.

3. Enter the settings in the New Time Off Rule Attributes dialog box.

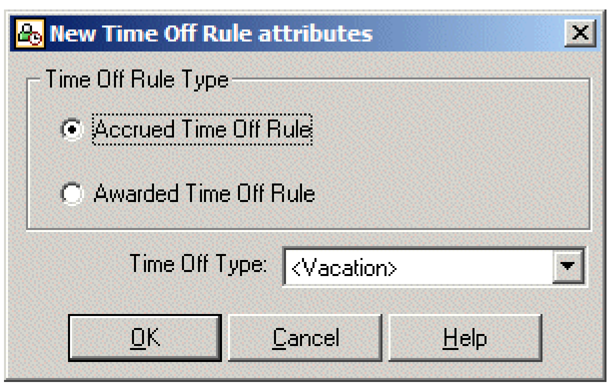

Figure 70: New Time Off Rule Attributes dialog box

The settings are explained below.

4. Click **OK.**

Configuring New Time-Off Rules

Accrued Time Off Rule—This can be accrued (a certain number of time off hours accumulate for each period worked). For example, paid time off is usually accrued, whereas holidays are awarded.

Awarded Time Off Rule—This can be awarded (time off is given as a set amount for the year).

Time Off Type—The type of time off to which this time-off rule applies. A single time-off type may have several rules. For example, you may have agents accumulate paid time off at different rates depending on seniority or responsibilities.

Configuring Time Off Rules

To configure a newly-created time-off rule or edit an existing one:

1. Enter the necessary information in the Time Off Rules tab.
2. For assistance, see the explanations of each field, below.
3. Click Apply to save your changes.
4. Click the Assignments tab to assign this time-off rule to agents. See Time-Off Rules: Assignments for information on using the Assignments tab.

Note: Editing time-off rules changes the way accrued hours are calculated by the WFM Calendar.

Therefore, WFM records the date you changed the rule (the Stop Date) and calculates the balance for all agents assigned this rule up to the Stop Date using the old time-off rule.

Hours accrued after the Stop Date are calculated using the new (edited) time-off rule. This ensures that changing the time-off rule does not increase or decrease the time-off balance for the dates before the change.

For example, if you change the time-off rule after an employee has worked for 5 years of service so that she accrues more hours for the same amount of time worked, this change applies only to dates after the date you changed the time-off rule.

You cannot adjust balances for time-off that accrued or was awarded before a balance calculation.

Note: When you change a Time Off Rule, or change the assignment of a Time Off Rule to an agent, there are 3 possible results:

---

1. The rule change is saved and your existing time off balance is recalculated.
2. The rule change is saved and your existing time off balance is not recalculated.
3. The rule change is abandoned; nothing at all changes.

Here is how you can reach each of these three possible results:

When you choose Save, a “Yes-No” message appears asking if you want the system to recalculate the time off balance:

`Do you want to calculate time off balance? (Yes/No)`

- Select Yes to start the existing time-off balance calculation process.

  A second question appears:

  `Time Off balances for the selected agents who have a time off rule assigned to them will be calculated using the old time off rule and the hours accrued up to <today's date> will be saved. After you change the time off rule, time off accrual will be calculated using the new rule. Do you want to proceed? (Yes/No)`

  - Select Yes to save the time off rule changes, AND to calculate time off by the old rule and future time off by the new rule. This result (#1) cannot be changed or undone.
  - Select No to perform no calculations, to change nothing and save nothing. (#3)
- Select No (to the previous question Do you want to calculate time off balance?) to not calculate the time-off balance. A second question appears:

  `The changes might affect Agent's time off balance. Are you sure you want to save the changes without calculating time-off balance? (Yes/No)`

  - Select Yes to save the time off rule changes and to save the time off balance with no calculations. This result (#2) cannot be changed or undone.
  - Select No to perform no calculations, to change nothing and save nothing. (#3)

Differences Between Accrued and Awarded Time Off

Accrued time off accumulates during the time-off period at the rate you specify during the time-off rule configuration. Agents receive their total of awarded time off for the entire time-off period in one disbursement at the beginning of the time-off period.

Not all time-off rule configuration parameters apply to both accrued and awarded time-off rules. For example, awarded time-off rules do not use the Agent Accrues Time Off from Hiring Date setting. Unused fields are disabled when you configure rules for awarded time off.

Time-Off Rules Tab

This tab has controls in several areas:

- “Time Off Rules Area” on page 134
- “Carry-Over Rules Area” on page 136
- “Time Off Request Rules Area” on page 136

Time-Off Rules Configuration

Time-Off Rule Name—You can accept the default name or enter a different name. The name must be unique within the site.

Time-Off Rule Type—Accrued (a certain number of time off hours accumulate for each period worked) or awarded (time off is given as a set amount for the year). For example, paid time off is usually accrued, whereas holidays are awarded. This is a read-only field. To change the rule type, you must delete the incorrect rule and create a new one.

Time Off Type—The type of time off to which this time-off rule applies. A single time-off type may have several rules. For example, you may have agents accumulate paid time off at different rates depending on seniority or responsibilities.

Time Off Rules Area

Do not validate time off request against time off balance—Select this check box to disable:

- All controls in the Time Off Rules area, except Paid Hours in Time Off Day label and its text box.
- All controls in the Carry-Over Rules area.

Default setting: cleared.

Note: Use this setting for special circumstances, such as sick days that are subject to time-off limits but do not count against an agent's time-off balance.

Hours are Accrued Every—The number of hours accrued every period. Enter number of hours in the first field in hh:mm format. Enter a number for how often the specified hours are accrued and then select the unit for the number (hours, days, weeks, months, or years) from the drop-down list.

Notes: Awarded time off must be entered as x hours per 1 Year. You cannot select any other period.

Synchronization can affect an agent's time-off accrual.

Time Since Hiring Date Before Time Off May Be Requested—The number of weeks or months the agent has to work after the hiring date before he or she can enter a time off request.

Agent Accrues Time Off Starting from Hiring Date—When selected, this check box specifies that the agent accrues time off from the date of hire. If disabled, time off is accrued beginning on the date when time off can be requested as set in the Time Since Hire Before Time Off Request Allowed field.

Hours can be Carried Over to the Next Year—The number of time off hours that can be carried over into the next yearly period. At carry-over, bonus and accrued time off hours are combined and the allowed number of hours is carried over to the next year. Hours above the allowed carry-over number are deleted. The default number of carried-over hours is 0.

Note: The current time-off period is determined either by the most recent carry-over date or, if no prior carry-over date exists, by the agent's date of hire. In cases where an agent has worked for several years with no carry-over calculation, time-off balances are calculated by taking into consideration each year the agent has worked. To apply bonus time-off hours to the current year, the agent must have had time-off carry-over calculated at the most recent carry-over date.

If you have already applied bonus hours and the carry-over date is not current, you can perform a carry-over calculation, at which time the bonus hours will be converted to carry-over hours. When performing this update, make sure that the number of carried-over hours allowed is large enough to accommodate all bonus hours to be carried over.

Hours That Can Be Taken in Advance—The number of time-off hours the agent can take in advance each year. These hours are offset by the hours accrued. This setting is disabled for awarded time-off rules.

Paid Hours in Full Time-Off Day—The number of paid hours in a full day time-off period.

Limit Maximum Time-Off Balance—If selected, enables you to set a limit to the total number of time-off hours an agent can accumulate.

Estimated Daily Paid Hours—This value is used only if you selected Hours or Days in the Hours are Accrued Every drop-down list. WFM Server uses this value when estimating an agent's time-off balance for dates when no schedule is available. Therefore, under normal circumstances, it should match the contract Standard Daily Paid Hours for agents who are assigned this time-off rule and have contracts associated with them. If an agent has no contract, you can enter any number of hours. This setting is disabled for awarded time-off rules.

Estimated Weekly Paid Hours—This value is used only if you selected Hours or Days in the Hours are Accrued Every drop-down list. WFM Server uses this value when estimating an agent's time-off balance for dates when no schedule is available. Therefore, under normal circumstances, it should match the contract Standard Weekly Paid Hours for agents who are assigned this time-off rule and have contracts associated with them.

If an agent has no contract, you can enter any number of hours. This setting is disabled for awarded time-off rules. You can configure this text box down to a one-minute time unit.

Carry-Over Rules Area

Carry-Over Day—The day that signifies the end of a period when carry-over days become applicable and a new time-off accrual period starts. It can be any day and month.

- The Carry-Over Day is applied to all agents who are assigned this time-off rule.
- Time-off days can be requested or granted only if they are after the last carry-over date.

Calculate Carry-Over Button—When clicked, this button calculates the carry-over balances for all agents of the contract and updates the database. When using Calculate Carry-Over, be aware that:

- The carry-over date must be in the past, prior to the current date.
- The last carry-over date for all agents is updated to the date you select in the Carry-Over Day field.
- Calculations of carry-over cannot be reversed.
- Carry-over calculations apply from the last carry-over date or the agent's date of hire, whichever is more recent.

Time Off Request Rules Area

Automatic Approval a Minimum of X Weeks in Advance—When selected, the Automatic approval field allows WFM to automatically grant or delete time off requested through WFM Web if:

- The request was made X weeks in advance.
- It is for Y number of hours.
- It complies with the time-off rules and limits.

(X and Y correspond to the values entered in these fields.)

Maximum Number of Days in Advance—Enter the maximum days in advance that an Agent may request time off. The default value 0 (zero) is also displayed when the control is disabled. To disable this function, select the Unlimited checkbox.

To configure a newly-created time-off rule or edit an existing one:

1. Enter the necessary information in the Time Off Rules tab.
2. For assistance, see the explanations of each field, below.
3. Click **Apply** to save your changes.
4. Click the Assignments tab to assign this time-off rule to agents. See Time-Off Rules: Assignments for information on using the Assignments tab.

- Editing time-off rules changes the way accrued hours are calculated by the WFM Calendar. Therefore, WFM records the date you changed the rule (the Stop Date) and calculates the balance for all agents assigned this rule up to the Stop Date using the *old* time-off rule.

  Hours accrued after the Stop Date are calculated using the *new* (edited) time-off rule. This ensures that changing the time-off rule does not increase or decrease the time-off balance for the dates before the change.

  For example, if you change the time-off rule after an employee has worked for 5 years of service so that she accrues more hours for the same amount of time worked, this change applies only to dates *after* the date you changed the time-off rule.
- You cannot adjust balances for time-off that accrued or was awarded before a balance calculation.

Consequences of Changing a Time Off Rule

When you change a Time Off Rule, or change the assignment of a Time Off Rule to an agent, there are 3 possible results:

1. The rule change is saved and your existing time off balance is recalculated.
2. The rule change is saved and your existing time off balance is not recalculated.
3. The rule change is abandoned; nothing at all changes.

Here is how you can reach each of these three possible results:

When you choose Save, a "Yes-No" message appears asking if you want the system to recalculate the time off balance:
Do you want to calculate time off balance? (Yes/No)

- Select **Yes** to start the existing time-off balance calculation process.
  A second question appears:
  `Time Off balances for the selected agents who have a time off rule assigned to them will be calculated using the old time off rule and the hours accrued up to <today's date> will be saved. After you change the time off rule, time off accrual will be calculated using the new rule. Do you want to proceed? (Yes/No)`
  - Select **Yes** to save the time off rule changes, AND to calculate time off by the old rule and future time off by the new rule. This result (**#1**) cannot be changed or undone.
  - Select **No** to perform no calculations, to change nothing and save nothing. (**#3**)
- Select **No** (to the previous question `Do you want to calculate time off balance?)` to *not* calculate the time-off balance. A second question appears:

```
The changes might affect Agent's time off balance. Are you sure you
want to save the changes without calculating time-off balance?
(Yes/No)
```

- Select **Yes** to save the time off rule changes and to save the time off balance with no calculations. This result (**#2**) cannot be changed or undone.
- Select **No** to perform no calculations, to change nothing and save nothing. (**#3**)

Differences Between Accrued and Awarded Time Off

Accrued time off accumulates during the time-off period at the rate you specify during the time-off rule configuration. Agents receive their total of awarded time off for the entire time-off period in one disbursement at the beginning of the time-off period.

Not all time-off rule configuration parameters apply to both accrued and awarded time-off rules. For example, awarded time-off rules do not use the Agent Accrues Time Off from Hiring Date setting. Unused fields are disabled when you configure rules for awarded time off.

Time-Off Rules Configuration

Time-Off Rule Name—You can accept the default name or enter a different name. The name must be unique within the site.

Time-Off Rule Type—Accrued (a certain number of time off hours accumulate for each period worked) or awarded (time off is given as a set amount for the year). For example, paid time off is usually accrued, whereas holidays are awarded. This is a read-only field. To change the rule type, you must delete the incorrect rule and create a new one.

Time Off Type—The type of time off to which this time-off rule applies. A single time-off type may have several rules. For example, you may have agents accumulate paid time off at different rates depending on seniority or responsibilities.

Hours are Accrued Every—The number of hours accrued every period. Enter number of hours in the first field in hh:mm format. Enter a number for how often the specified hours are accrued and then select the unit for the number (hours, days, weeks, months, or years) from the drop-down list.

Notes: Awarded time off must be entered as *x* hours per *1 Year.* You cannot select any other period.

Synchronization can affect an agent's time-off accrual.

Time Since Hiring Date Before Time Off May Be Requested—The number of weeks or months the agent has to work after the hiring date before he or she can enter a time off request.

Agent Accrues Time Off Starting from Hiring Date—When selected, this check box specifies that the agent accrues time off from the date of hire. If disabled, time off is accrued beginning on the date when time off can be requested as set in the Time Since Hire Before Time Off Request Allowed field.

Hours can be Carried Over to the Next Year—The number of time off hours that can be carried over into the next yearly period. At carry-over, bonus and accrued time off hours are combined and the allowed number of hours is carried over to the next year. Hours above the allowed carry-over number are deleted. The default number of carried-over hours is 0.

Note: The current time-off period is determined either by the most recent carry-over date or, if no prior carry-over date exists, by the agent's date of hire. In cases where an agent has worked for several years with no carry-over calculation, time-off balances are calculated by taking into consideration each year the agent has worked. To apply bonus time-off hours to the current year, the agent must have had time-off carry-over calculated at the most recent carry-over date.

If you have already applied bonus hours and the carry-over date is not current, you can perform a carry-over calculation, at which time the bonus hours will be converted to carry-over hours. When performing this update, make sure that the number of carried-over hours allowed is large enough to accommodate all bonus hours to be carried over.

Hours That Can Be Taken in Advance—The number of time-off hours the agent can take in advance each year. These hours are offset by the hours accrued. This setting is disabled for awarded time-off rules.

Paid Hours in Full Time-Off Day—The number of paid hours in a full day time-off period.

Limit Maximum Time-Off Balance—If selected, enables you to set a limit to the total number of time-off hours an agent can accumulate.

Estimated Daily Paid Hours—This value is used only if you selected Hours or Days in the Hours are Accrued Every drop-down list. It normally matches the contract Standard Daily Paid Hours for agents who are assigned this time-off rule and have contracts associated with them. If an agent has no contract, you can enter any number of hours. This setting is disabled for awarded time-off rules.

Estimated Weekly Paid Hours—This value is used only if you selected Hours or Days in the Hours are Accrued Every drop-down list. It normally matches the contract Standard Weekly Paid Hours for agents who are assigned this time-off rule and have contracts associated with them. If an agent has no contract, you can enter any number of hours. This setting is disabled for awarded time-off rules. You can configure this field down to a one-minute time unit.

Carry-Over Day—The day that signifies the end of a period when carry-over days become applicable and a new time-off accrual period starts. It can be any day and month.

- The Carry-Over Day is applied to all agents who are assigned this time-off rule.
- Time-off days can be requested or granted only if they are after the last carry-over date.

Calculate Carry-Over Button—When clicked, this button calculates the carry-over balances for all agents of the contract and updates the database. When using Calculate Carry-Over, be aware that:

- The carry-over date must be in the past, prior to the current date.
- The last carry-over date for all agents is updated to the date you select in the Carry-Over Day field.
- Calculations of carry-over cannot be reversed.
- Carry-over calculations apply from the last carry-over date or the agent's date of hire, whichever is more recent.

Automatic Approval a Minimum of X Weeks in Advance—When selected, the Automatic approval field allows WFM to automatically grant or delete time off requested through WFM Web if:

- The request was made X weeks in advance.
- It is for Y number of hours.
- It complies with the time-off rules and limits.

(X and Y correspond to the values entered in these fields.)

Maximum Number of Days in Advance—Enter the maximum days in advance that an Agent may request time off. The default value 0 (zero) is also displayed when the control is disabled. To disable this function, select the Unlimited checkbox.

Time-Off Rules: Assignments

This tab has two panes, Selected Agents and Available Agents.

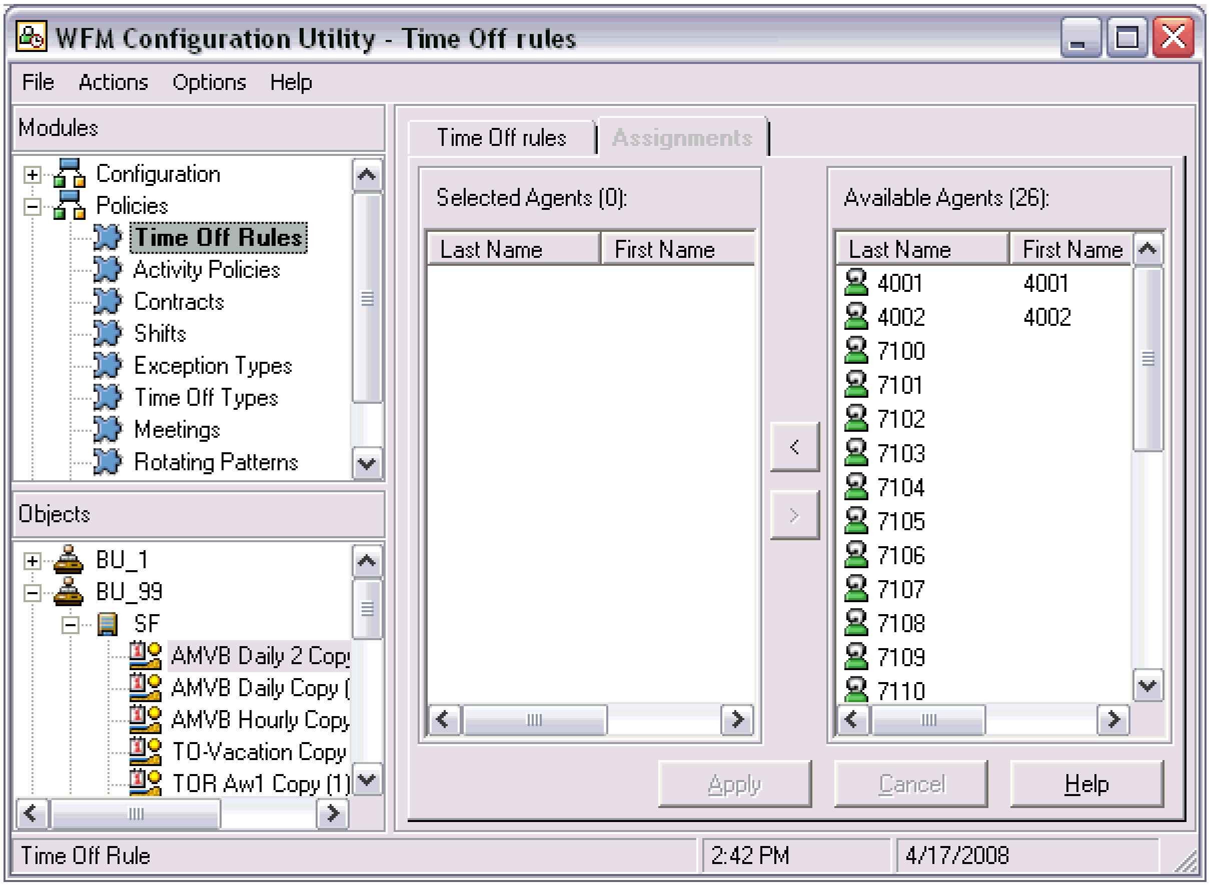

Figure 71: Time off Rules, Assignments tab

- Selected Agents belong to the selected site and are assigned this time-off rule.
- Available Agents belong to the selected site.

To move agents from one pane to the other:

1. Select the agent or agents. You can select multiple agents using Windows-standard [Ctrl] and [Shift] selection functionality.
2. Click the arrow button that points toward the pane to which you want to move the agent.
3. Click **Apply** to save your changes or **Cancel** to discard them.

See Consequences of Changing a Time Off Rule, page 137.

Activity Policies

Overview

Use the Activity Policies module to create and configure activity sets.

Use this module to:

- View, add, edit, or delete activity sets.
- Configure new or existing activity sets.
- View available activities.
- Set staffing and open hours rules for activities.
- Set open hours rules for Multi-Site Activities.

Activity Sets

Use activity sets to combine activities into groups for multi-skilled scheduling.

Note: You must have created activities before you can configure activity sets.

When using activity sets, be aware of the following:

- Activity sets are separately configured for each site. You cannot configure activity sets for business units.
- An activity in an activity set can be incorporated in a multiskilled schedule only with other activities from the same set.
- An activity cannot belong to more than one activity set.
- An activity belonging to an activity set can only be scheduled using the activity set.
- To configure an activity so that it will never be incorporated in a multiskilled schedule, create an activity set containing only that one activity.
- The activity set constraint is incompatible with the maximum seats constraint. In cases of conflict, Scheduler gives priority to the activity set constraint.

Agents assigned to an activity set perform the selected activities on a multiskilled basis. These agents cannot be assigned to any other activities during the minimum time period specified for the activity set.

Note: To accommodate those times when some agents cannot be assigned to work on an activity set, Genesys recommends that you always keep an activity that is not a part of an activity set available for agents to perform during the activity set open hours. If the activity set becomes overstaffed before all agents are scheduled, Scheduler tries to create activity set work for them. However, if an agent's unassigned period is shorter than the minimum activity set period, Scheduler has to assign the agent an extended period with no activities at all (forced break) because no activity is available for him or her to work on.

Add or Edit an Activity Set

To add or edit an activity set:

1. Click the **Policies Activity Policies** module and then select a site from the Objects pane. The Data pane displays Activity Sets and Activities tabs.
2. Click **Add** or select an existing activity set and then click **Edit.**
   - If you click Add, the Activity Set dialog box opens.

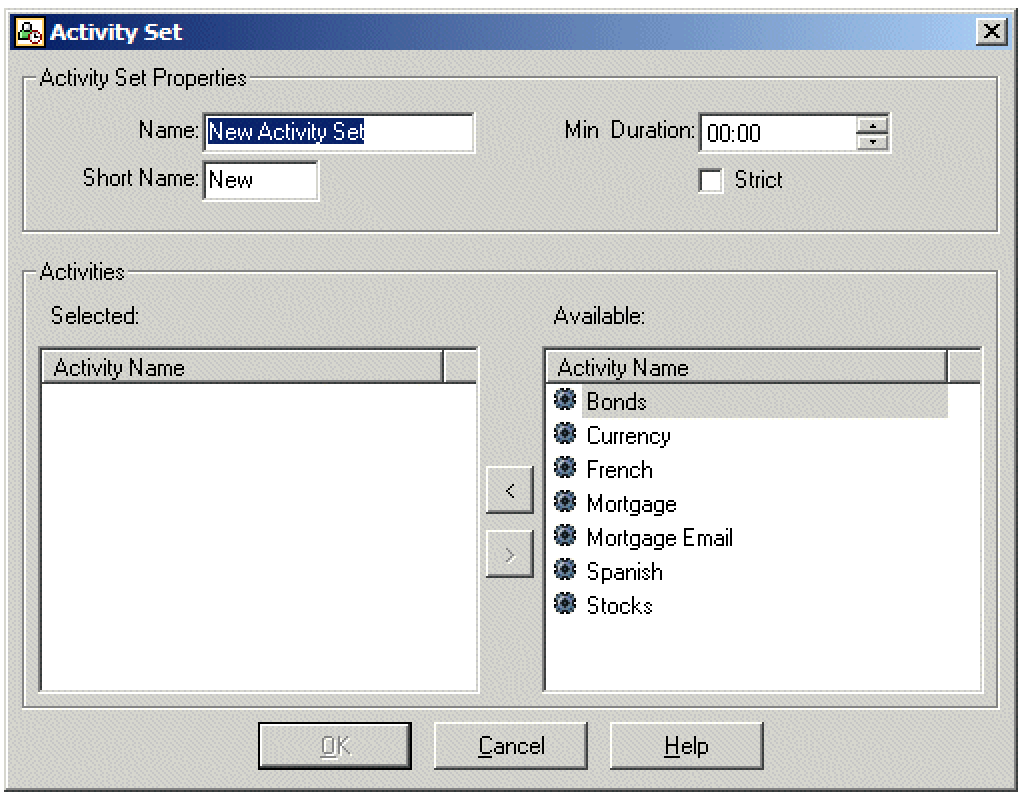

Figure 72: Creating a New Activity Set

- If you select an Activity Set and click Edit, the Activity Set dialog box opens. The selected activity is highlighted under Activity Name.

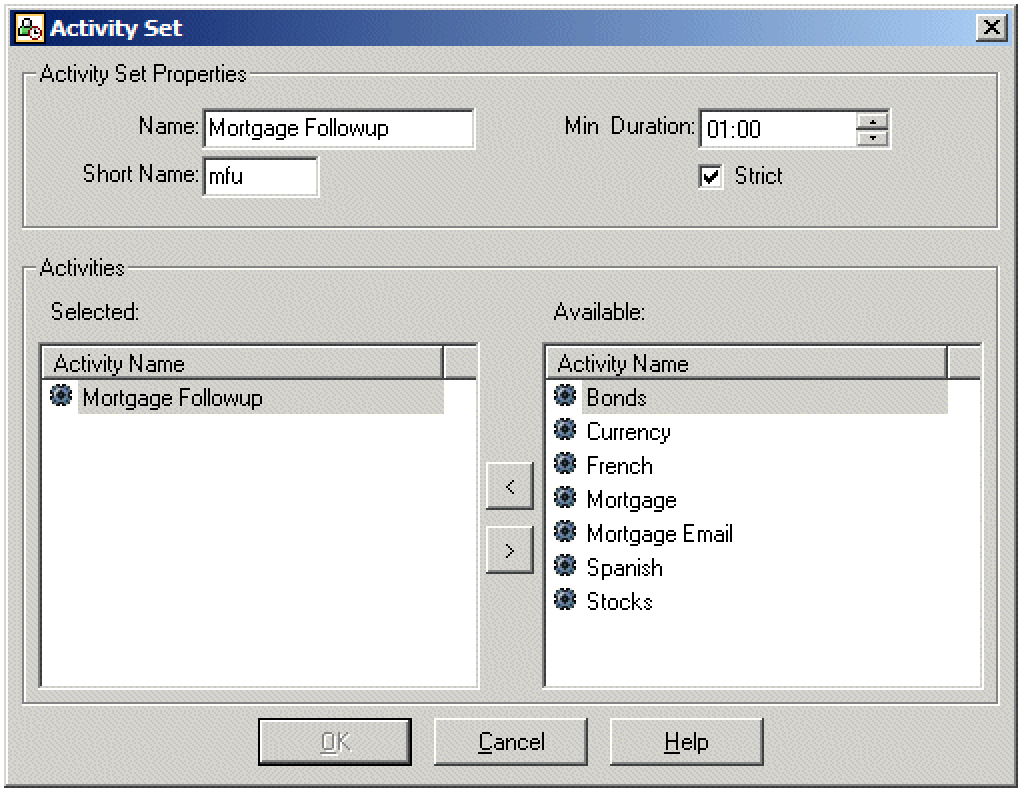

Figure 73: Editing an Existing Activity Set

3. Configure the activity set properties as described in Add or Edit an Activity Set.
4. Click **Apply** to save your changes or **Cancel** to restore the original settings.

Activity Set List Properties

Name—The name for the activity set. The set name must be unique within the site and should identify the nature of the set as clearly as possible.

Short Name—An abbreviated name of up to three characters. Configuration Utility uses the short name in displays.

Min. Duration—The minimum consecutive period during which an agent can only work on activities from the activity set. Enter this duration in the format hours:minutes.

Activities—The activities that are included in the activity set.

Deleting an Activity Set

Note: You cannot delete an activity set that is used in a task sequence.

- To delete an activity set, select the set from the Activity Set list and click **Delete.**

Warning! Clicking **Delete** causes the selected activity set to disappear immediately. There is no confirmation dialog box.

- To restore a deleted activity set, click **Cancel.**
- To confirm the deletion and save your changes in the window, click **Apply.**

Add or Edit an Activity Set

To add or edit an activity set:

1. Enter a name and a short name for the activity set. They must be unique within the site.
2. Set the minimum duration, which is the minimum consecutive period during which an agent can only work on activities from the activity set. Enter this duration in the format hours:minutes.
3. To make an activity set Strict, select the Strict check box. The default value is Non-Strict.

   Strict—Indicates to Scheduler that no meals, part-day exceptions, or part-day time offs can be scheduled during the activity set period. However, breaks may be scheduled during the activity set.

   Non-Strict—The only constraint is the minimum duration. Breaks, meals, part-day exceptions, and part-day time offs can interrupt the non-strict activity set.
4. Move activities you want to include into the Selected pane by clicking the < button.
   - To include all activities from the Available pane into the Selected pane, click the << button**.**
   - To remove activities use the > or >> buttons to move activities from the Selected pane to the Available pane.
5. Click **OK.**

The Activity Set list reappears, displaying the new activity set settings.

Activities List

Use the Activities tab to see a list of all activities that are configured for the site you selected on the Objects pane.

1. Select **Policies** > **Activity Policies.**
2. Select a Site.
3. Select the Activities tab.

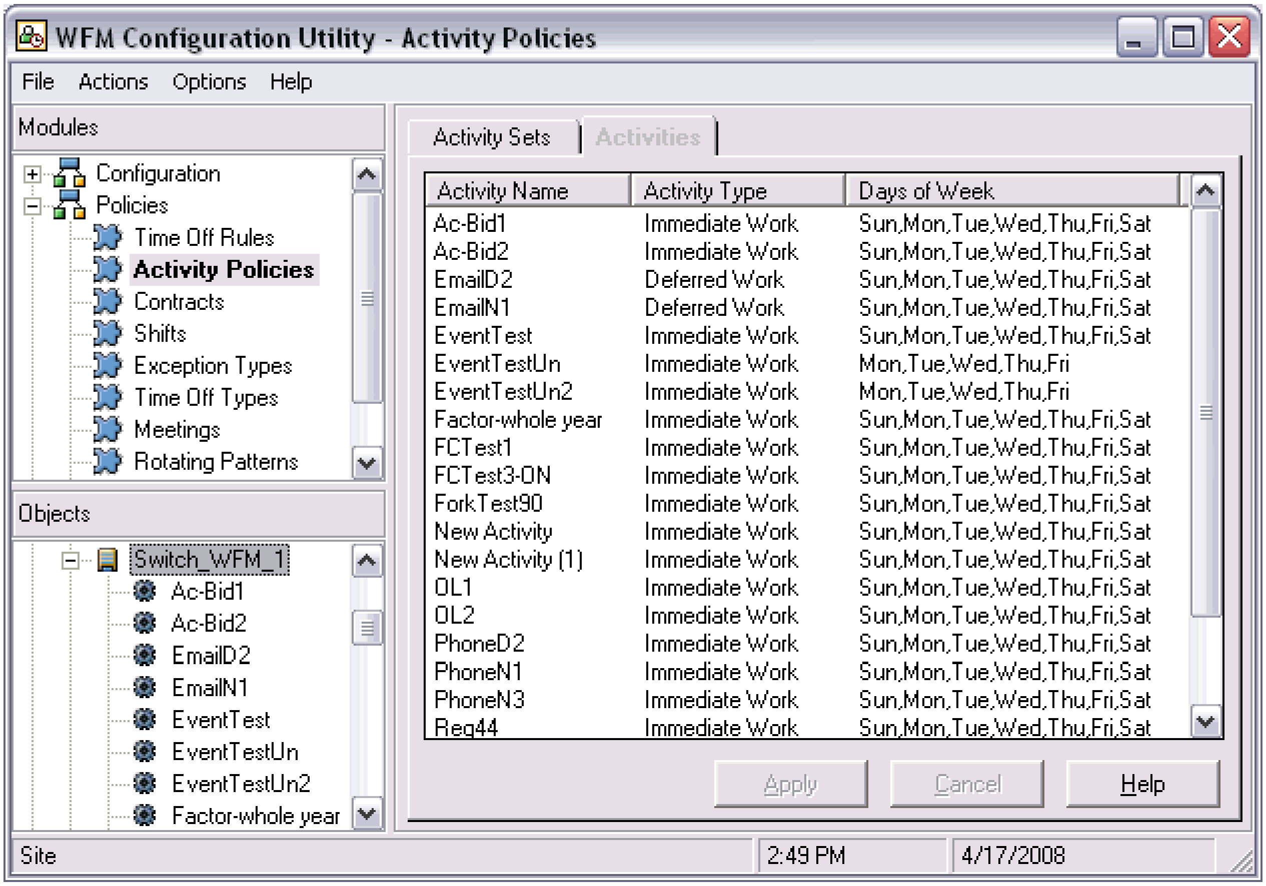

Figure 74: Activities List

Note: This list is view-only. To edit an activity, select it on the Objects pane. See Activity Staffing and Open Hours Rules for instructions. For additional activity configuration options, use the Configuration > Activities module.

Activity Staffing and Open Hours Rules

To configure activity staffing properties and hours of operation:

1. Click the Activity Policies module.
2. Expand a site from the Objects pane.
3. Select an activity.

The Data pane adds Properties and Hours of Operation fields. The figure below shows the pane filled in with sample data.

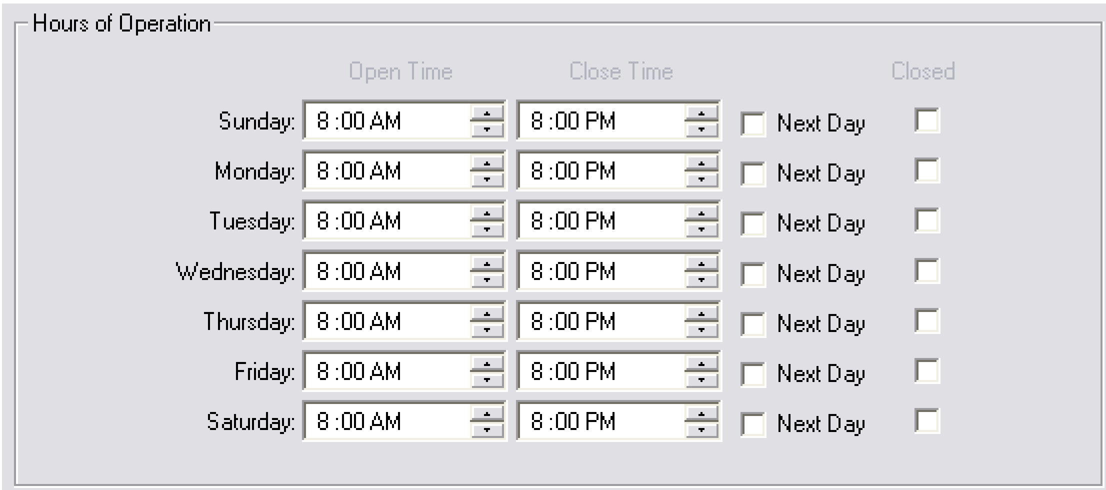

Figure 75: Data pane, Hours of Operation fields

4. Enter values into the text boxes based on the explanations below.
5. Click **OK.**

Maximum Simultaneous Users for This Activity—The maximum *number* of agents who can be scheduled to perform this activity at one time.

- Use this parameter in multiskilled environments. Leave the value as 0 in single-skilled environments.

Minimum Staffing Level for This Activity—The minimum *percentage* of scheduled agents or the minimum *number* of agents required to perform this activity at any given time.

Select **Percent** or **Agents** to indicate whether the above value represents a percentage or the number of agents. Percent is selected by default.

- If Agents is selected, valid values for Minimum Staffing Level for This Activity is from 0 to 10,000.
- If Percent is selected, valid values are from 0 to 100.

Hours of Operation—The interval, on each day of the week, during which this activity can be performed. You can enter Start and End times in 15–minute granularity.

- If an activity cannot be performed at a particular time (for example, if the site is closed on weekends), select the Closed check box for that day.
- Setting both the Start and End times to midnight and selecting the Next Day check box makes an activity open 24 hours on the specified day.
- If the activity's open hours cross midnight, select the Next Day check box.

Contracts

Overview

Contracts settings are closely related to employment contracts.

Use contracts to configure settings for agent availability times, days off, and overtime that might be union or contractual requirements. In this way, WFM automatically takes these settings into consideration during scheduling, producing legal schedules for every agent.

Contract configuration includes: constraints on paid hours and days, the default availability pattern, days-off settings, overtime settings, assignment of agents to the contract, and profile configuration.

You also use the Contracts module to configure the Minimum Duration Between the End of the Day and Start of Next Working Day, Maximum Start Time Difference for Members of the Same Team, and the Schedule Planning Period Type settings. See the Contracts General Tab for details.

Creating a Contract

You can create an entirely new contract or create a new one by copying an pasting an existing contract.

To create a new contract:

1. Expand Policies on the Modules pane and click **Contracts.**
2. Select and then right-click either a site or an existing contract on the Objects pane.
3. Select **New Contract** from the shortcut menu.

To copy and paste an existing contract:

1. Select a contract.
2. Right-click it and then select **Copy Contract.**
3. Right-click a site or any existing contract within that site and then select **Paste <*contract_name*> Copy.**

   Whichever method you use, the new contract appears on the Objects pane with the default name *New Contract*.

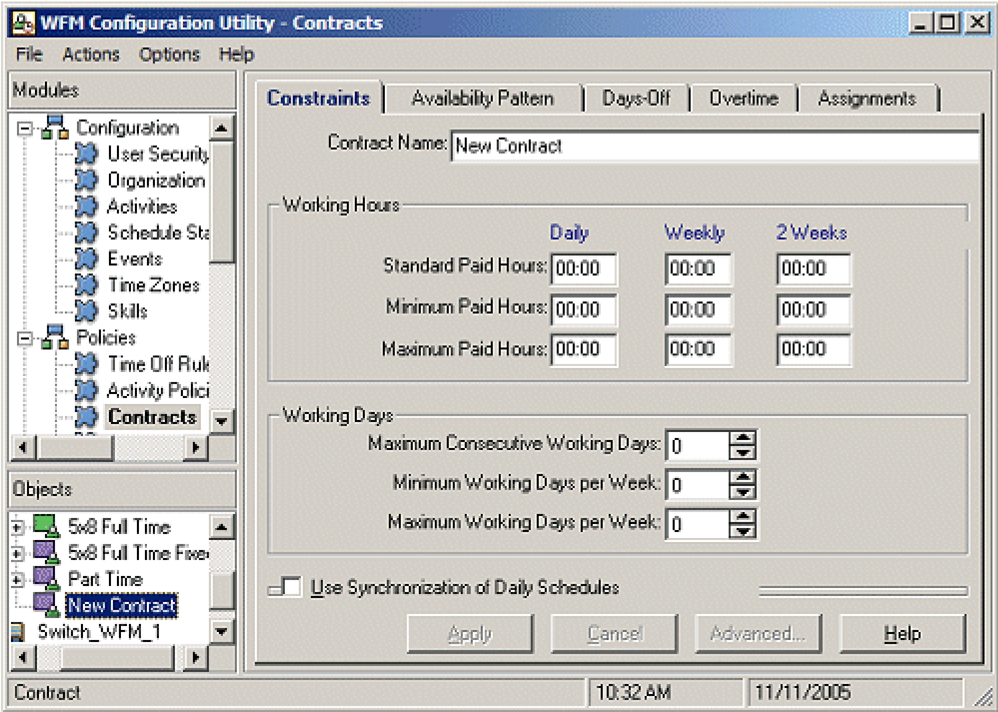

Figure 76: New Contract, Constraints tab

4. Configure the contract. For information on each tab, see Contract Constraints, Contract Daily Availabilities, Contract Days Off, Contract Overtime, and Assigning Agents to a Contract.

Creating a Profile

See Configuring Profiles for how to create and configure profiles.

Deleting Contracts

To delete a contract:

1. Right-click the contract on the Objects pane.
2. Select **Delete** from the shortcut menu.

Contracts General Tab

To bring up the Contracts General tab:

1. Expand Policies on the Modules pane and click **Contracts.**
2. Select an existing site on the Objects pane.

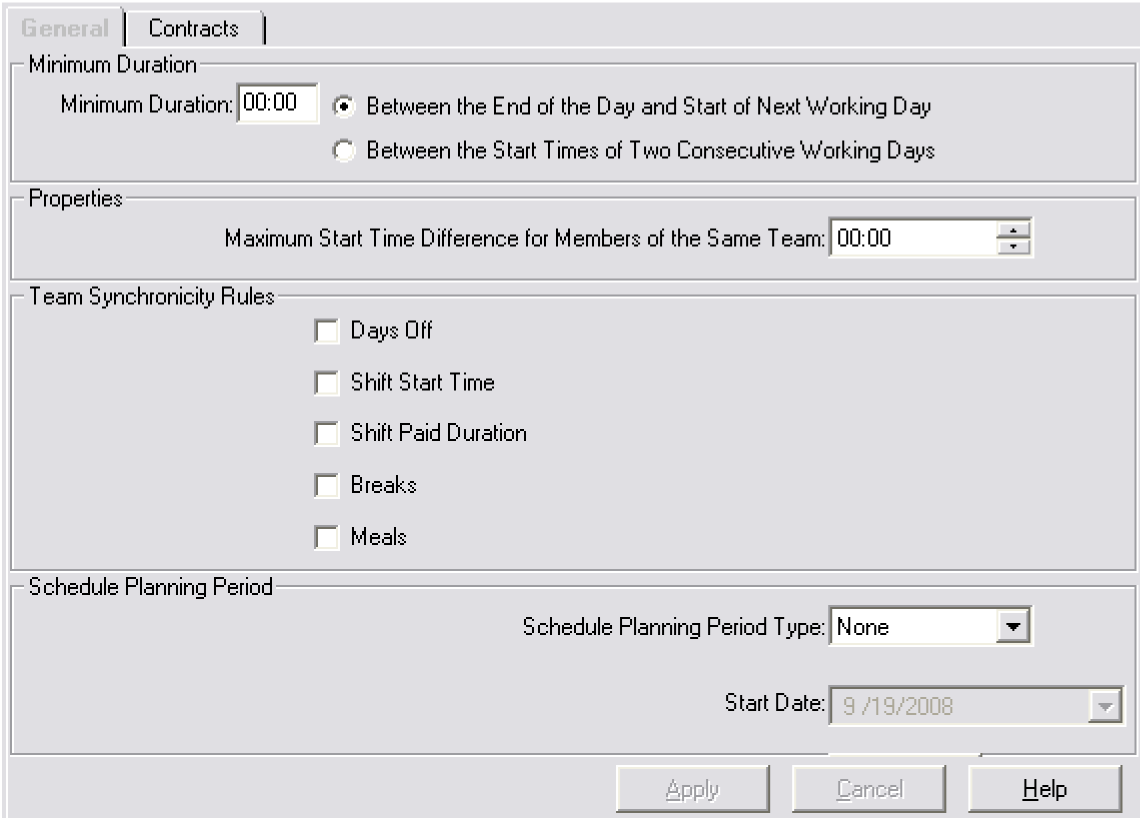

Figure 77: Contracts General tab

To configure site rules using the Contracts General tab:

1. Enter settings for the selected site, as explained below.

Site Rules Properties

Minimum Duration area

Minimum Duration (entry box)—Enter a length of time in the hh:mm format. This number applies to the two radio buttons directly beneath it:

- **Between the End of the Day and Start of Next Working Day** (radio button)—The minimum amount of time that must pass between the end of each agent's working day and the beginning of the next.
- **Between the Start Times of Two Consecutive Working Days** (radio button)—The minimum amount of time that must pass between the start of each agent's working day and the beginning of the next.

Properties area

Maximum Start Time Difference for Members of the Same Team—How far apart team members can begin their shifts (team synchronicity constraint).

Note: To use this feature, you must enable the Team Constraints option during schedule building in the WFM Web application.

Team Synchronicity Rules Area

Select one or more check boxes, to specify which properties WFM Builder will attempt to synchronize for team members when creating their schedules.

- Days Off
- Shift Start Time
- Shift Paid Duration
- Breaks
- Meals

Note: You cannot select combinations that are invalid.

Schedule Planning Period area

Schedule Planning Period Type—Allows you to define a period of longer than a week that can be used to set up Contract constraints, such as number of paid hours and number of days off. The Schedule Planning Period options are: None, Monthly, Two Weeks, Three Weeks, Four Weeks, Five Weeks, and Six Weeks.

To define a Schedule Planning Period:

1. Select an option from the *Schedule Planning Period* drop-down list.
2. If you selected a number of weeks, also select a **Start date** in the next field.

   The start date must correspond to the Week Start Day value configured on the Workforce Manager Application Options tab or, if no WeekStartDay is configured, the first day of the week in your local system settings. Future iterations of the Schedule Planning Period will start on the same day of the week. If you selected the Monthly option, this field will be unavailable, and future iterations of the Schedule Planning Period will start on the first day of each calendar month. See the topic Global Settings for more on the WeekStartDay.
3. Click **Apply.**

- If a Schedule Planning Period was already defined:, click **Reset** to change it.
  If you click **Reset,** all previously entered Schedule Planning Period settings in the Contract Constraints and Time-Off tabs are deleted, and you must reenter them for *all* Contracts in the affected site.

Contracts List

Use the Contracts tab to see a list of all contracts that are configured for the site you selected on the Objects pane.

1. Select **Policies** > **Contracts.**
2. Select the site.
3. Select the Contracts tab.

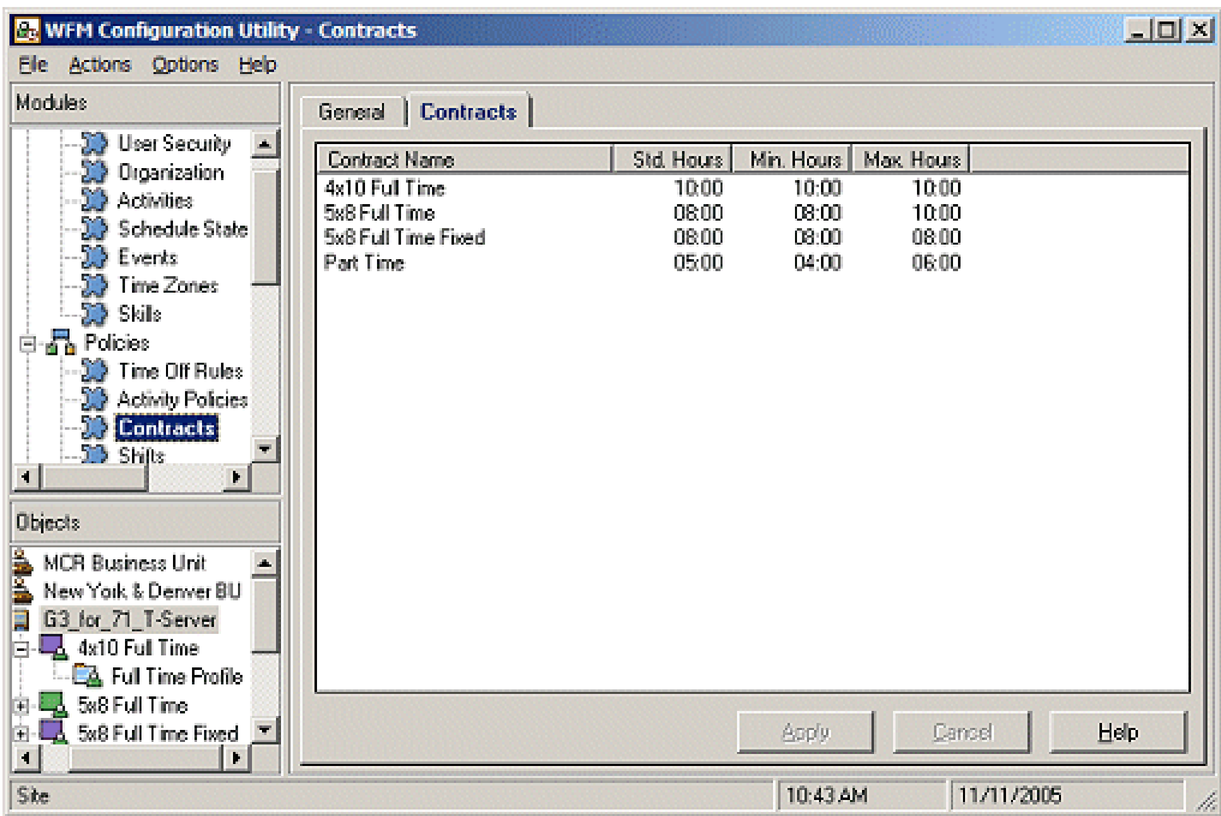

Figure 78: Contracts tab

Note: This list is view-only. To edit a contract, select it on the Objects pane. See Contracts Overview for further instructions.

Contract Constraints

The Constraints tab defines the basic scheduling parameters for each contract.

Use the Contract Constraints tab when you create a new contract or when you edit an existing contract. To bring up the Constraints tab for an existing contract:

1. Expand Policies on the Modules pane and click **Contracts.**
2. Select an existing contract on the Objects pane.

The figure below, under Working Hours, shows the Constraints tab when the Schedule Planning Period is a month.

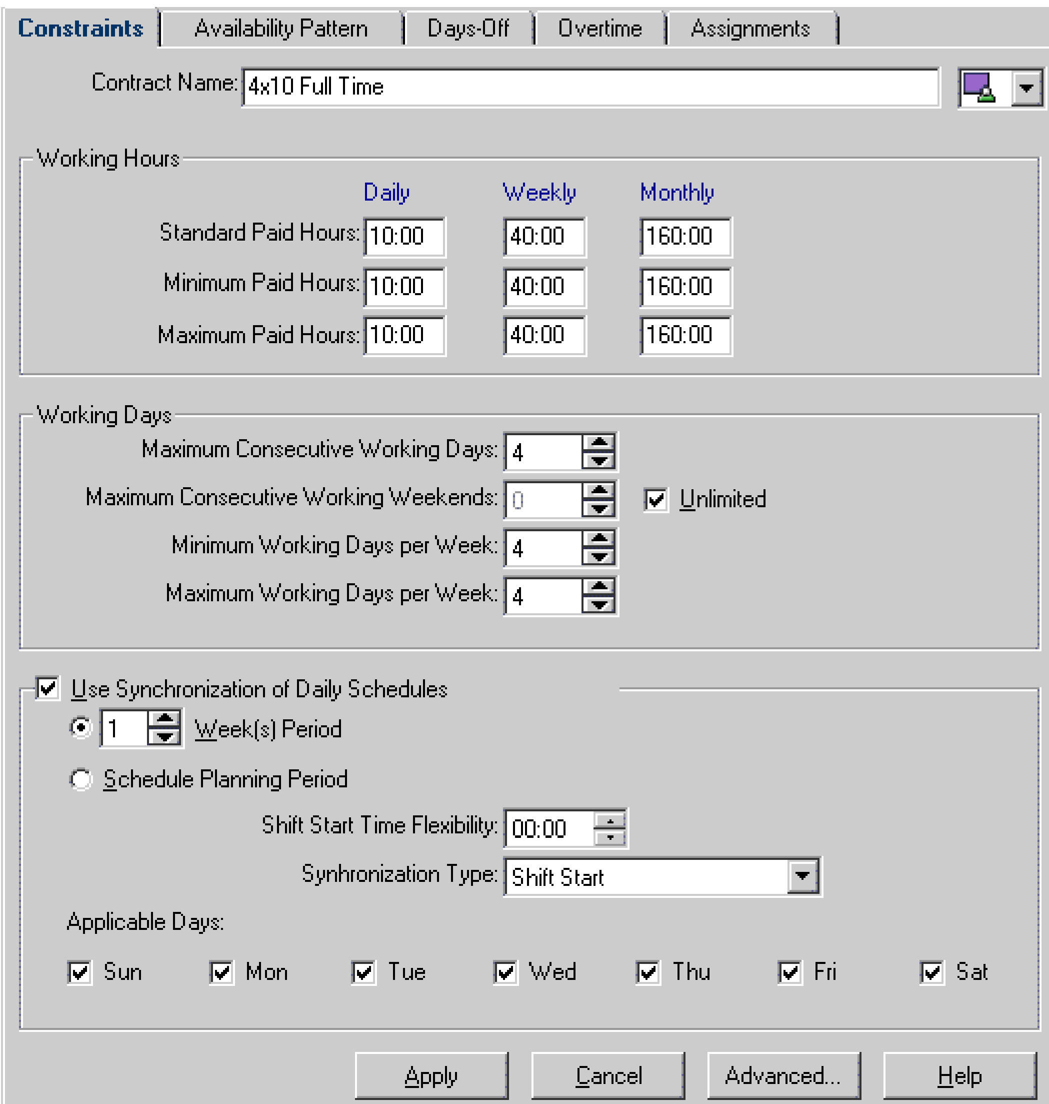

Figure 79: Constraints tab

Among other properties, you can set synchronization, which ensures that an agent starts each workday within a user-defined time threshold.

Note: You cannot create optimal schedules if you have not configured the constraints properly. Workforce Manager runs a consistency check to ensure that the minimum and maximum days off per week are compatible with the minimum and maximum days off per schedule planning period.

- If you receive an error message when you are configuring Contract constraints, review the rules for each constraint (given in the Paid Hours and Working Days table below).

Contract Constraints Properties

Contract Name—The name of the Contract. Use names, such as *Full-time*, *Temp*, or *Intern*, that identify the agent type. The name must be unique within the site.

Icon—The icon you want displayed for this contract. Choose a background color that will make identification easy.

Paid Hours and Working Days Settings

Standard Paid Hours—The paid time, in hours and minutes, that agents assigned to this contract work in a standard day, week, and (if applicable) schedule planning period.

Daily Valid Values: up to 24 hours

Weekly Valid Values: up to 168 hours; can configure with a 1-minute time unit

Schedule Planning Period Valid Values: up to 1008 hours (or fewer, depends on the planning period length) can configure with a 1-minute time unit

Rules

- Should exclude overtime.
- Values must be >= (greater than or equal to) the Minimum Paid Hours for the same period.
- Values must be <= (less than or equal to) the Maximum Paid Hours for the same period.
- Weekly and schedule planning period values must be divisible by 15 minutes.
- If you are using a schedule planning period, the weekly value multiplied by the number of weeks in the schedule planning period must be >= the schedule planning period value.

Minimum Paid Hours—The minimum paid time, in hours and minutes, that agents assigned to this contract are required to work per day, week, and (if applicable) schedule planning period according to contractual requirements.

Daily Valid Values: up to 24 hours

Weekly Valid Values: up to 168 hours; can configure with a 1-minute time unit

Schedule Planning Period Valid Values: up to 1008 hours (or fewer, depends on the planning period length) can configure with a 1-minute time unit

Rules

- This value must be more than 0.
- This value must be less than or equal to the Standard Paid Hours value for the same period.
- The daily value x Minimum Paid Days per Week must <= the weekly value.
- The daily value x Minimum Paid Days per Week must <= the Maximum Working Days per Week.
- Weekly and schedule planning period values must be divisible by 15 minutes.
- If you are using a schedule planning period, the weekly value x the number of weeks in the schedule period must =< the schedule planning period value.
- The weekly value divided by the Maximum Daily Paid Hours value must <= the Minimum Working Days per Week.
- If you set the Weekly Minimum Paid Hours and the Minimum Working Days per Week values to 0, Scheduler has the option of assigning an agent a week off if there is insufficient work.

Maximum Paid Hours—The maximum paid time, in hours and minutes, that agents assigned to this contract are required to work per day, week, and (if applicable) schedule planning period according to contractual requirements.

Daily Valid Values: up to 36 hours

Weekly Valid Values: up to 180 hours; can configure with a 1-minute time unit

Schedule Planning Period Valid Values: up to 1020 hours (or fewer, depends on the planning period length) can configure with a 1-minute time unit

Rules

- Includes all overtime and paid exceptions.
- Must be >= the Standard Paid Hours value for the same period.
- The daily value x Minimum Working Days per Week must => the Weekly Minimum Paid Hours value.

- If you are using a schedule planning period, the weekly value x the number of weeks in the schedule planning period must =< the schedule planning period value.
- The weekly value must be => Daily Minimum Paid Hours x Minimum Working Days per Week
- The weekly value divided by Daily Minimum Paid Hours must be >= Maximum Working Days per week.

Maximum Consecutive Working Days—The maximum number of consecutive days that agents assigned to this contract type are allowed to work.

Daily Valid Values: 1-365 days

Weekly Valid Values: Not Applicable

Schedule Planning Period Valid Values: Not Applicable

Rules

- Must => Minimum Working Days per Week.
- If Maximum Working Days per Week is less than 7, must be <= Maximum Working Days per Week x 2.
- This value can exceed the Maximum Working days per Week only when the Maximum Working days per Week is 7.

Maximum Consecutive Working Weekends—The maximum number of consecutive weekends that agents assigned to this contract type are allowed to work. Note that a “working weekend” occurs when at least one of the weekend's days is scheduled for work.

Daily Valid Values: Not Applicable

Weekly Valid Values: Not Applicable

Schedule Planning Period Valid Values: 0-6 or unlimited

Rules

- Turn the constraint OFF one of two ways:
- Set the value of value **Maximum Consecutive Working Weekends** to 0. This is the default setting.
- Select the **Unlimited** check box, which is located on the right side of the same line. This is the default setting.

Minimum Working Days per Week—The minimum number of days that agents assigned to this contract must work per week.

Daily Valid Values: Not Applicable

Weekly Valid Values: 0-7 days

Schedule Planning Period Valid Values: Not Applicable

Rules

- Must be <= Maximum Working Days per Week.
- This value x Daily Minimum Paid Hours must <= Weekly Maximum Paid Hours.

- This value must => Weekly Minimum Paid Hours divided by Daily Maximum Paid Hours.
- This value must be <= the number of available days per week set on the Availability Pattern tab.
- If you set the Weekly Minimum Paid Hours and the Minimum Working Days per Week values to 0, Scheduler has the option of assigning an agent a week off if there is insufficient work.

Maximum Working Days per Week—The maximum number of days that agents assigned to this contract are allowed to work per week.

Daily Valid Values: Not Applicable

Weekly Valid Values: 0-7 days

Schedule Planning Period Valid Values: Not Applicable

Rules

- Must be >= Minimum Working Days per Week.
- Must be <= Weekly Maximum Paid Hours divided by Daily Minimum Paid Hours.

Use Synchronization of Daily Schedules—See Synchronization, below.

Advanced—Opens the Advanced Hours window, in which you can specify minimum and maximum working hours for each month of the year. This button is enabled only if you are using the Monthly schedule planning period.

Synchronization of Daily Schedules

Enable this group of settings by selecting the check box **Use Synchronization of Daily Schedules**.

Using synchronization ensures that an agent starts each workday within a user-defined time threshold.

Synchronization includes the option Shift Start Time Flexibility. This option allows the schedule start/end times to vary within a specified range. Allowing some flexibility enables you to create a more optimal schedule.

Note: The synchronization setting and the schedule planning period affect how Workforce Management aligns agent start times:

- If the synchronization period is shorter, but fits exactly into the schedule planning period, synchronization will be complete. For example, if the synchronization period is two weeks and the schedule is six weeks, three synchronization periods exactly fit the schedule.
- If the synchronization period is shorter than the schedule planning period, only the time covered by the synchronization period will be synchronized. The rest of the schedule will not be synchronized. For example, if the synchronization period is four weeks and the schedule is six weeks, the first four weeks will be synchronized, but the final two weeks will not be.

- If the synchronization setting is longer than the schedule planning period, no synchronization will occur. For example, if synchronization is set to four weeks, but a schedule is built for three weeks, synchronization is disabled for the entire schedule.

To use synchronization:

1. Select the Use Synchronization of Daily Schedules check box and select either the Use [X] Week Period radio button or the Use Schedule Planning Period radio button.
2. If using Use [X] Week Period, enter the required number of weeks in the text box, or use the arrows to navigate to the correct number.
3. If necessary, change Shift Start Time Flexibility settings.
   - For strict start time synchronization, leave Shift Start Time Flexibility set to the default 00:00.
   - To change Shift Start Time Flexibility settings, enter the number of minutes or hours by which Scheduler can adjust the synchronized schedule, or highlight the hour or minute in the text box and use the arrows to adjust the selected time.
4. If necessary, change the Synchronization Type setting. Select one of these choices from the drop-down menu:
   - Shift Start (default)
   - Shift Start and Duration
   - Shift Start, Duration, and Meals' Starts
   - Shift Start, Duration, Start of Meals, and Breaks

   Note: Scheduler will attempt to synchronize by all parameters in your selection.

5. If necessary, change the Applicable Days setting. By default, all check boxes (Sun, Mon, Tue, Wed, Thu, Fri, Sat) are selected. To specify a day of the week to which synchronization does not apply, clear that day's check box. For example, to exclude the standard weekend, clear the check boxes for Saturday and Sunday.
6. To disable synchronization, clear the Use Synchronization of Daily Schedules check box.

Contract Advanced Hours

The Advanced button on the Contracts Constraints tab, which opens the Advanced Hours window, is available only if you are using Monthly schedule planning periods.

The Advanced Hours window defines Contract minimum and maximum hours.

The values in this window override the standard Contract hours. You can use these values if you have to customize monthly workloads to handle seasonal variations in staffing requirements.

Note: If you set the value for a month to 0, the Contract constraints for monthly minimum and maximum working hours are used.

Contract Availability Patterns

You use the Contract Availability tab when you create a new contract or when you edit an existing contract. To bring up the Availability Pattern tab for an existing contract:

1. Expand Policies on the Modules pane and click **Contracts.**
2. Select an existing contract on the Objects pane.
3. Select the Availability Pattern tab.

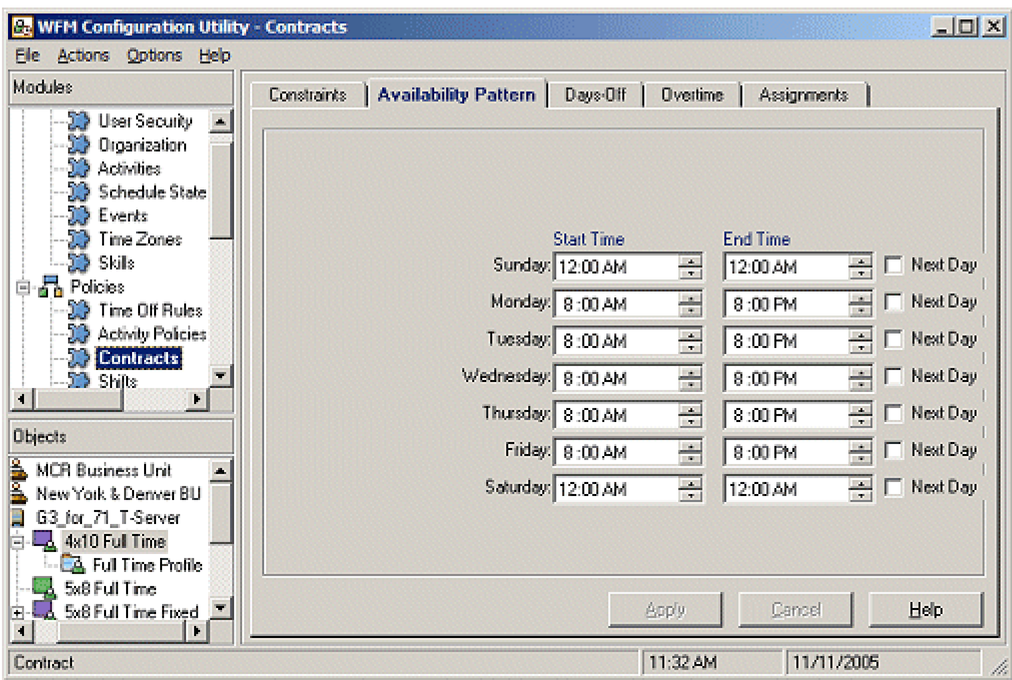

Figure 80: Contracts module, Availability Pattern tab

Use the Availability Pattern tab to define the days and hours that each contract can be scheduled.

You can only schedule a contract within the parameters set here, but you can changes these hours at any time.

Note: This availability pattern setting is not the same as the availability preferences setting that you configured in the Calendar. Availability preferences requested in Calendar apply to single agents, as do the daily availabilities that the preferences are based on. The Contract Availability Pattern tab sets the default daily availability for the entire contract type.

Defining Availability Pattern Hours

To define availability pattern hours:

1. Enter the start time and end time, in hours and minutes, that this contract must be available for work for each day of the week.
2. If the availability extends past midnight, select the Next Day check box.

   The maximum availability duration is 36 hours, which can occur only when the shift start time is midnight. If you use a different shift start time, you must adjust the end time to ensure that it does not violate the 36 hour maximum.

   For example, if the shift start time is 1:00 AM, the maximum duration is 36 hours minus the number of hours between midnight and the start time. In this case, the you must set the end time to 12:00 noon, so that the maximum duration is 35 hours.

   This rule that the duration set by the start time and end time must be less than or equal to 36 hours applies to each 15–minute timestep. So if your shift start time is 8:30 AM, the maximum duration is 36 - 8.5 = 27.5 hours. Therefore, the latest end time you can enter using this example is 12:00 noon.

   The duration must be greater than or equal to the Minimum Daily Working Hours.
3. Click **Apply.**

Editing Available Patterns

To modify the contract availability pattern:

1. Select the contract and redefine the hours on the Availability Pattern tab.

Contract Days Off

You use the Days Off tab when you create a new contract or when you edit an existing contract.

To bring up the Days Off tab for an existing contract:

1. Expand **Policies** on the Modules pane and click **Contracts.**

2. Select an existing contract on the Objects pane.
3. Select the **Days-Off** tab.

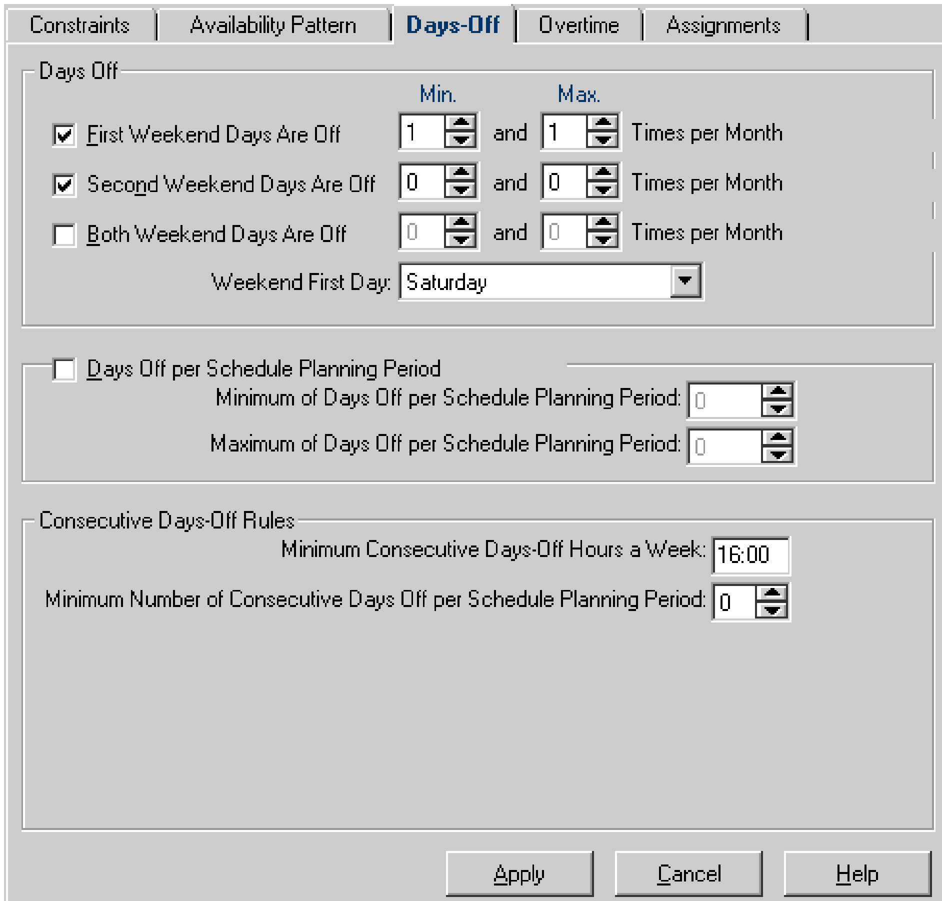

Figure 81: Contracts module, Days-Off tab

Use the Days Off tab to ensure that each contract receives a set number of days off per scheduling period.

You can also use this tab to configure specific rules for weekend days off and consecutive days off.

Contract Days-Off Properties

Days-Off pane

This pane defines the minimum and maximum number of times per user-defined schedule planning period (none, two to six weeks, or one month) that agents who are assigned to this contract must have a specified day or days off. The schedule planning period is set on the Contracts General tab.

A Note about Terminology: Many of the world's workers take their weekends on Saturday and Sunday—but not all. To assign a different weekend, select the first day of the weekend from the drop-down list Weekend First Day. Thus, you can alter a contract's settings for weekends quickly and easily with a single adjustment.

If your schedule planning period is one month, you can enter up to five First Weekend Days, Second Weekend Days, and weekends off.

First Weekend Days Are Off—When enabled, this feature guarantees that an agent has a specified number of First Weekend Days off per schedule planning period. Select the minimum and maximum number of times per schedule planning period that the contract must be excluded from the First Weekend Days schedule.

Second Weekend Days Are Off—When enabled, this feature guarantees that an agent has a specified number of Second Weekend Days off per schedule planning period. Select the minimum and maximum number of times per schedule planning period that the contract must be excluded from the Second Weekend Days schedule.

Both Weekend Days Are Off—When enabled, this feature guarantees that agents of the contract are scheduled with the entire weekend off. Select the minimum and maximum number of times per schedule planning period that the contract must be excluded from the weekend schedule.

Note: If you select Both Weekend Days Are Off, you should still set the properties for the individual weekend days off. Both Weekend Days Are Off does not replace First Weekend Days Are Off and Second Weekend Days Are Off.

Weekend First Day—If Saturday is the first day of this contract's weekend, keep the default setting (Saturday). If this contract's weekend starts on a different day, select that day from the drop-down list.

Minimum and Maximum Days Off per Schedule Planning Period—An optional parameter that allows you to set minimum and maximum days off per schedule planning period. These days off can occur on any day of the week.

Consecutive Days-Off Rules pane

Minimum Consecutive Days Off Hours per Week—This setting enables you to ensure adherence with legal or company-set requirements for minimum consecutive hours off per week.

Note: If the value is more than 24:00, then the Minimum Working Days per Week constraint should not exceed 6 days, which leaves room for at least one day off to satisfy this constraint, and this constraint is satisfied if it is obeyed at least once a week.

Minimum Number of Consecutive Days Off per Schedule Planning Period—Enter or select the minimum number of consecutive days off that agents must receive at some point during the schedule planning period.

Contract Overtime

You use the Contract Overtime tab when you create a new contract or when you edit an existing contract. To bring up the Contract Overtime tab for an existing contract:

1. Expand Policies on the Modules pane and click **Contracts.**
2. Select an existing contract on the Objects pane.
3. Select the Overtime tab.

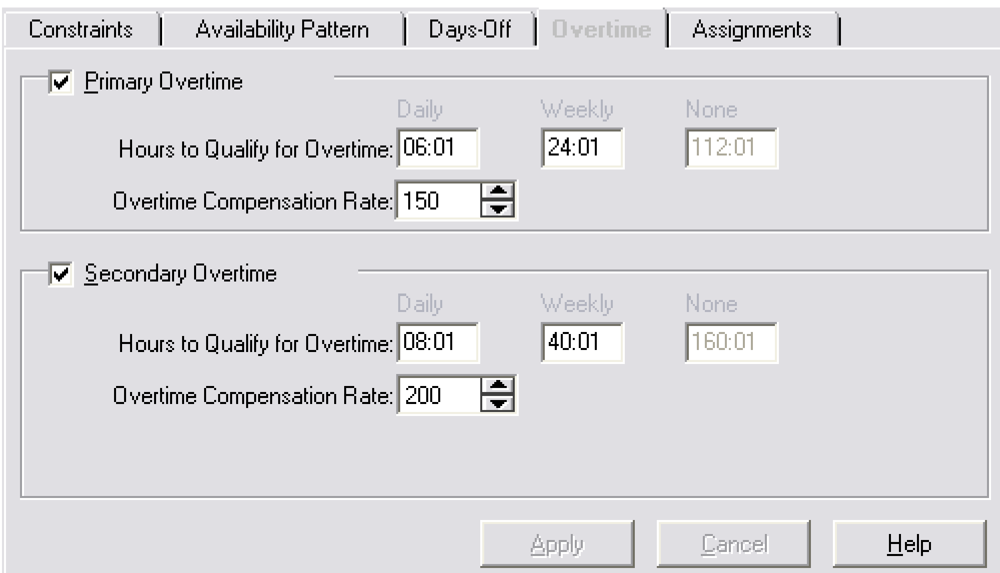

Figure 82: Contracts module, Overtime tab

Use the information in the Contract Overtime tab to determine whether agent work hours qualify as overtime hours when scheduling contact center activity.

You can configure two different types of overtime: primary and secondary. For example, an agent might qualify for time-and-a-half pay for all hours worked over 40 per week but under 60 (primary overtime), then double-time pay for all hours over 60 per week (secondary overtime).

Overtime Properties

Hours to Qualify for Overtime—The number of hours that agents assigned to the contract must work before being qualified for overtime compensation, expressed by day, week, and month. You can set values for any of the periods or for all three.

You can configure Primary and Secondary schedule planning period and weekly hours to qualify for overtime with a 1-minute time unit.

Overtime Compensation Rate—The additional salary percentage for this type of overtime. For example, if the agent is to be paid time-and-a-half, the value is 150.

Contract Assignments

You use the Contract Assignments tab when you create a new contract or when you edit an existing contract. To bring up the Assignments tab for an existing contract:

1. Expand Policies on the Modules pane and click **Contracts.**
2. Select an existing contract on the Objects pane.
3. Select the Assignments tab.

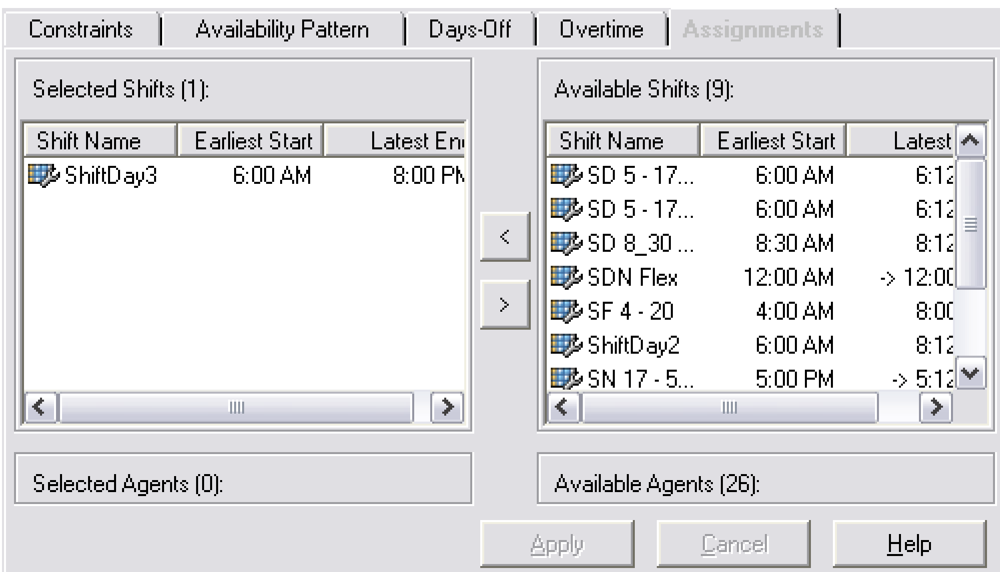

Figure 83: Contracts module, Assignments tab

Use the Contracts Assignments tab to assign shifts and agents to a contract.

To assign a shift or agent to this contract:

1. Select it in the Available Shifts or Available Agents list.
2. Click the < arrow to move it to the Selected Shifts or Selected Agents list.
3. To remove a shift or agent, select from the Selected Shifts or Selected Agents list and then click the > button.
4. Click **Apply** to save changes or **Cancel** to discard them.

Shifts—The shifts that can be associated with this contract. All shifts configured for the contract site are listed. The shifts you select must have settings compatible with the contract settings. An error message appears if the settings are not compatible. If the settings for at least one day are compatible, the association is accepted.

Agents—The agents that can be associated with this contract. All agents from the current site are listed.

Configuring Profiles

Profiles are descriptions of “virtual” agents.

You can configure multiple profiles for each contract by selecting typical sets of skills. Scheduler uses contract parameters, combined with the profiles' skill sets, to produce blank schedule scenarios that are based on profile characteristics rather than on the actual agent pool. This is especially useful if you have not yet hired agents.

These blank schedule scenarios provide you with an unlimited number of “what-if” assessments of the number of agents of each contract and skill set that might be required. You can manually assign agents into the schedule after it is built.

You can create a totally new profile or copy and paste an existing one.

To create a new profile:

1. Click Contracts on the Modules pane and then select a specific contract within a site.
2. Right-click the contract or any existing profile and select **New Profile** from the shortcut menu. The figure below shows the resulting Data pane.

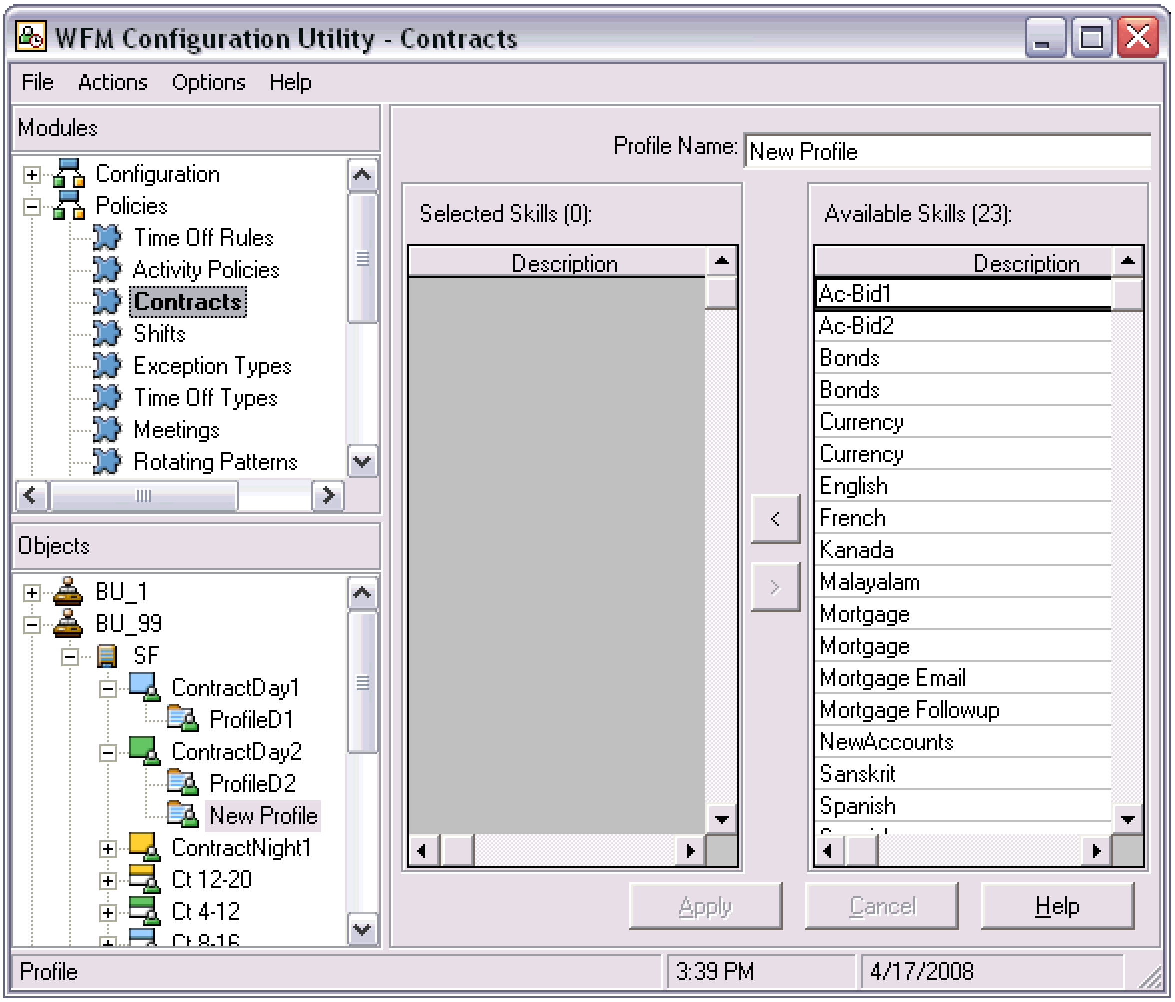

Figure 84: Contracts module, New Profile

3. Enter a name for the profile in the Name text box on the right-hand pane.

   The name should be descriptive and different from any other profile name within the contract.

4. Select a skill from the Available Skills pane and click < to add it to the profile's skill set, shown in the Selected Skills list pane.

   Note: To remove skills from the Selected Skills list, select a skill and click >.

   You can move multiple skills by holding down [Ctrl] or [Shift] while selecting them.

5. Enter the correct skill level in the Level column of the Selected Skills pane next to the appropriate skill.

Note: The value that you enter will affect the profile's availability in the Select Profiles page of the Schedule Scenario Wizard. That page displays only profiles with a skill level that falls within the required range of the Activities you are scheduling. For example, if you define a profile here with a Stocks & Bonds skill level of 5 and then use the wizard to create a scenario that requires a Stocks & Bonds skill level of 7-15, your profile will not appear as a choice.

6. Continue to add skills and set skill levels until you have fully configured the profile.
7. Click **Apply** to save the profile settings.

To create a new profile using copy and paste:

1. Select a profile.
2. Right-click it and then select **Copy Profile.**
3. Right-click a contract or any existing profile within that contract and then select **Paste <*profile_name*> Copy.**

   The new profile appears on the Objects pane with the default name *New Profile*.
4. Configure the profile. The settings are described in Steps 3–7 above.

Shifts

Overview

A *shift* defines basic workday parameters. Shifts are defined by time of day, duration, and days of the week. Create, edit, and delete shifts by clicking **Shift** on the Modules pane and selecting the appropriate site or shift on the Objects pane.

Creating New Shifts

You can create an entirely new shift or create a new one by copying an pasting an existing shift.

To create a new shift:

1. Expand Policies on the Modules pane and click **Shifts.**
2. Select and then right-click a site or an existing shift on the Objects pane.
3. Select **New Shift** from the shortcut menu.

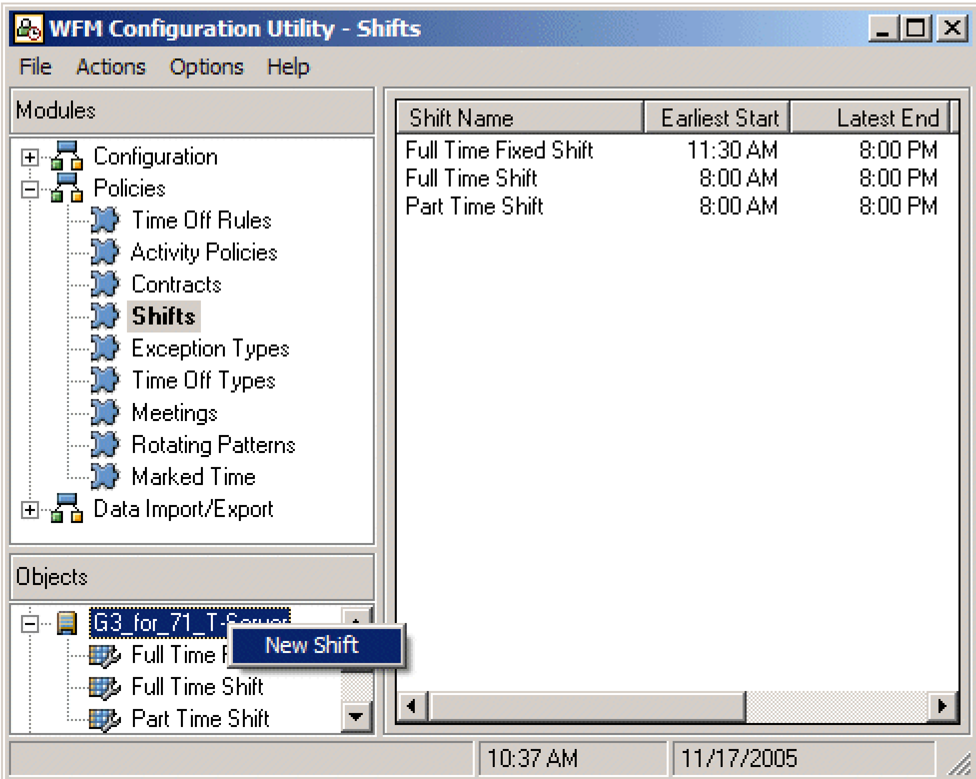

Figure 85: Creating a New Shift

To copy and paste an existing shift:

1. Select a shift.
2. Right-click it and then select **Copy Shift.**
3. Right-click a site or any existing shift within that site and then select **Paste <*shift_name*> Copy.**

Whichever method you use, the new shift appears on the Objects pane with the default name *New Shift*.

The tabs you use to configure the new shift appear in the right pane:

- General
- Contract Assignments
- Task Sequences
- Shift Items

Shift Number Limitation During Building

You can not build a schedule with more than 100 shifts configured. (In releases of Workforce Management (WFM) earlier than 7.6, the limit was 29 shifts.)

Count all the agents configured for your schedule scenario, all their different contracts, and all the different shifts associated with those contracts. The total number of shifts cannot exceed 100. If it does, your build will fail, and WFM will display:

```
Error 43: Too many shifts: the maximum number is 100, but more than
100 were requested.
```

Please note that you can *configure* more than 100 shifts in your WFM database; the limitation is that you cannot *associate* more than 100 shifts with a single schedule.

Use Rotating Patterns to Solve a “Too Many Shifts” Problem

A Call Center might configure a very large number of shifts, because the managers believe that multiple shifts are the only way to create “fixed” schedules. However, rotating patterns can accommodate many different types of schedules, including both fixed and flexible schedules, using very few shifts. For example, you could create weekly rotating patterns to configure a fixed schedule that uses just one shift.

Editing Shifts

To edit a shift:

1. Select the shift you want to modify on the Objects pane.

2. Make the necessary changes on each tab.

3. Click **Apply.**

Deleting Shifts

To delete a shift:

1. Right-click the shift you want to delete on the Objects pane.

2. Select **Delete** from the shortcut menu.

Note: You cannot delete a shift that appears in a schedule scenario or in the master schedule.

Shifts General Tab

Use the Shifts General tab to define the general shift parameters. The figure below shows an example completed tab.

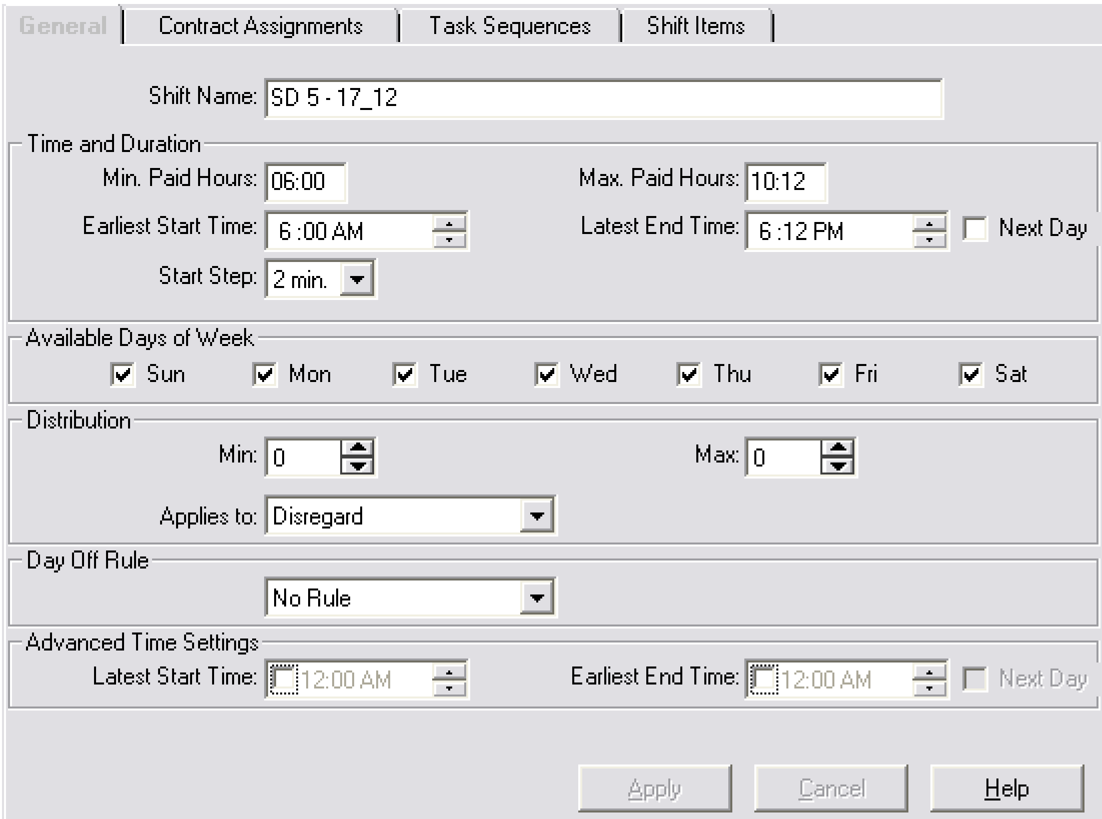

Figure 86: Shifts General tab

Shift Name—The name for this shift. Use names, such as *First Shift*, *Swing Shift*, or *Second Shift*, that identify the shift type. The name must be unique within the site.

Time and Duration

Min. Paid Hours—The minimum number of hours defined for this shift, entered in hh:mm format. All contracts assigned to the shift must be available to work at least this number of hours. Valid values are 00:01 to 23:45. This value must be less than or equal to the Maximum Daily Paid Hours setting in the associated contract. Must include all paid breaks and meals.

Max. Paid Hours—The maximum number of hours defined for this shift, entered in hh:mm format. Valid values are 00:01 to 23:45. This value must be greater than or equal to the Minimum Daily Paid Hours setting in the associated contract. Must include all paid breaks and meals.

Earliest Start Time—The earliest time that this shift can start. Some sites stagger shifts so that, for example, all third-shift agents arrive between 7:15 and 8:15. The earliest start time for this shift would then be 7:15.**Max. Paid Hours—**The maximum number of hours defined for this shift, entered in hh:mm format. Contracts assigned to the shift must be available to work at least this number of hours. Valid values are 00:01 to 23:45. This value must be greater than or equal to the Minimum Daily Paid Hours setting in the associated contract. Must include all paid breaks and meals.

Latest End Time—The latest time that this shift can end. Shift agents can end their shift at staggered intervals that correspond to the stagger at the beginning of the shift. For example, a shift that starts between 7:15 and 8:15 can end between 3:15 and 4:15. The latest end time for this shift would then be 4:15.

Next Day—When selected, indicates that this shift can end during the next day.

Start Step—If using staggered start times for various agents working a shift, the Start Step is the increment of time between possible shift start times. Scheduler uses this Start Step to configure agent schedules. The start step can be any number of minutes between 1-120.

Note: The Earliest Start Time's last two digits must be either :00 or an even multiple of the Start Step entry; otherwise, Scheduler disregards the Start Step entry and defaults to a Start Step of 15 min. For example: If you set an Earliest Start Time of 9:15 and a Start Step option of 30 minutes, the Scheduler disregards the Start Step entry (because 15 is neither equal to nor a multiple of 30), and starts shifts at 9:15, 9:30, 9:45, 10:00, and so on.

Available Days of Week—The days of the week for which this shift can be assigned by the scheduling algorithm. By default, all days are selected.

Distribution

Min.—The minimum number of occurrences of the shift for each agent whose contract is associated with the shift.

Max.—The maximum number of occurrences of the shift for each agent whose contract is associated with the shift.

Applies To—The period of time for which Scheduler should apply the distribution minimum and maximum.

- Disregard—Distribution properties are not applied.
- Every Week—The Min./Max. are considered on a weekly basis. Amounts entered should equal the numbers required for one week.
- Schedule Planning Period—Distribution properties are applied to the schedule planning period. Distribution amounts entered should equal the numbers required for the entire schedule planning period.

Days-Off Rule—The rules that can be defined for the days off that are associated with the shift.

- No Rule means there are no rules about days off.
- There are three possible day-off rules:
  - Next day—If agents work this shift, they get the next day off.

- Previous day—If agents work this shift, they get the previous day off.
- Next day is not off—If agents work this shift, they cannot get the next day off.

Advanced Time Settings—Use these optional time settings to narrow the range of time during which the start or end of the shift can be scheduled.

- You can create a fixed start or end time for the shift. For example, to set a fixed start time, set the Latest Start Time field to the same time as the Earliest Start Time field. The total shift duration then remains flexible.

Warning! If you set fixed start *and* end times for your shift, the shift will be too inflexible to create optimal schedules.

Latest Start Time—The latest time that this shift can start. Some sites stagger shifts so that, for example, all third-shift agents arrive between 7:15 and 8:15. The latest start time for this shift would then be 8:15.

Earliest End Time—The earliest time that this shift can end. Shift agents can end their shift at staggered intervals that correspond to the stagger at the beginning of the shift. For example, a shift that starts between 7:15 and 8:15 might end between 3:15 and 4:15. The earliest end time for this shift would then be 3:15.

Shift Contract Assignments

Use the Shifts Contract Assignments tab to assign contracts to a shift.

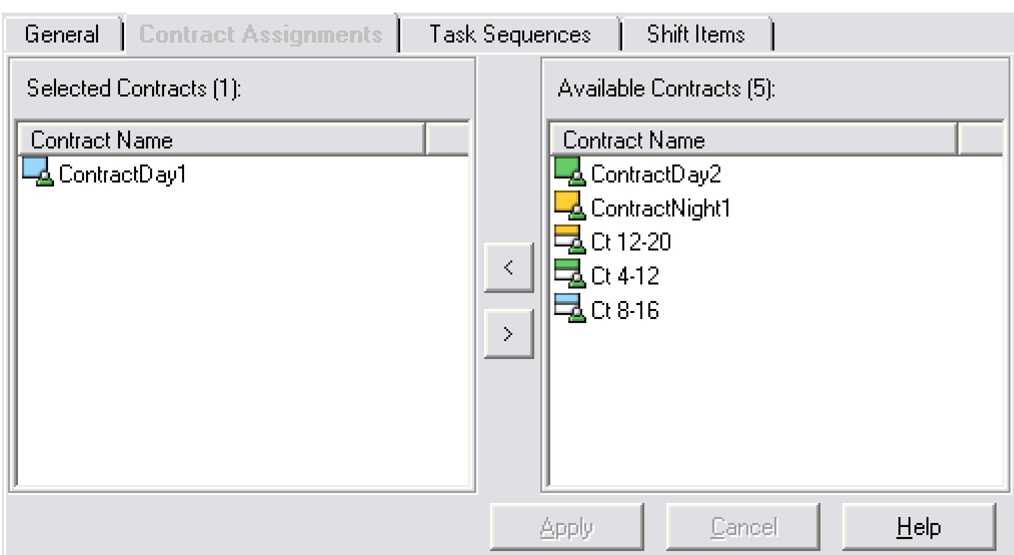

Figure 87: Shifts, Contract Assignments tab

This tab contains Selected Contract and Available Contracts lists, which together comprise all contracts configured for the current site. You can also assign contracts to a shift by using the Associations tab for a selected contract.

Note: Assigning contracts to a shift is optional. You can save a shift without associating it with a contract.

To assign a contract to a shift:

1. Select one or more contracts from the list on the Available Contracts pane. You can assign multiple contracts to a single shift.
2. Click < to move the selected contracts into the Selected Contracts pane.

   To remove a contract from a shift, select it on the Selected Contracts pane and then click > to move it to the Available Contracts pane.
3. Click **Apply** when you have finished assigning contracts.

Shift Task Sequences

Task sequences define periods of time during which agents can work only on a specified set of tasks—configured as one or more activity sets. Time that is not included in a task sequence can include any work that the agent has the skills to perform and which is not part of any configured activity set.

For examples and more detailed information on task sequences than presented here, see the *Workforce Management Administrator's Guide.*

Use the Shift Task Sequences tab to create, edit, or delete task sequences or to assign task sequences to the shift.

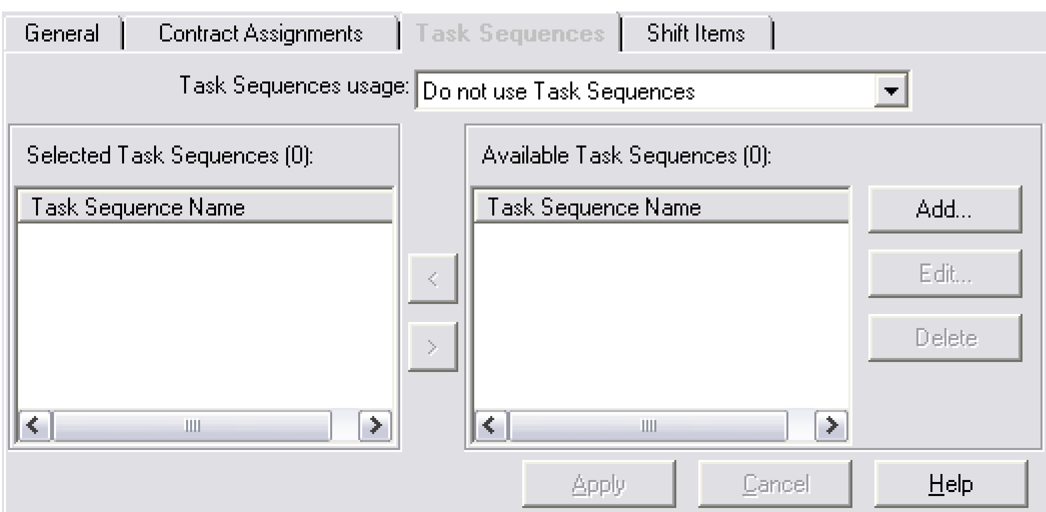

Figure 88: Shifts, Task Sequences tab

- Although you create task sequences during configuration of a particular shift, after they have been created you can assign task sequences to any compatible shift within the same site.
- To be compatible, task sequence settings must not conflict with meal settings.

Note: Task sequences are optional. However, if any task sequences are defined for a shift, the shift must include at least one task sequence.

Create a Task Sequence

To create a task sequence:

1. Select a shift on the Objects pane and click the Task Sequences tab on the right-hand pane.
2. Select a setting from the Task Sequences Usage drop-down menu.
3. Click **Add** to open the TS Add window. See Adding and Editing Task Sequences for information on configuring the new task sequence.

Assign Task Sequences to a Shift

All task sequences for the current site are listed in one of the two panes on this tab. Those associated with the currently selected shift are listed in the Selected Task Sequences pane.

To assign a task sequence to the shift:

1. Select the task sequence on the Available Task Sequences pane.
2. Click the < button.

To remove a task sequence from a shift:

1. Select the task sequence on the Selected Task Sequences pane.
2. Click the > button.

When you have finished configuring and assigning task sequences:

3. Click **Apply.**

Edit Task Sequences

To edit a task sequence:

1. Select a shift on the Objects pane and click the Task Sequences tab on the right-hand pane.
2. Select the task sequence you want to edit.
3. Click **Edit** to open the TS Edit window. See Adding and Editing Task Sequences for information on configuring the new task sequence.

Delete Task Sequences

To delete a task sequence:

1. Select a shift on the Objects pane and click the Task Sequences tab on the right-hand pane.
2. Select the task sequence you want to delete.
3. Click **Delete.**

Adding and Editing Task Sequences

Use the Task Sequences window to create and edit task sequences.

To open the Task Sequence (Add/Edit) window:

1. Click **Shifts** on the Modules pane and then select a shift on the Objects pane.
2. Click the Task Sequences tab.
   - To create a new task sequence, click **Add.** The Task Sequence (Add) dialog box opens.
   - To edit an existing one, move it to the Available pane (if necessary), select it, and then click **Edit.** The Task Sequence (Edit) dialog box opens.

If you are adding a new task sequence:

1. Enter a task sequence name to replace the default name. The name must be unique within the site.

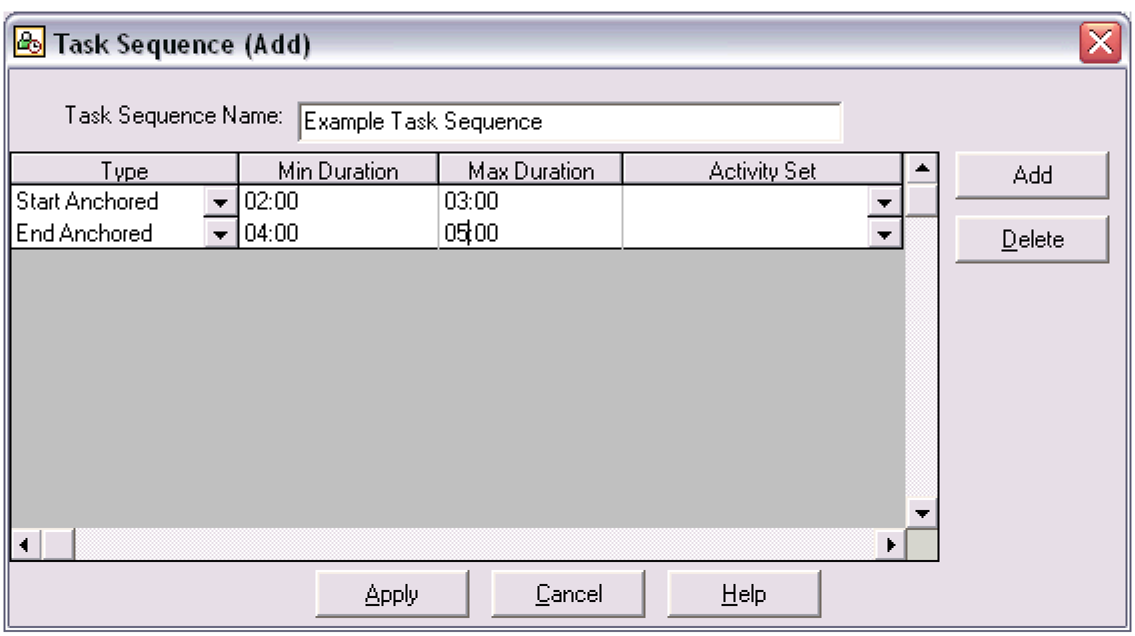

Figure 89: Task Sequence (Add) Window

2. Click **Add** to create a new row in the task sequence list.
3. Configure the settings as described below. You can add as many rows as you need.
4. After fully configuring your task sequence, click **Apply.**

If you are editing an existing task sequence:

1. Make your changes. If you need to add more rows to your task sequence list, click **Add.**

Note: The difference between the minimum duration and maximum duration of the task sequence must be greater than or equal to the minimum duration of the selected activity set.

Task Sequences Settings

Type—Select one of the four valid values from the drop-down menu. You can choose to have the task sequence float anywhere in the shift (Not Anchored).

If you select one of the other settings, one or both of the task sequence's ends must link with either a shift boundary or another task sequence's boundary.

If you are using more than one task sequence, you must configure compatible combinations of anchor settings. For example, if you are using two task sequences, you cannot set them *both* to Start Anchored or End Anchored.

- **Not Anchored—**The task sequence can occur any time during the shift.
- **Start Anchored—**The task sequence must either start at the same time as the shift or start immediately after another task sequence ends. That is, the beginning of this task sequence must link up with another boundary, but the end cannot.
- **End Anchored—**The task sequence must either end at the same time as the shift ends or another task sequence must immediately follow it. That is, the end of this task sequence must link up with another boundary, but the beginning cannot.
- **Start/End Anchored—**Both the start and end of the task sequence must link to either the shift start time, the shift end time, or the boundary of another task sequence.

Min Duration—The minimum duration, in hh:mm format, for this task sequence.

Max Duration—The maximum duration, in hh:mm format, for this task sequence.

Activity Set—You can use any activity set that is configured for the current site. You can use the same activity set in any number of task sequences. For more information on activity sets, see Activity Sets.

Note: The minimum duration of an activity set that is configured as part of a task sequence must be less than or equal to the maximum possible duration of the shift for which that task sequence has been configured.

Shift Items

Shift items are breaks and meals.

Use the Shift Items tab to create, edit, and delete breaks and meals and to arrange them into patterns called *shift items sequences*.

To open the Shift Items tab:

1. Click **Shifts** on the Modules pane.
2. Select a shift on the Objects pane.
3. Click the Shift Items tab on the Data pane. The figure below shows an example Shift Items tab.

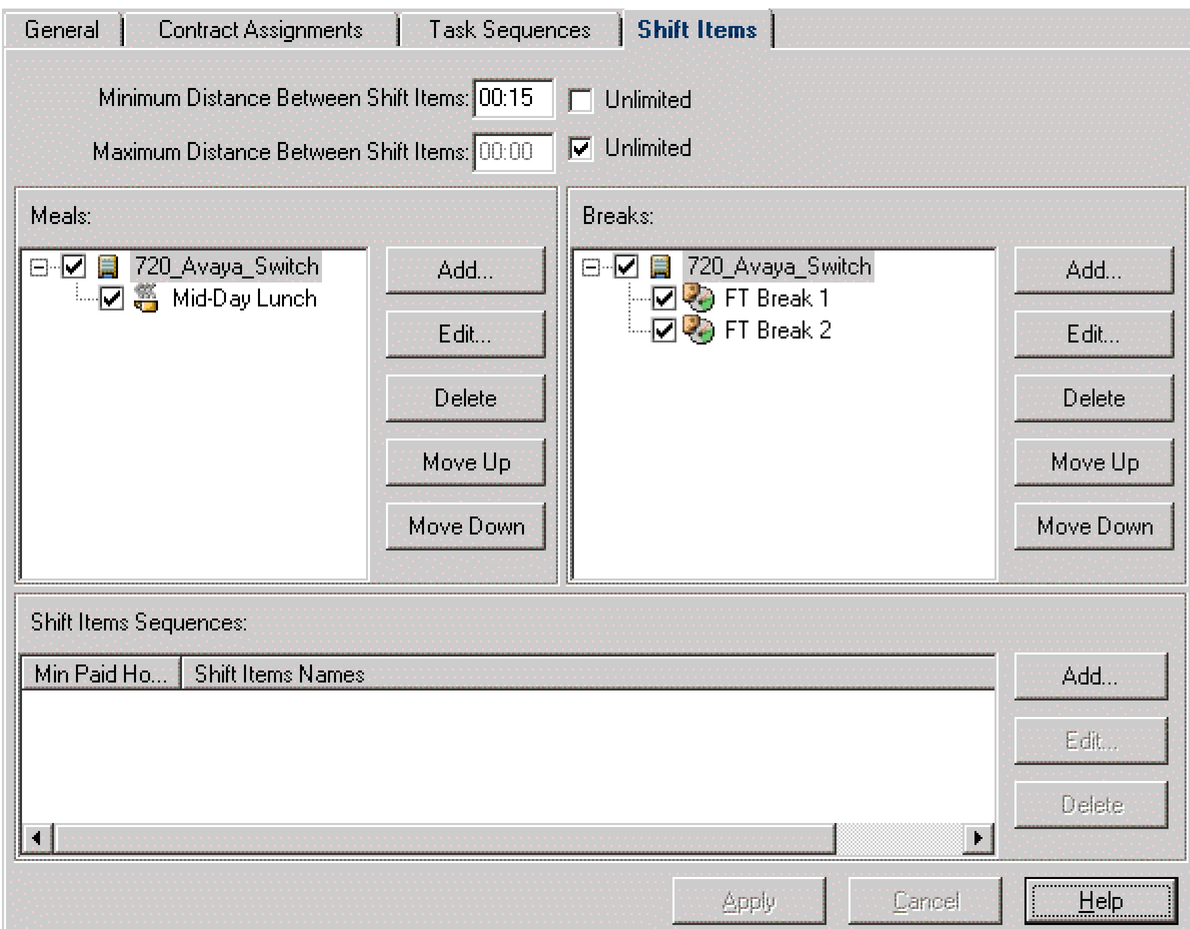

Figure 90: Shift Items tab

To configure shift items:

1. To configure Minimum Distance Between Shift Items, select the time, in minutes, that must elapse between one shift item and the next. This parameter sets the minimum required distance between meals and breaks.
2. To configure Maximum Distance Between Shift Items, select the time, in minutes, that represents the maximum that can elapse between one shift item and the next. This parameter sets the maximum allowed distance between meals and breaks, between shift start and first shift item, and between last shift item and shift end. The initial display is 00:00; but the control is actually disabled until the first time that you clear the check box. Range: 00:00—36:00
3. To create a new meal, click the appropriate Add button. To change settings for a meal, select it and then click **Edit.** See Adding and Editing Meals for information on configuring meals.
4. To create a new break, click the appropriate Add button. To change settings for a break, select it and then click **Edit.** See Adding and Editing Breaks for information on configuring breaks.

> Note: When you edit, delete, or change the order of meals or breaks in a shift item sequence, that sequence is deleted.

5. Click **Move Up** or **Move Down** to arrange the breaks in the order in which you want them to occur if more than one is included in a Shift Item Sequence.

   The order of meals is fixed. You can only modify the order by changing the position of breaks around them, using Move Up and Move Down. To change the order in which meals occur, you must return to the Meals pane and make changes there.

> Warning! Changing the order of meals on the Meals pane automatically deletes all Shift Item Sequences that include those meals.

6. Create a Shift Item Sequence if you want to create a pattern of breaks and meals to apply to a shift. See Shift Items Sequences for information on configuring new sequences or editing existing ones.
7. When you have finished configuring the shift items, click **Apply** to save the settings or **Cancel** to discard them.

Shift Items Sequences

A shift item sequence enables you to arrange meals and breaks so that they occur in a specific order during the shift.

When you create multiple shift item sequences for the same shift, Scheduler first sets the shift and then checks for compatible shift item sequences for that shift. Scheduler checks shift work duration and meal constraints to select the optimal shift item sequence.

Note: When you edit, delete, or change the order of meals or breaks in a shift item sequence, that sequence is deleted.

Shift item sequences appear in the list pane at the bottom of the Shift Items tab. This list shows these shift item sequence properties:

- **Min Paid Hours—**The shortest period of time that can be scheduled for this shift item sequence.

  If the check box to the left of the value is selected, this shift item sequence is enabled and can be used in schedules.

  If the check box to the left of the value is cleared, this shift item sequence is disabled and cannot be used in schedules.
- **Shift Items—**The shift items included in the sequence, listed in the correct order.

Adding and Editing Shift Item Sequences

- To create a new shift item sequence, click the Add button next to the Shift Items Sequences pane.
- To edit a shift item sequence, select it on the Shift Items Sequences pane and then click **Edit.**

The Shift Items Sequence Add/Edit window opens. The meals are displayed in the Sequence list pane. All breaks are listed on the Breaks list pane.

Note: All meals *must* be included in the shift item sequence in the order in which they are arranged on the Meals list pane of the Shift Items tab.

To configure the shift item sequence:

1. Select the breaks you want and click the **>** button to move them to the Sequence pane.

   To remove a break, select it and click **<** to move it back to the Breaks pane.
2. Click **Move Up** and **Move Down** to change the placement of a selected item.

   Note: You cannot use Move Up and Move Down to change the order of the meals. If moving the selected item up or down would change the meal order, then clicking the button has no effect. To change the meal order, return to the Meals pane on the Shift Items tab and make the change there. If you do so, your all shift item sequences are deleted and you must recreate them.

3. Enter the minimum duration for the shift item sequence. You can enter a value directly or use the up and down arrows to adjust the value.
4. Select the Allowed check box to activate this shift item sequence. If you do not want to use the shift item sequence in schedules for a certain period of time, you can clear this check box rather than deleting the shift item sequence. This keeps the sequence available for when you want to use it again.
5. When you have finished, click **OK.** To discard all changes, click **Cancel.**

The new or edited shift item sequence appears on the Shift Items Sequence list pane. This list is always sorted by the value in the Minimum Duration column.

Adding and Editing Meals

Create a new meal for each shift that is included in the schedule. For example, if your site operates 24 hours a day, you might need to create meals called *Breakfast, Lunch, Dinner,* and *Swing.*

Meals are always linked to a shift. These meals apply to all contracts associated with the shift. If a conflict arises that prevents a meal from being scheduled for an agent, the shift containing the meal cannot be assigned to the agent.

Note: If no restrictions are involved (for example, a cafeteria with limited hours of operation), then configure regular breaks instead of meals for each shift.

To configure a meal:

1. Click **Shifts** on the Modules pane and then select a specific shift on the Objects pane.
2. Click the Shift Items tab.
3. To add a new meal, click **Add.** To edit an existing meal, select it and then click **Edit.** The figure below shows an example Meal (Edit) dialog box.

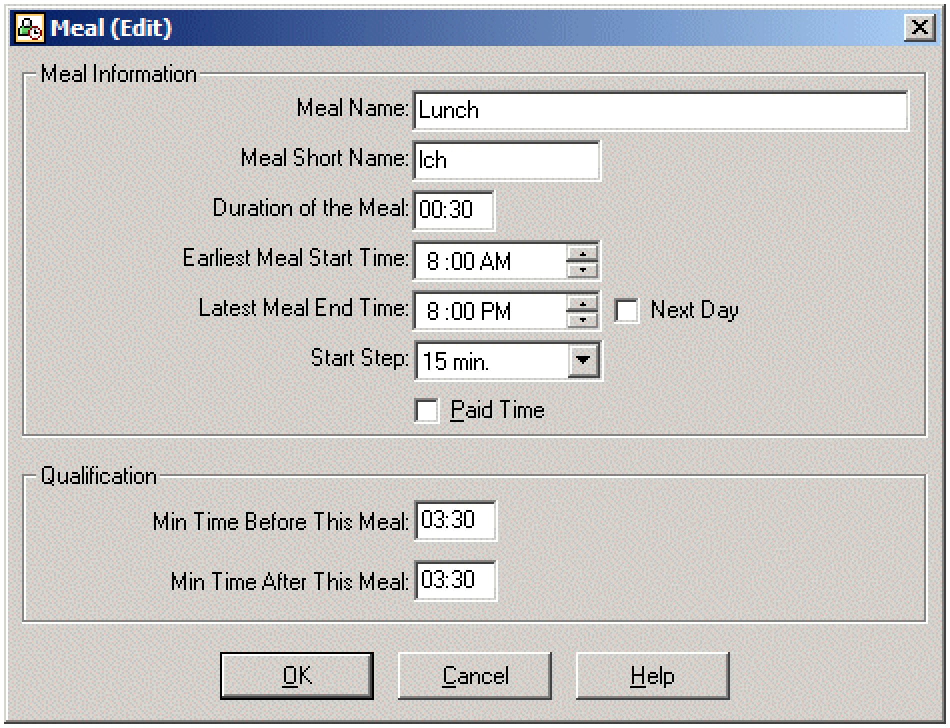

Figure 91: Meal (Edit) dialog box

4. Enter or change settings for the meal based on the properties definitions below.
5. Click **OK.**

Meals Properties

Meal Name—The name of the meal. Use names, such as *Lunch*, *Dinner,* or *Midafternoon break*, that identify the meal type. The meal name must be unique within the site.

Meal Short Name—Enter a short name of up to 6 characters (or 3 double-byte characters) to identify this meal. The short name appears in schedule displays.

Duration of the Meal—The duration of this meal in one-minute increments, entered in hh:mm format.

Earliest Start Time—The earliest time that agents can begin to take this meal. This value plus the Duration cannot extend past the Latest End Time value.

Latest End Time—The latest time that agents can complete this meal.

Start Step—The increments between meal start times. For example, with a start step of 15 minutes, agents leave for lunch 15 minutes apart.

Paid Time—If selected, this meal is paid. If cleared, this meal is unpaid.

Qualification

Minimum Time Before This Meal—The minimum amount of time after the shift start time or the end of the previous meal before agents are allowed to take this meal. For example, agents might be required to work at least two hours before the meal. Enter the duration in the format hours:minutes. The time before a meal can include breaks.

Minimum Time After This Meal—The minimum amount of time between the meal and the shift end time or the beginning of the next meal. For example, agents might be required to work at least four hours after the meal. Enter the duration in the format hours:minutes. The time after a meal can include breaks.

Adding and Editing Breaks

Use the Break Properties window to define the rules for assigning breaks during a shift.

A shift can contain up to eight breaks.

To configure a break:

1. Click **Shifts** on the Modules pane and then select a specific shift on the Objects pane.
2. Click the Shift Items tab.
3. To add a new break, click **Add.** To edit an existing break, select it and then click **Edit.** The figure below shows an example Break (Edit) dialog box.

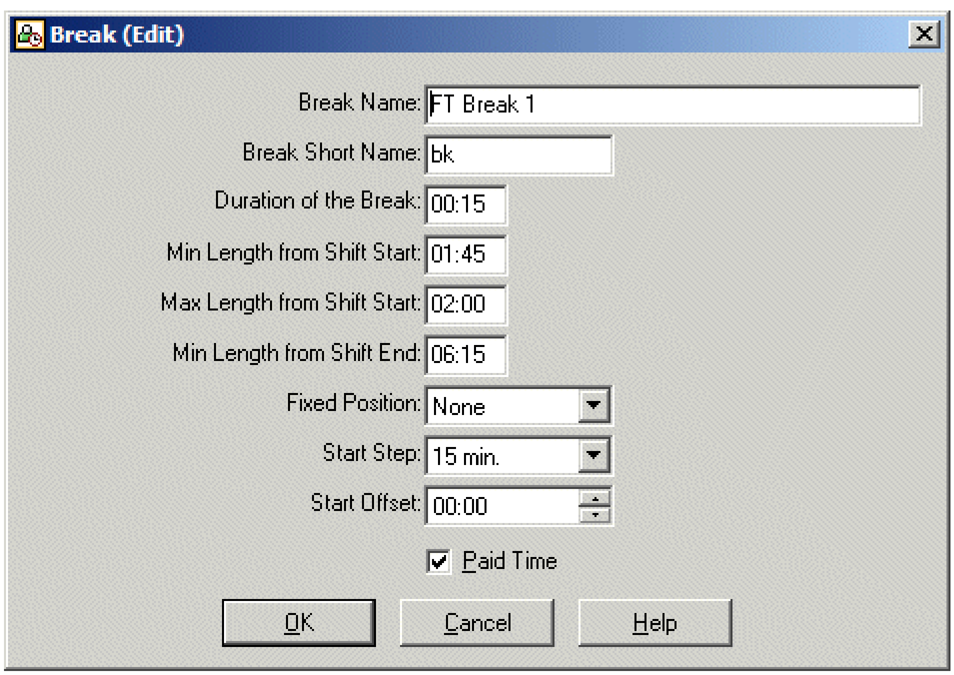

Figure 92: Break (Edit) dialog box

4. Enter or change settings for the break based on the properties definitions below.
5. Click **OK.**

Break Rules Properties

Break Name—The name of the break. Use names that clearly identify the break type. The break name must be unique within the site.

Break Short Name—Enter a short name of up to 6 characters (or 3 double-byte characters) to identify this break. The short name appears in schedule displays.

Duration of the Break—The duration of this break in one-minute increments, entered in hh:mm format.

Minimum Length from Shift Start—The minimum amount of time that must pass before an agent can start this break. Enter the duration in the format hours:minutes.

Maximum Length from Shift Start—The maximum amount of time that can pass before an agent starts this break. Enter the duration in the format hours:minutes.

Minimum Length from Shift End—The minimum amount of time that must pass after an agent returns to work from this break until the end of the shift. Enter the duration in the format hours:minutes.

Fixed Position—Determines whether the break has to occur at a specific point in the shift. Possible values are None, Start of Shift, and End of Shift.

Start Step—The increments between break start times. For example, with a start step of 15 minutes, agents leave for the break 15 minutes apart.

Start Offset—Sets how many minutes past the hour in the interval in which a break may occur that the start step calculation should begin. Use Start Offset to adjust the break start to a finer granularity than using only the start step alone. For example, if your Start Step is set to 15 and the Start Offset to 1, then breaks could start at 12:01AM, 12:16AM, 12:31AM, and so on. Enter values in hh:mm format.

Paid Time—When selected, the break is paid.

Exception Types

Exception types define periods of time when agents are engaged in nonwork activities, such as training or meetings. Each site configures its own set of exception types based on its business requirements.

Some Exception Type Characteristics

- When you delete an Exception Type that is used in a schedule (including the Master Schedule), the Exception Type remains in the schedule but its label changes to <Exception>*xx* (where *xx* is the ID number of the exception).
- You cannot delete or edit an exception type while it is being used in a calendar or in a meeting. However, you *can* change an exception type's Name or Short Name.
- You cannot edit or delete a Trade Rule. However, you can *change* which trade rule is associated with a specific Exception Type.

Using Time-Off Types Instead of Exception Types

The standard exception types that WFM creates when you choose the Generate Default Schedule State Groups and Exception Types while importing a site include several that represent various types of time off. *These exception types, and the Exception is Used as Time Off setting, are included for backwards compatibility only.*

For example, the standard exception types include Time Off, Holiday, Sick Day, and Personal Day. These time-off exception types are comparatively inflexible and cannot be associated with time-off accrual rules. For this reason, time-off types are the preferred way to configure the various kinds of time off periods you use.

- Genesys recommends that you configure all types of time off using the Time Off Types module rather than configuring them as exception types.

Note: Supervisors can also enter time-off as preferences in WFM Web's Calendar view.

Creating Partial-Day Exceptions

Scheduler evaluates partial-day exceptions are evaluated to see whether they are Valid or Invalid. Valid partial-day exceptions comply with the criteria listed in Exception Type Properties (below).

Partial-day exceptions must:

- Not conflict with a full-day exception or granted preference.
- Fall entirely within the agent's availability pattern as specified in the Contract module and (if applicable) within granted availability preference hours.
- Fall entirely within activity hours of operation for activities the agent can perform.

- Fall entirely within at least one compatible shift's start and end times and be compatible with the meal settings for that shift.
- Not overlap the start or end time for another part-day exception.

Adding and Editing Exception Types

You can create an entirely new exception type or create a new one by copying an pasting an existing exception type.

To create a new exception type:

1. Expand Policies on the Modules pane and click **Exception Types.**

2. Select and then right-click a site or an existing exception type on the Objects pane.

3. Select **New Exception Type** from the shortcut menu. When configuring a new exception type, the Data pane appears as shown below.

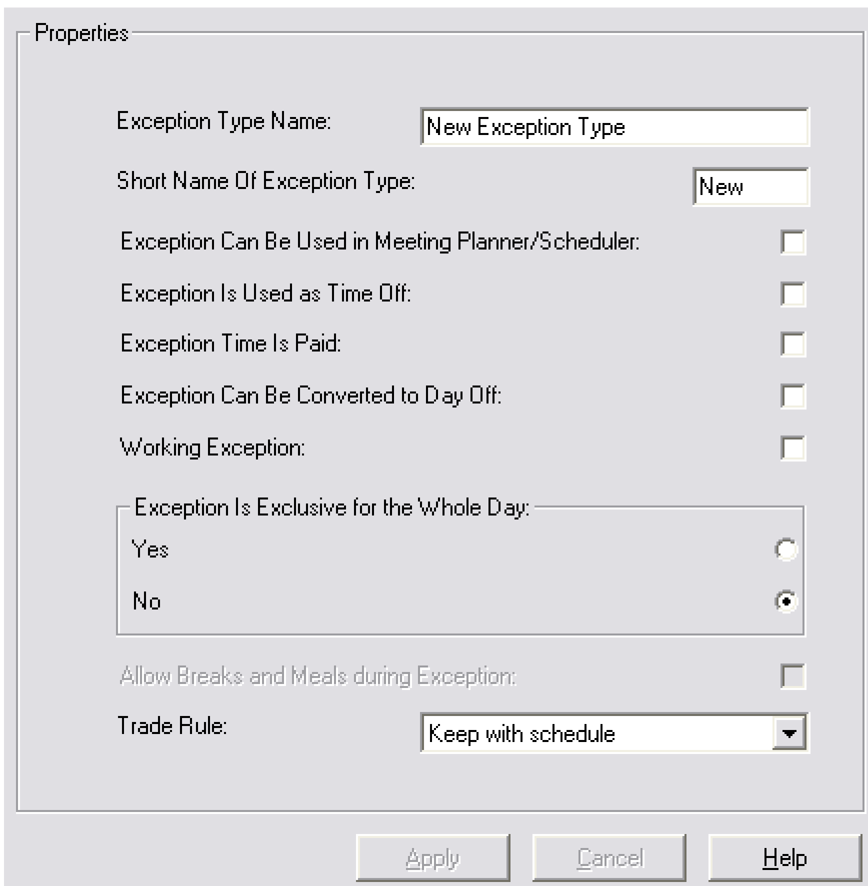

Figure 93: Data Pane, New Exception Type

To copy and paste an existing exception type:

1. Select an exception type.

2. Right-click it and then select **Copy Exception Type.**
3. Right-click a site or any existing exception type within that site and then select **Paste <*exception_type_name*> Copy.**

   Whichever method you use, the new exception type appears on the Objects pane with the default name *New Exception Type*.
4. Now configure the Exception Type settings. See Exception Type Properties for information on configuring the exception type.
5. Click **Apply** to save your changes or **Cancel** to restore the original settings.

To edit an exception type:

1. Select the Exception Type in the tree view.
2. Make the necessary changes. See Exception Type Properties for information on configuring these settings.
3. Click **Apply** to save your changes or **Cancel** to restore the original settings.

Note: You cannot edit exception types if they are being used in the Calendar or meeting Planner.

To delete an exception type:

1. Right-click the exception type in the tree view.
2. Click **Delete** in the shortcut menu.

Note: You cannot delete an exception type that is used in the Calendar or meeting Planner.

Exception Type Properties

Exception Type Name—Each exception type should have a descriptive name. The name must be unique within the site.

Exception Type Short Name—To be used in graphical representations of the exception in Calendar and Scheduler. Can be up to three characters.

Exception Can Be Used in Meeting Planner/Scheduler—Select this if the exception is a meeting or an exception that Meeting Planner or Meeting Scheduler can schedule.

Note: **Exception Is Used as Time Off**—Select this check box if the exception duration should be counted against the Time Off balance. Exception Used as Time Off does not utilize any other time-off rules and settings (including time off limits). The ability to use an exception as time off is for legacy purposes only, for customers who have previously created exceptions to use as partial-day time off. Genesys recommends that users set up time off types to use for both full-day and partial-day time off and no longer use exceptions to represent partial-day time off.

Exception Time Is Paid—If the check box is selected, the exception is paid. If clear, it is unpaid.

Exception Can Be Converted to Day Off—This is applicable for partial-day as well as full-day exceptions. If selected, it allows Scheduler to convert the exception to a day off if necessary for consistent scheduling. The day off can be paid or unpaid.

- **Full-Day Exceptions—**If you select Exception Can Be Converted to Day Off, Scheduler always converts the exception to a day off.
- **Partial-Day Exceptions—**If you select Exception Can Be Converted to Day Off and no shift was assigned for that day during the schedule build process, Scheduler assigns a day off.

Note: These days off are counted towards Preference Fulfillment.

Working Exception—Select this check box if this exception is working overhead. If checked, the exception is flagged as a working exception and used when calculating the % Working Exceptions column on the Actual Overhead Report.

Exception Is Exclusive for the Whole Day—Select **Yes** or **No.**

Allow Breaks during Exception—Select this check box to allow breaks during the currently selected Exception. Default setting: cleared.

Note: This option is disabled if the current combination of selected Exception properties does not allow breaks.

Trade Rule—Indicates how this exception should be treated if an agent assigned this exception is involved in a schedule trade. Possible values are Delete, Do Not Trade, Keep with Agent, and Keep with Schedule (default).

Agent Initiated—Select this check box to allow an Agent to initiate this Exception type. The default is: cleared.

Start Date—Select this check box to specify the start date of an allowed range for this exception type. Then enter the month, day, and year manually or click the down arrow to select the date from a drop-down calendar. The default is the current date.

End Date—Select this check box to specify the end date of an allowed range for this exception type. Then enter the month, day, and year manually or click the down arrow to select a date from the drop-down calendar. The default is the current date.

Notes: You can leave both of these fields unspecified to define the allowed range as unlimited.

You must specify both fields.

These controls are enabled only if you have selected the Agent Initiated check box.

Time-Off Types

Overview

WFM enables you to configure multiple types of time off. Examples of time off types include vacation, sick leave, paid time off, holiday, maternity leave, and so on.

By default, WFM creates the *Vacation* time-off type. This time-off type cannot be deleted and does not belong exclusively to any site.

For each type of time off, you configure one or more time-off rules. These rules tell WFM how each type of time off accumulates. See Time-Off Rules Overview for more information.

Note: You assign time-off type/time-off rule combinations to agents using either the Time Off Rule Assignments tab or the Agent Time Off tab.

Time-Off Types List

To see the time-off types configured for a site:

1. Select the Time Off Types module on the Modules pane.
2. Select the site on the Objects pane. The Time-Off Types list appears.

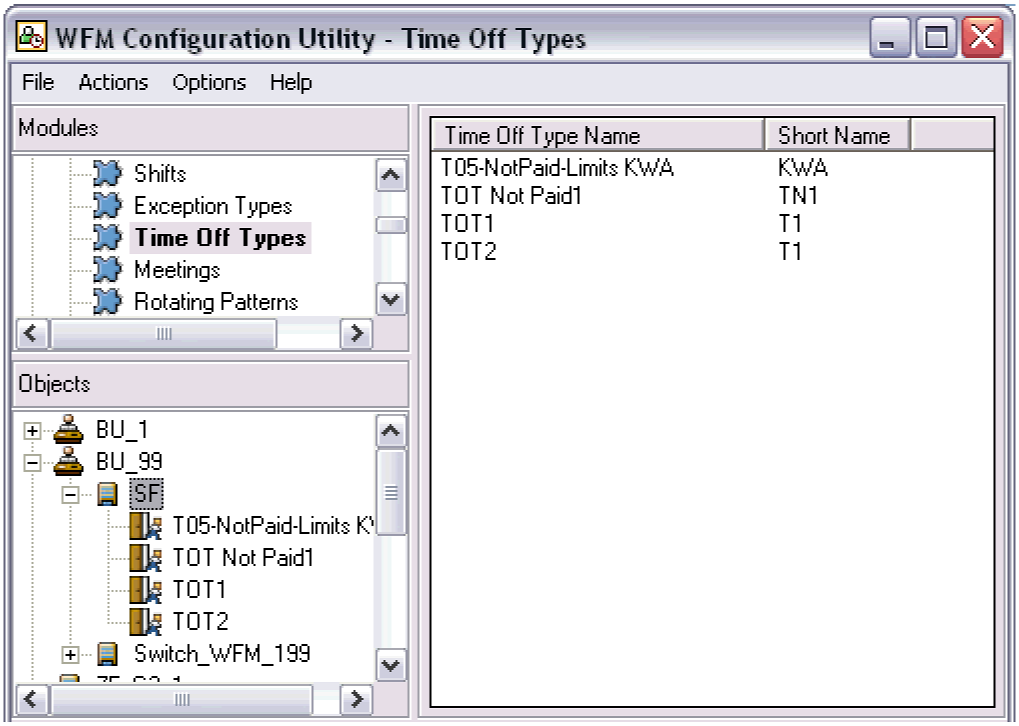

Figure 94: Time-Off Types list

The list shows the names and short names of each existing time-off type configured for the selected site.

You cannot add to or edit the list of time-off types directly. To edit an existing time-off type:

- Select the time-off type in the Time-Off Types list. The Properties dialog box for that time-off type opens.

Working with Time-Off Types

To add, edit, copy, or delete a time-off type:

1. Right-click the site to create a new time-off type. Or select a time-off type already configured for the site to edit, delete, or copy it.

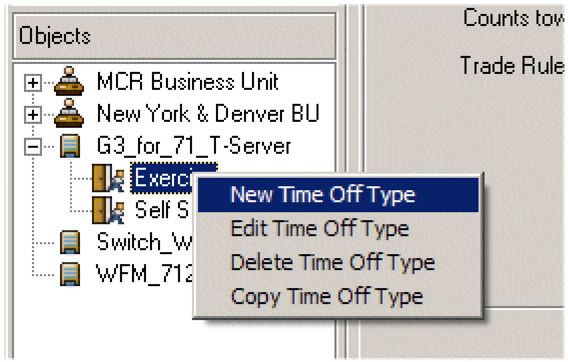

Figure 95: New Time Off Type

2. Select the appropriate command from the shortcut menu.
3. The next step depends on the command you selected:
    - New Time Off Type or Edit Time Off Type—Enter or change the settings for the time off type. For more information on configuring time-off types, see:
    - Time-Off Types Properties, which explains the settings on the Properties tab.
    - Time-Off Types Assignments, which explains how to assign time-off rules to your time-off types.
    - Delete Time Off Type—A confirmation message appears. If appropriate, click **Yes** when asked to confirm the deletion. Note that if you delete a time off type, all existing agents' time offs (with associated bonuses and time-off balances) for this time off type will be deleted.
      Note that the Delete Time Off Type command is disabled if the time-off type is present in the Calendar.
    - Copy Time Off Type—Right-click the site or any time-off type under the site and select **Paste <*time-off type name*> Copy.**
4. When you have finished, click **Apply** to save your changes or **Cancel** to discard them and return to the configuration existing at the time of the most recent save.

Time-Off Types Properties

When you create or select a time-off type, WFM displays the Time Off Types Properties tab.

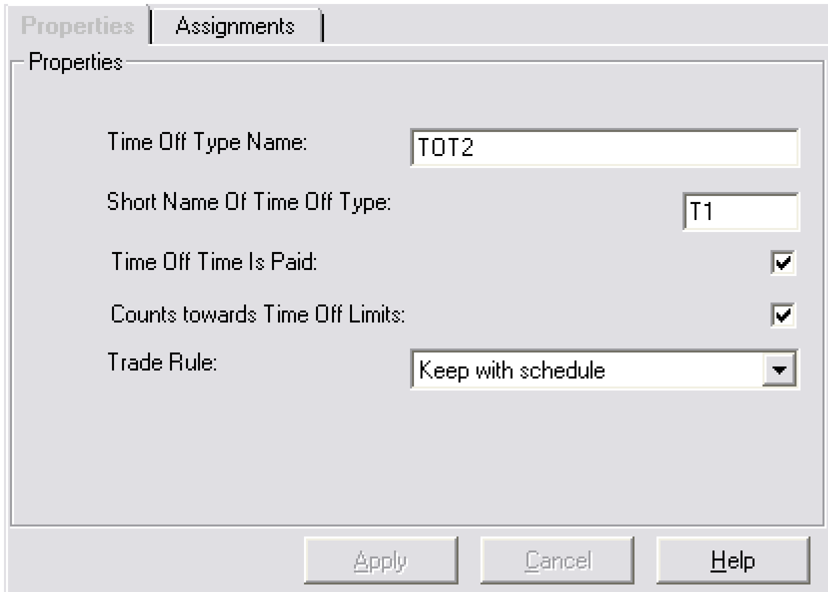

Figure 96: Time Off Types Properties tab

- To link time-off rules to the time-off type, use the Assignments tab.

Time-Off Type Properties

Time-Off Type Name—This name should be descriptive and must be unique within the site.

Short Name of Time-Off Type—This can be up to three characters. It must be unique within the site.

Time Off Time is Paid—Select this check box if the time-off type is paid.

- After a time-off type is used in the Calendar or in a schedule, you cannot change following fields: Time Off Time is Paid and Counts Toward Time Off Limits. Once a time-off type is used, these fields are grayed out; for example, after you assign a time off rule to an agent and then add it to an agent's schedule.

Counts Toward Time Off Limits—Select this check box if WFM should apply time-off hours of this type to the time-off limits you set in the WFM Web for Supervisors Calendar module.

Note: If you clear this check box, *no* time-off limits are applied to this time-off type.

Trade Rule—This controls whether agents can trade schedule periods that include time off of this type. For example, a paid-time-off day normally stays with the agent, whereas training may stay with the schedule (any agent working that shift would attend that training). The default value is Keep with Schedule.

Time Off Types Assignments

When you create or select a time-off type, the Properties tab appears.

To link time-off types with time-off rules:

1. Click the Assignments tab.

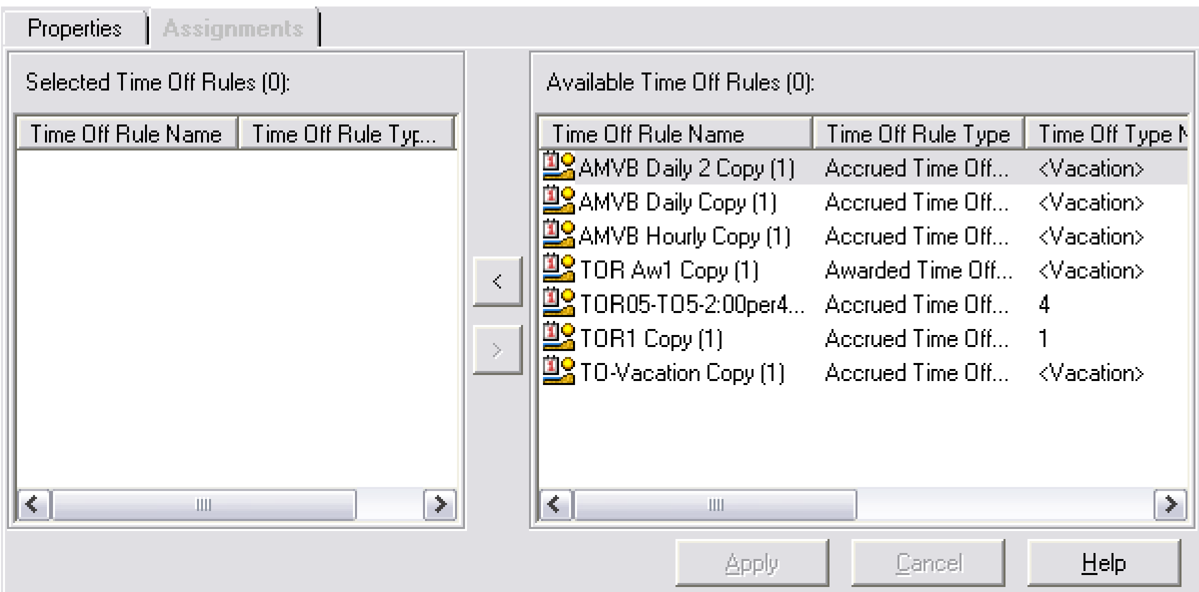

Figure 97: Time Off Types, Assignments tab

Assigning Time-Off Rules

The Assignments tab has two lists:

- Available Time Off Rules lists the time-off rules configured for the site.
- Selected Time Off Rules lists the time-off rules associated with the selected time-off type.

Note: You must create time-off rules for this site before you can make assignments.

To assign or remove time-off rules from the time-off type:

1. Select the rule or rules to be assigned or removed.

Note: Moving a Selected time-off rule to the Available list unassigns the rule from the time-off type.

2. Click the arrow pointing toward the list to which you want to move the rules.
3. Click **Apply** to save your changes or **Cancel** to discard them and return to the settings that existing at the most recent save.

Meetings

Overview

Use the Meetings module to create, edit, delete, or assign attendees to meetings.

Planner vs. Scheduler

Use the **Meeting Planner** in WFM Configuration Utility to configure meetings that you know about in advance. It is especially useful for recurring team meetings or coaching sessions. Meetings created in the Meeting Planner are taken as inputs during schedule building.

Use the **Meeting Scheduler** in WFM Web Supervisor to create ad hoc meetings in a schedule that has already been built. Access the Meeting Scheduler feature from within the Intra-day Schedule view or Agent-Extended Schedule view, in WFM Web Supervisor.

These features are described in these topics:

“New Meeting Attributes” on page 193—Explains how to create new meetings and how to open the edit window for existing ones.

“Meeting General Properties” on page 195—Describes the settings you use to configure meetings.

“Adding Meeting Participants” on page 196—Explains how to choose the agents you want to be assigned to a meeting.

New Meeting Attributes

You can create an entirely new meeting or create a new one by copying an pasting an existing meeting.

To create a new meeting:

1. Expand Policies on the Modules pane and click **Meetings.**
2. Select and then right-click a site or an existing meeting on the Objects pane.
3. Select **New Meeting** from the shortcut menu.

The New Meeting Attribute dialog box opens.

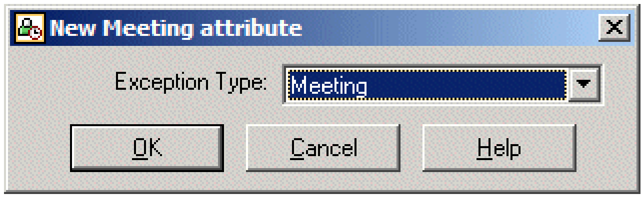

Figure 98: New Meeting Attribute dialog box

4. Select the exception type for the new meeting. Only exception types for that site that are configured as able to be used in Meeting Planner appear. See Exception Types for information on exception type configuration.
5. Click **Yes.**

The new meeting appears under the site in the tree view with the default name *New Meeting*.

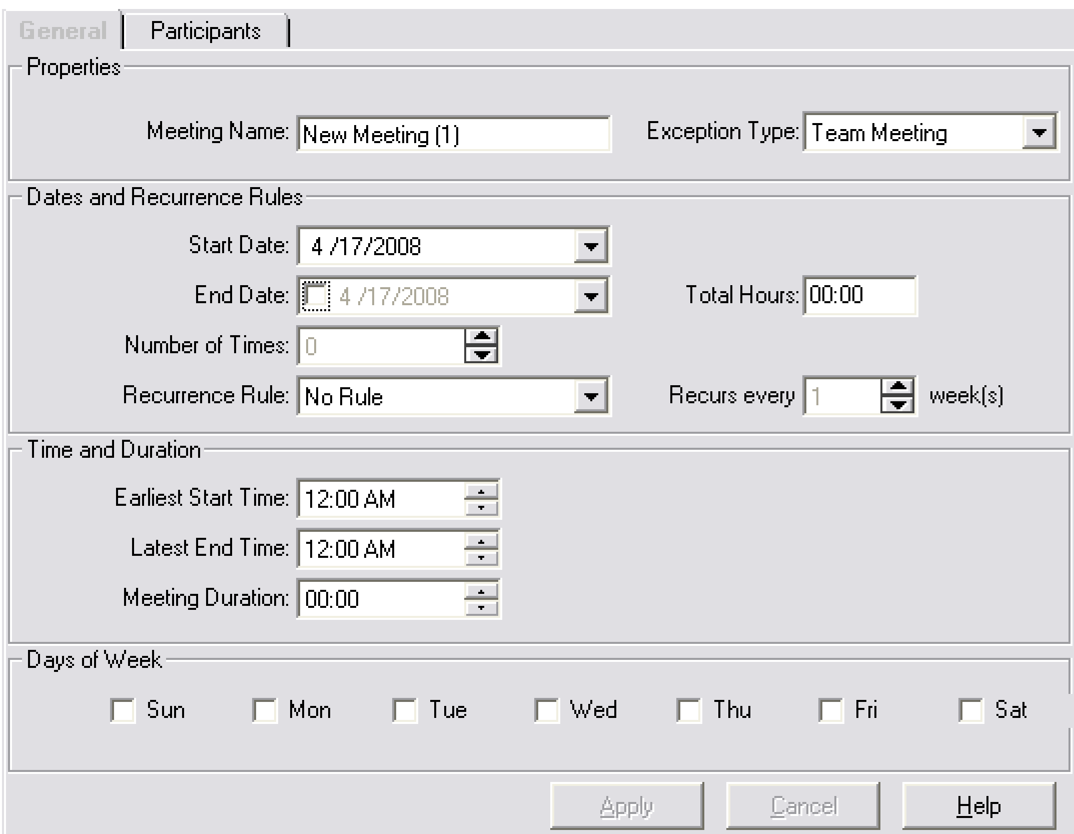

Figure 99: New Meeting, General tab

For help with configuration of your new meeting, see Meeting General Properties.

Creating a New Meeting by Copying an Existing Meeting

To create a new meeting by copying an existing meeting:

1. Create a new meeting.
2. Right-click an existing meeting in the tree view and select **Copy Meeting** from the shortcut menu.
3. Right-click your new meeting and select **Paste <*meeting_name*> Copy** from the shortcut menu.

Note: You can only copy a meeting from a site to the same site. You cannot copy a meeting to a different site.

All meeting attributes, including attendees, are copied.

Meeting General Properties

The available settings for configuring meetings are described below.

- For instructions on creating or editing a meeting, see New Meeting Attributes.
- For instructions on adding attendees to meetings, see Adding Meeting Participants.

Meeting Properties

The figure below shows the General tab.

Meeting Name—The name of this meeting, for example, *Sales Meeting* or *Monthly Review*. The name must be unique within the site.

Exception Type—You can base a meeting on any exception type that is configured for the current site and that has the Exception Can be Used in Meeting Planner option selected. Use the Exception Type Properties window to set this option. See Exception Types for details.

Date and Recurrence Rules

Start Date—The earliest date on which Scheduler can schedule the meeting. Enter values by typing in a date or by using the drop-down calendar.

End Date—The latest date on which Scheduler can assign the meeting. Select the check box to indicate that there should be a specified end date. If you clear the check box, then the end date is automatically calculated based on the recurrence rules settings you enter. Enter values by typing in a date or by using the drop-down calendar.

Note: You must set either Number of Times or End Date. You cannot set both.

Total Hours—The total meeting hours. When you specify this optional parameter, Scheduler creates as many meetings as necessary with the defined duration to satisfy the Total Hours requirement.

Number of Times—If you select Daily or Weekly for the Type, set a value for the number of consecutive days or weeks on which this meeting should be scheduled. If you have set an end date, WFM automatically sets this value to 0.For example, if the meeting duration is set to two hours, and the Total Hours is set to six hours, then Scheduler generates three 2-hour meetings. Scheduler can assign these meetings consecutively.

Recurrence Rule—No Rule, Daily, Weekly, or Monthly. The default value is No Rule.

Recurs Every—If the Recurrence Rule is set to Weekly, you can set a value in this field that defines how often the meeting should recur. Examples: 1=every week, 2=every other week, 3=every third week.

Time and Duration

Earliest Start Time—A proposed time at which Scheduler can assign the meeting to start.

Latest End Time—A proposed time at which Scheduler can assign the meeting to end.

Meeting Duration—The length of time Scheduler should allot for the meeting.

Days of Week—The days of the week on which Scheduler can assign this meeting.

Adding Meeting Participants

Select meeting participants from the list of available agents on the Participants tab.

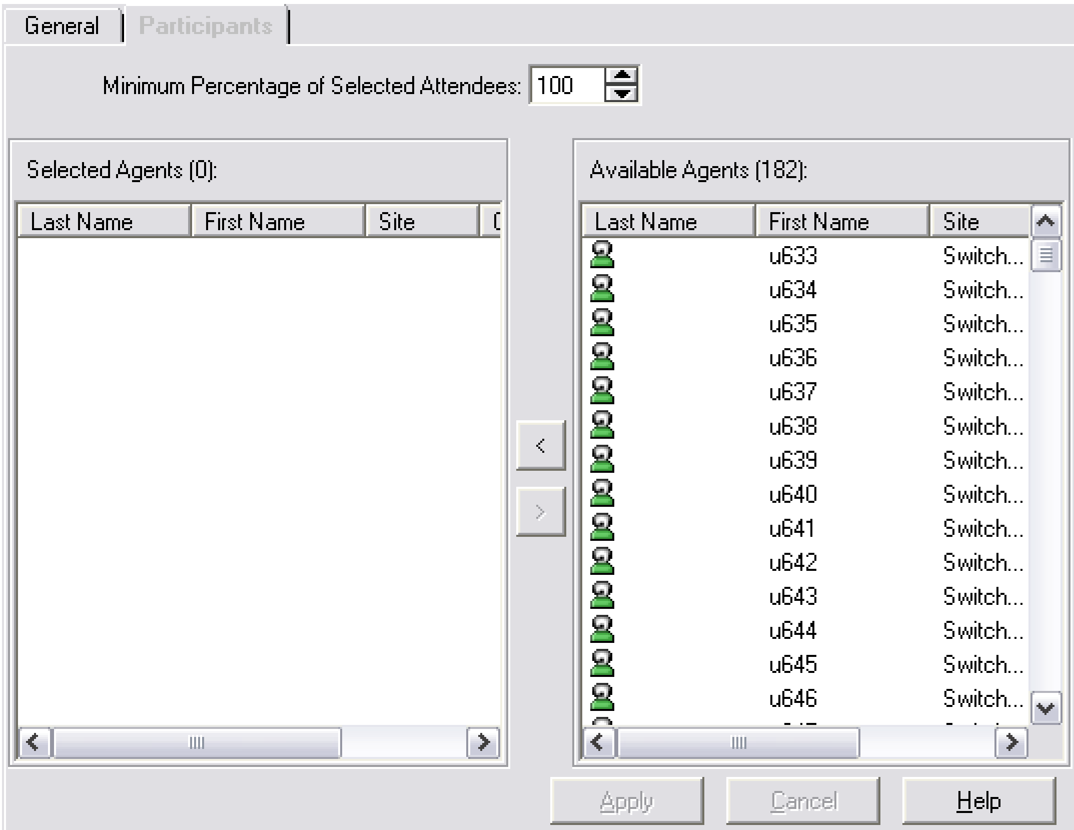

Figure 100: New Meeting, Participants tab

Only agents from the meeting site are available for selection.

To add agents to a meeting:

1. Enter or select a value for Minimum Percentage of Selected Attendees.

This value indicates what percentage of the agents you select must be available before WFM can schedule a meeting. You can enter any value from 0–100. The default value is 100 percent.

Note that the value 0 is interpreted as 100 percent to accommodate data that was migrated from WFM 6.5, because that version did not include the variable Minimum Percentage of Selected Attendees in its database.

2. Select agents on the Available Agents pane.

3. Click the < button. This moves the agents to the Selected Agents pane.

To remove agents from the meeting, select them and click > to move them to the Available Agents pane.

4. Click **Apply.**

When a schedule that includes the meeting time is generated, Scheduler verifies that enough agents are available to satisfy the Minimum Percentage requirement and then assigns the meeting exception to the available agents. If too few agents are available, Scheduler generates an error message and does not schedule the meeting.

To sort agents:

1. Click the header of the column by which you want to sort the list.

Rotating Patterns

Overview

Rotating Patterns are rotating work weeks of shifts, working days, working hours, and/or work activities. A rotating pattern can be assigned to an agent or a team.

For example, a regular weekly pattern might be Monday through Friday from 9:00 AM to 5:00 PM followed by a short weekly pattern of Tuesday through Thursday from 12:00 PM to 4:00 PM.

Another example: Agents that work four 10-hour days per week could work Monday through Thursday one week and Tuesday through Friday the next week. The combination of these alternate days off (Fridays or Mondays) comprises a rotating pattern. The figure below shows an example Rotating Pattern Properties tab after configuring the rotating work weeks in the Weekly Pattern window.

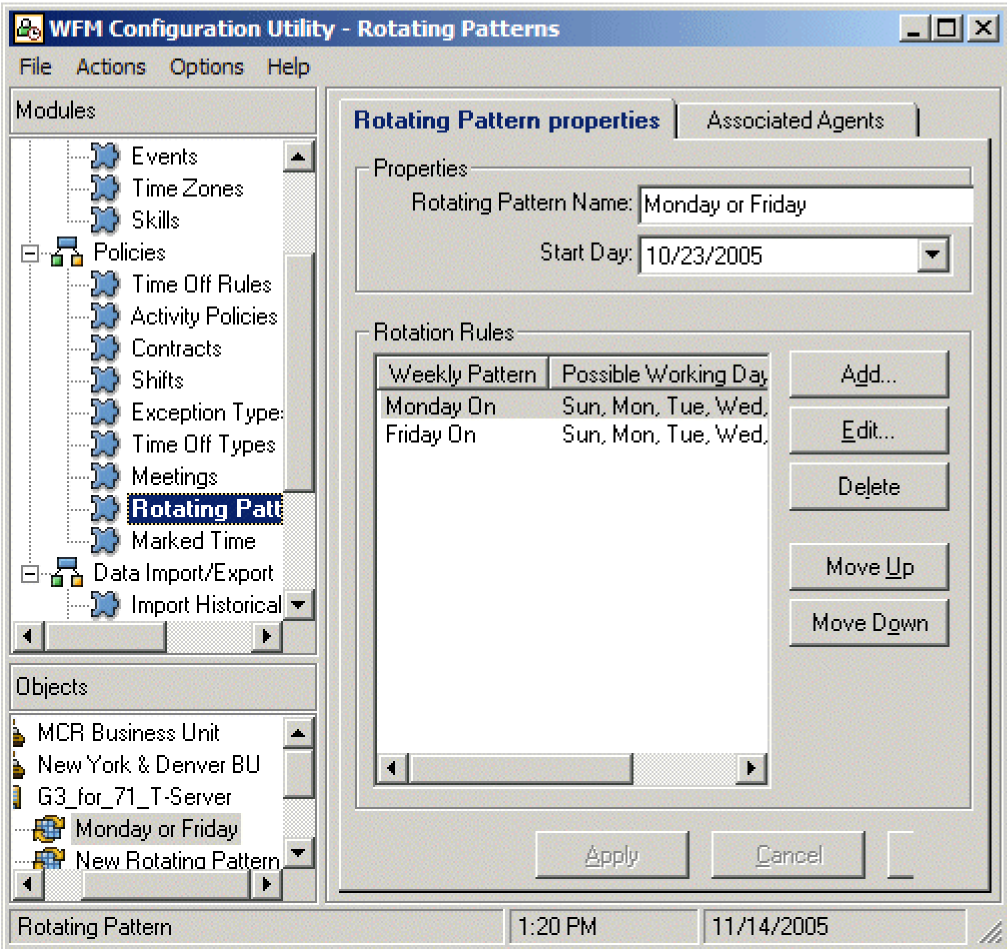

Figure 101: Rotating Pattern Properties tab

In the Weekly Pattern window, the Monday On Rotation Rule listed above might look like this:

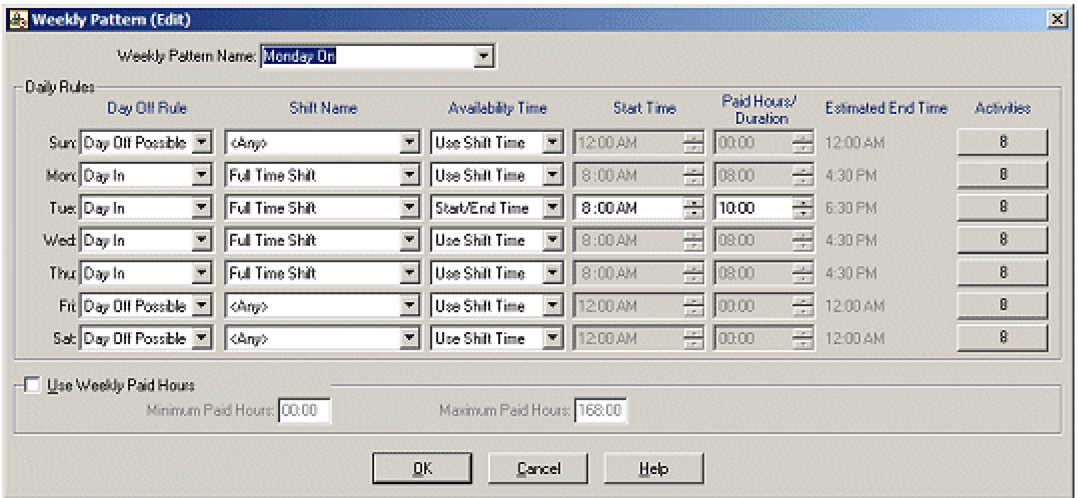

Figure 102: Monday On Rotation Rule

The Friday On Rotation Rule might look like this:

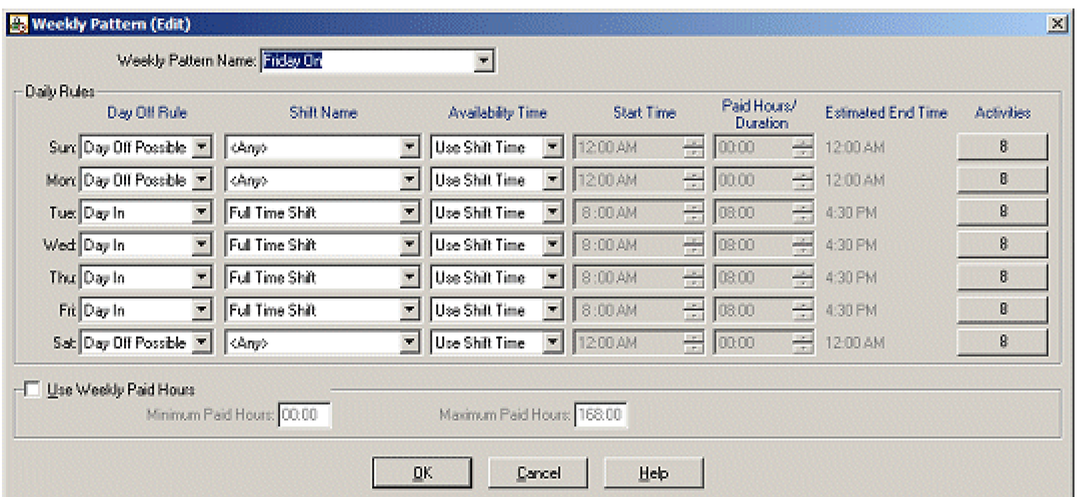

Figure 103: Friday On Rotation Rule

From the Rotating Pattern Properties tab you can open the Weekly Pattern window shown above, which enables you to create weekly patterns. You can then combine these weekly patterns to create rotating patterns. Because you configure rotating patterns by the week, you can have as many weekly rotations as you need.

Use the Rotating Patterns module to:

- View, create, edit, or delete rotating patterns.
- Create and edit weekly patterns.

- Assign activities to rotating patterns.
- Associate agents with rotating patterns.

Creating Rotating Patterns

To create a rotating pattern:

1. Click **Rotating Patterns** on the Modules pane and then right-click a site or an existing rotating pattern.
2. Select **New Rotating Pattern** from the shortcut menu.

   The Rotating Pattern Properties window opens, showing the new rotating pattern with the default name *New Rotating Pattern*.

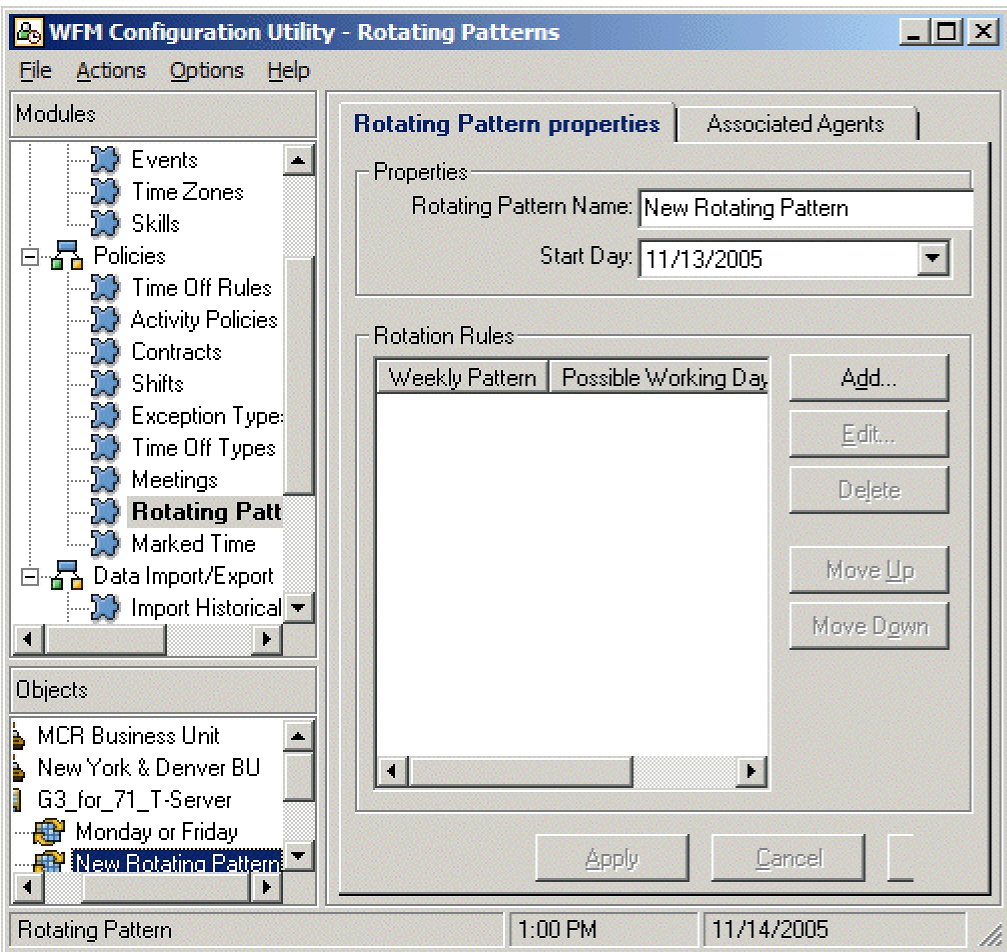

Figure 104: Rotating Pattern Properties tab

3. Enter a name and start date for the new pattern.
4. Click **Add** to create a weekly pattern for each type of workweek covered by the rotating pattern. The Weekly Pattern dialog box opens.

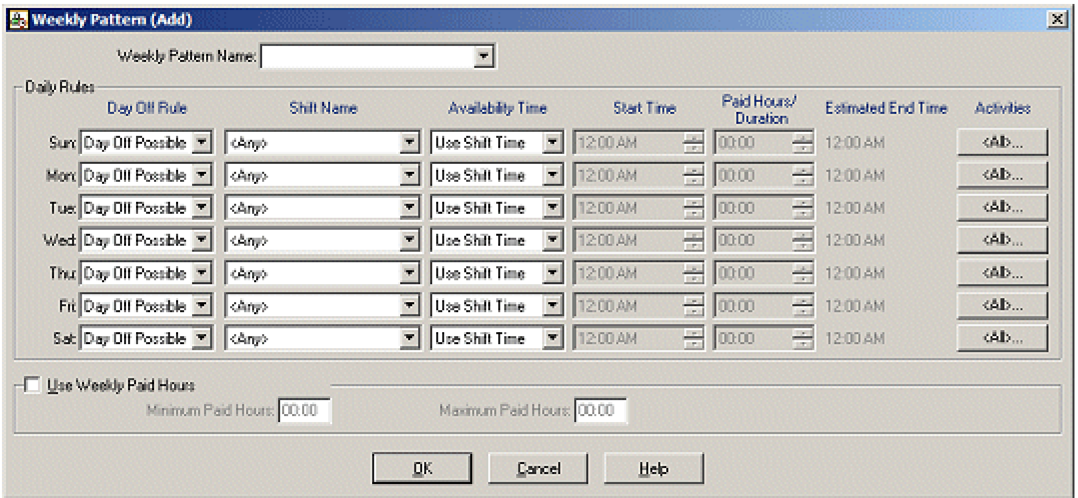

Figure 105: Weekly Pattern dialog box

5. Configure the rotating pattern. Use the descriptions of the settings below to guide you.
6. Assign the rotating pattern to agents on the Associated Agents tab.
7. Click **Apply.**

You can edit weekly patterns and rotating patterns after you have created them.

To create a rotating pattern using copy and paste:

1. Select a rotating pattern.
2. Right-click it and then select **Copy Rotating Pattern.**
3. Right-click a site or any existing rotating pattern within that site and then select **Paste <*rotating pattern name*> Copy**.

The new rotating pattern appears on the Objects pane with the default name <*rotating pattern name*> Copy (1). Configure the rotating pattern, using the descriptions of the settings below as a guide.

Rotating Patterns Settings

The Rotating Pattern Properties tab contains the following fields:

Rotating Pattern Name—The name of the selected rotating pattern. Use a name, such as Full-Time Rotation, that identifies the pattern type.

Start Day—The date on which this pattern begins. It must be the first day of the week (the WeekStartDay).

Rotation Rules—The weekly patterns that make up the current rotating pattern.

Add—Used to add weekly patterns to the rotating pattern.

Edit—Edits a weekly pattern that has been placed in the rotating pattern.

Delete—Removes the selected weekly pattern(s) from the rotating pattern.

Move Up—Moves the selected weekly pattern up in the list of weekly patterns that are included in the rotating pattern.

Move Down—Moves the selected weekly pattern down in the list of weekly patterns that are included in the rotating pattern.

Apply and **Cancel—Apply** saves changes made in this window to the database. **Cancel** discards changes not yet saved to the database. No changes are final until you click **Apply.**

To edit a Rotating Pattern:

1. Select the rotating pattern in the tree view.
2. Make the changes you want by adding or editing weekly patterns, changing the weekly pattern sequence, or deleting weekly patterns.
3. Click **Apply.**

To edit a Weekly Pattern:

1. Select a weekly pattern from the list in the Rotation Rules pane.
2. Click **Edit.**

   The Weekly Pattern (Edit) window opens, displaying the values for the selected weekly pattern.
3. Make changes to the weekly pattern.
4. Click **OK.**

   The Rotating Pattern window opens again.
5. Click **Apply.**

Creating and Editing Weekly Patterns

Clicking **Add** or **Edit** on the Rotating Pattern Properties tab opens the Weekly Pattern dialog box.

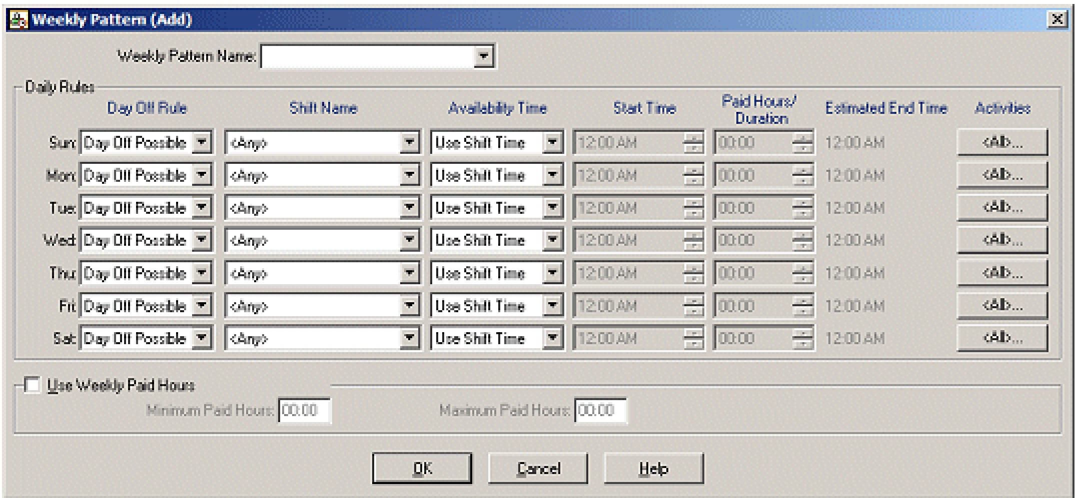

Figure 106: Weekly Pattern dialog box

See Configuring a Weekly Pattern (below) for instructions.

A *weekly pattern* is a sequence of days, each having its own shift, start time, and duration settings. Rotating patterns are composed of a sequence of weekly patterns.

Note: Rotating patterns must begin on the first day of the week and cannot overlap each other.

Rotation Types

By combining the possible settings in the Weekly Pattern window, you can create nine different types of rotation days:

Day Off—The agent must be assigned a day off on this day.

Any Shift—The agent can receive any compatible shift or a day off. In effect, the rotating pattern does not impose limitations on Scheduler for this day.

Availability—The agent can receive any shift that falls within the specified earliest start time and has the correct number of paid hours. Scheduler also has the option to assign a day off.

Flexible Shift—The agent must be assigned the specified shift, but the start time and paid hours are flexible within the limits of the shift configuration. Scheduler also has the option to assign a day off for this day.

Fixed Shift—The agent must be assigned the specified shift with the exact start time and number of paid hours that are specified. Scheduler also has the option to assign a day off for this day.

Granted Fixed Shift—The agent must be assigned the specified shift with the exact start time and number of paid hours that are specified. Scheduler *cannot* assign a day off for this day.

Granted Flexible Shift—The agent must be assigned the specified shift. The start time and number of paid hours can be adjusted by Scheduler. Scheduler *cannot* assign a day off for this day.

Granted Availability—The agent must be assigned a shift that falls within the specified earliest start time and has the correct number of paid hours. Scheduler *cannot* assign a day off for this day.

Granted Any Shift—The agent must be assigned a shift on this day. Scheduler *cannot* assign a day off for this day.

You can create a weekly pattern using any combination of these rotation types, as long as the combination does not conflict with paid hours and working days constraints.

Note: In the case of the Fixed Shift type, Scheduler can assign a shorter shift than specified in the rotating pattern configuration if the agent has requested a number of preferences for the scheduling period. This happens because Scheduler treats this rotation type as a preference.

Configure a Weekly Pattern

To configure a weekly pattern:

See Weekly Pattern Settings for descriptions of each field you need to configure.

1. Enter a name for the new weekly pattern or select a previously created weekly pattern from the drop-down list. The name must be unique within rotating pattern.

   Note: Selecting a previously created weekly pattern creates a new copy of it. You can edit the copy without affecting the original version.

2. Select a day-off rule for each day from the Day Off Rule drop-down menus.
3. For each day, select a shift name from the drop-down list.
4. Set the availability from the Availability Time drop-down menus.
5. Configure the shift start time and paid hours.

   This generates a non-editable estimated end time. The actual end time depends on whether any unpaid time is included in the schedule.

6. Click the button in the Activities column to select the activities that agents who are assigned this rotating pattern will perform. All activities are selected by default. See Rotating Pattern Activity Selection for information on this procedure.

   If all activities are cleared, the shift setting changes to <Any> and the activity button label to Day Off.

7. Click **OK.**

Weekly Pattern Settings

Weekly Pattern Name—The name of the new weekly pattern. Names should reflect the rotation that is being used, for example, *Full-Time Week1*. The name must be unique within the rotating pattern.

The Weekly Pattern Name drop-down box contains a list of all previously configured weekly patterns.

Select any previously configured weekly pattern to create a copy of the selected pattern. You can either use the copy as it was configured or modify it. Your changes do not affect the already created weekly pattern.

Day Off Rule—The rules that determine whether a day off can be assigned for that day. The possible rules are:

- Day In (a granted shift, granted any shift, or granted availability)
- Day Off Possible (the day can be a working day or a day off depending on which provides the most optimal schedule)
- Day Off (the day must be a day off).

Shift Name—The Shift to be used for a particular day in the weekly pattern.

Availability Time—Sets the window of time during which agents can work. This sets the outer limits for the shift start and end times.

Start Time—The start time for each day of the week.

Paid Hours/Duration—If you select a specific shift, this value is the number of paid hours in the shift. In this case, the value does not include unpaid breaks or meals.

If you select the Any option, this value indicates the number of paid hours that the shift will include plus any unpaid breaks or meals that are included in the shift.

Estimated End Time—A non-configurable field that shows, based on the settings you configured, what the end time would be for each day of the weekly pattern with all unpaid exceptions included.

Activities—The Activities button displays the Fixed Activities window. If you select no activities, this option is set to Day Off.

Use Weekly Paid Hours—Click to enable Minimum and Maximum Paid Hours.

- **Minimum Paid Hours**—The minimum number of hours defined for this pattern, entered in hh:mm format. If this constraint is set, WFM will schedule the agent to work at least this many hours for this particular week of the Schedule Planning Period. Valid values are 00:00 to 168:00. This value must be less than or equal to the Maximum Weekly Paid Hours setting in any associated contract. Must include all paid breaks and meals.
- **Maximum Paid Hours**—The maximum number of hours defined for this pattern, entered in hh:mm format. If this constraint is set, WFM will schedule the agent to work no more than this many hours for this particular week of the Schedule Planning Period. Valid values are 00:01 to 168:00. This value must be greater than or equal to the Minimum Weekly Paid Hours setting in any associated contract. Must include all paid breaks and meals.

Rotating Pattern Activity Selection

Use the Rotating Pattern Activities window to select the activities that agents who are assigned this rotating pattern will perform. By default, all activities are selected.

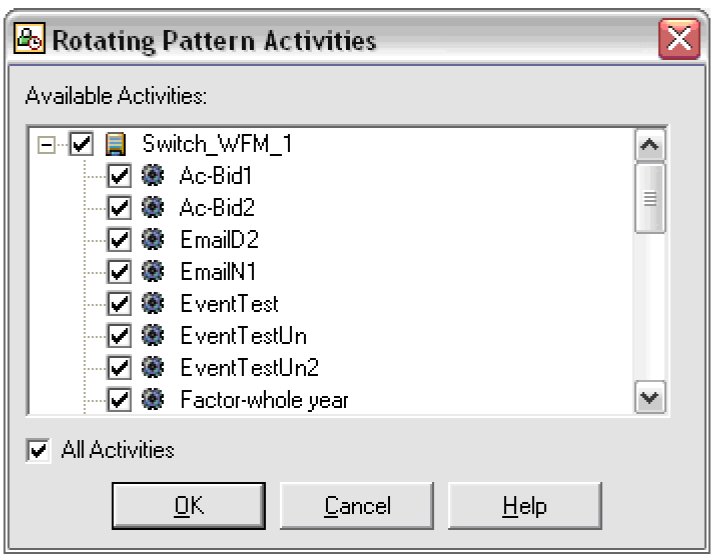

Figure 107: Available Rotating Pattern Activities

1. Select the check boxes for activities that should be included in the weekly pattern. Clear the check boxes for those you do not want included.

   To select all activities, select the check box next to the site to which this rotating pattern belongs.

Note: Agents must have the skills necessary to perform at least one of the activities included in a weekly pattern assigned to them.

2. Select the **All Activities** check box to select all activities in the list. This is not the same functionality as selecting the check box to the left of site name:
   - When the check box is selected, new activities that are created under the same site are checked and assigned automatically. Also, the Activities column of the Rotating Pattern Properties Report displays “All Applicable” in the row that corresponds to this rotating pattern.
   - When the check box is cleared, all existing activities remain selected, but any new activities that are created under the same site are not checked and assigned automatically.
   - Clearing one or more activities does clear the All Activities check box, and, after you close the Rotating Activities dialog box, causes the Activities column of the Weekly Pattern (Add) dialog box to display the exact number of selected activities. See the 18 button in the partial screen shot below, which indicates that only 18 of the 24 activities were selected.

Figure 108: Activities column of the Weekly Pattern (Add) dialog box

3. Click **OK** when your activity selection is correct.

Associating Teams with a Rotating Pattern

Use the Organization configuration window to select which teams are associated with a rotating pattern.

1. Select **Organization** on the Modules pane.
2. Select a site on the Objects pane.
3. Select a team.
4. Click **Rotating Pattern**. The Team's Rotating Pattern dialog box opens.

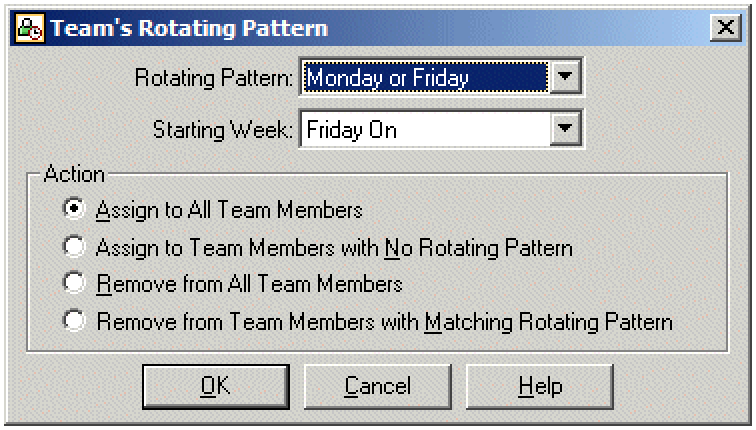

Figure 109: Team's Rotating Pattern dialog box

5. Complete the dialog box.
6. Click **OK**.

Marked Time

Use *marked time* to identify periods that WFM should track and display that are not already accounted for.

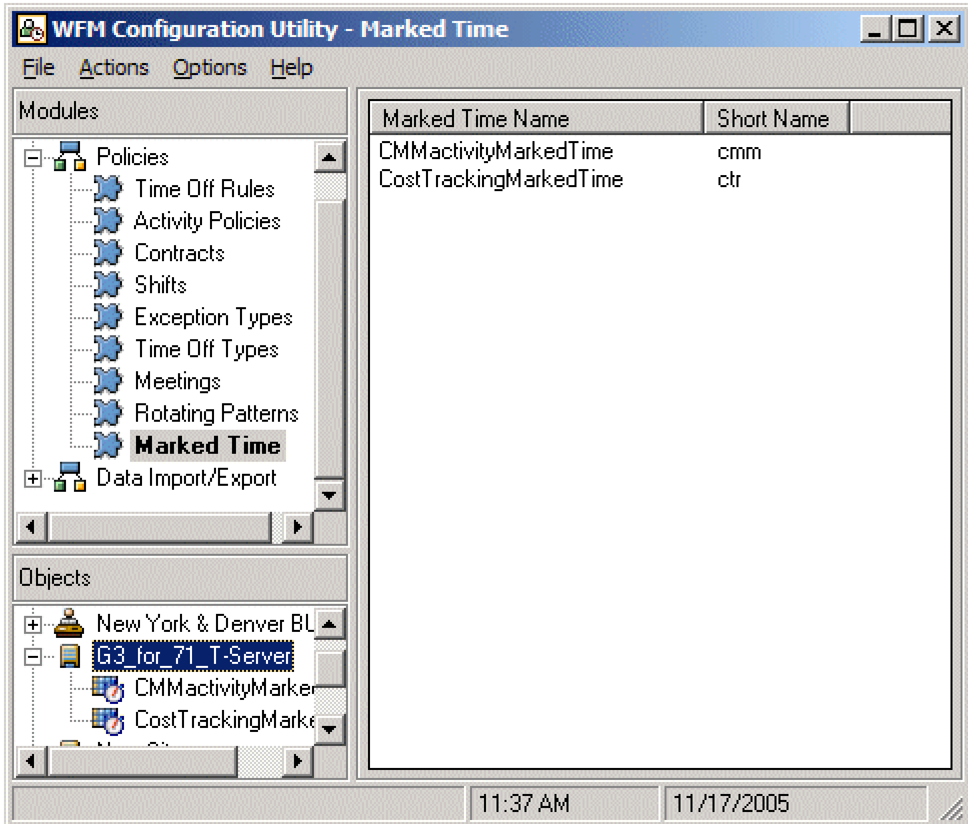

Figure 110: Marked Time Types for a Site

For example, some agents might each work a number of hours on an issue involving one account. By using marked time, you can designate that those hours spent working on that issue be displayed in the WFM Web for Supervisors schedule module and reported on, using the Schedule Marked Time and Schedule Marked Time Totals Reports generated in the WFM Web for Supervisors Reports module.

Creating a New Marked-Time Type

To create a new Marked-Time Type:

1. Select the Marked Time module on the Modules pane.
2. Right-click a site or existing marked-time type on the Objects pane.
3. Enter a name and short name for the marked-time type.
4. Click **Apply.** The figure below shows an example completed Data pane.

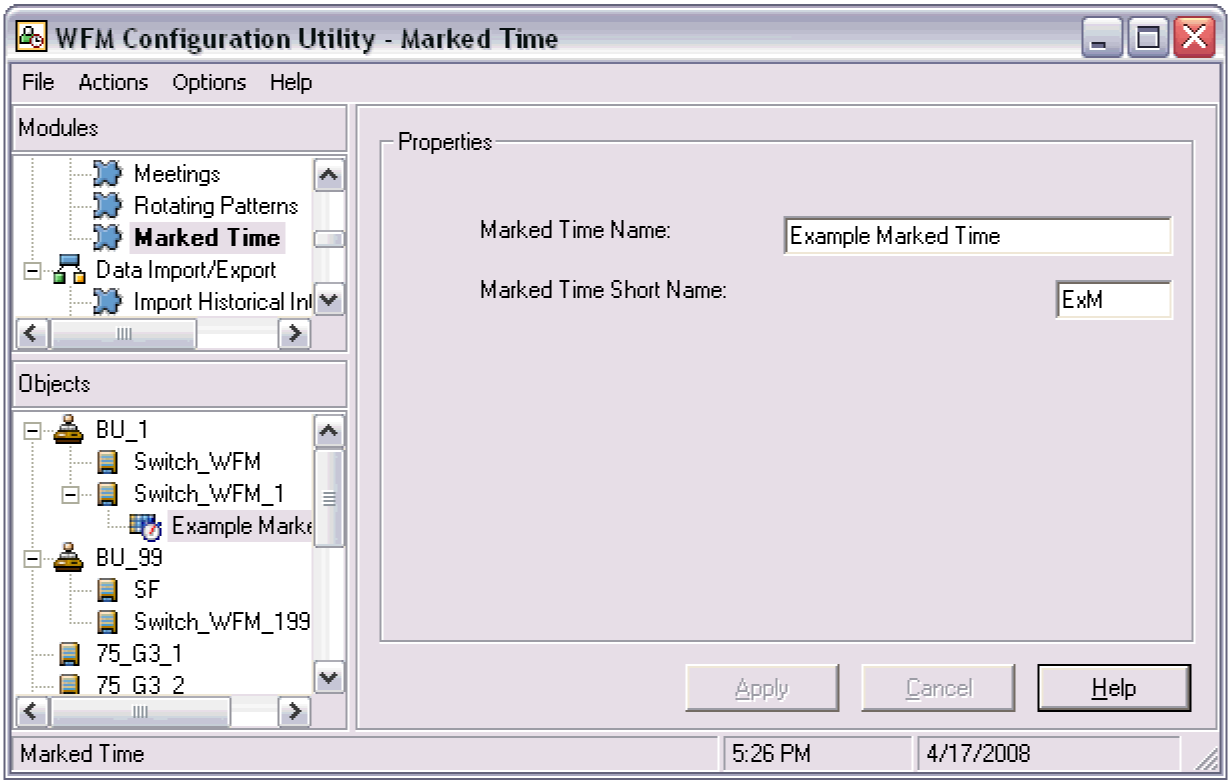

Figure 111: Data Pane, New Marked Time

Creating, Editing, Deleting, or Copying Marked-Time Types

1. Select the Marked Time module on the Modules pane.
2. Right-click an existing marked-time type on the Objects pane.
3. The next step depends on the command you selected:
   - New Marked Time or Edit Marked Time—Enter or change the settings for the marked-time type.
   - Delete Marked Time—Click **Yes** when asked to confirm the deletion.
   - Copy Marked Time—Right-click the site or any marked-time type under the site and select **Paste <*marked time name*> Copy.**
4. When you have finished, click **Apply** to save your changes or **Cancel** to discard them and return to the configuration existing at the time of the most recent save.

Chapter

4 Data Import / Export

This chapter covers the following topics:

Overview

When it is operating in fully automatic mode with Data Aggregator running in the background, Data Aggregator collects historical data automatically.

As an alternative, you can import historical data manually. For example, you may have a new Genesys WFM installation and want to import previously collected historical data.

You can export both forecasts you create using WFM and historical data collected by WFM.

Note: Historical data imported into Data Importer must be formatted into comma-delimited text files (.CSV format) containing three fields: date, time, and number of interactions handled. This file must:

- Be formatted according to regional settings.
- Use 15-, 30-, or 60-minute timesteps.
- Be ordered in ascending order by date.

Sample .CSV entries:

```
8/16/05, 0:00, 10
8/16/05, 0:15, 10
8/16/05, 0:30, 10
```

Use the Data Import/Export module to:

- Import historical interaction volume data

- Import historical AHT data
- Export interaction volume forecast
- Export AHT forecast
- Export Staffing forecast
- Export historical interaction volume
- Export historical AHT

Import or Export Historical Data

To import or export historical interaction volume or AHT data or to export forecast data or historical data:

1. Expand the Data Import/Export module on the Modules pane.

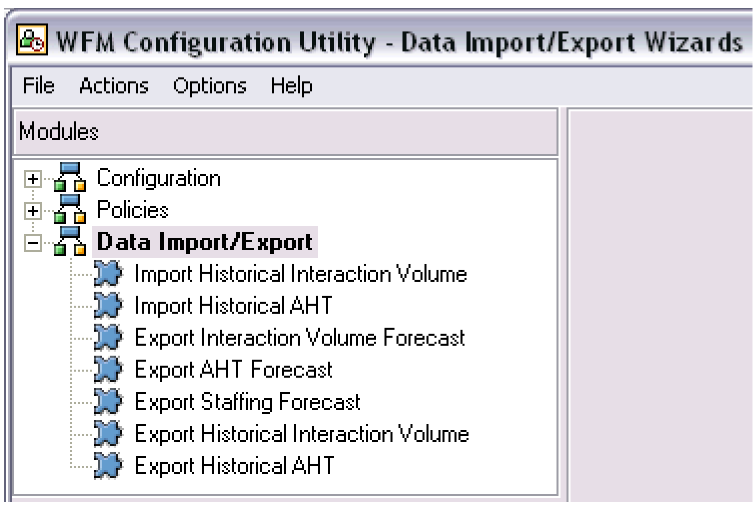

Figure 112: Data Import/Export module

2. Select the action you want to perform.
3. Expand the appropriate site or business unit and choose the activity for which you want to import or export data.
4. Click **Browse** to locate the .CSV file that contains the data you want imported or to which the data should be exported or enter the path to the file.
5. If you are importing historical data, select whether to overwrite or update existing data.

   If you select the Override radio button, then *all* historical data for the selected period is deleted and replaced with the new data.

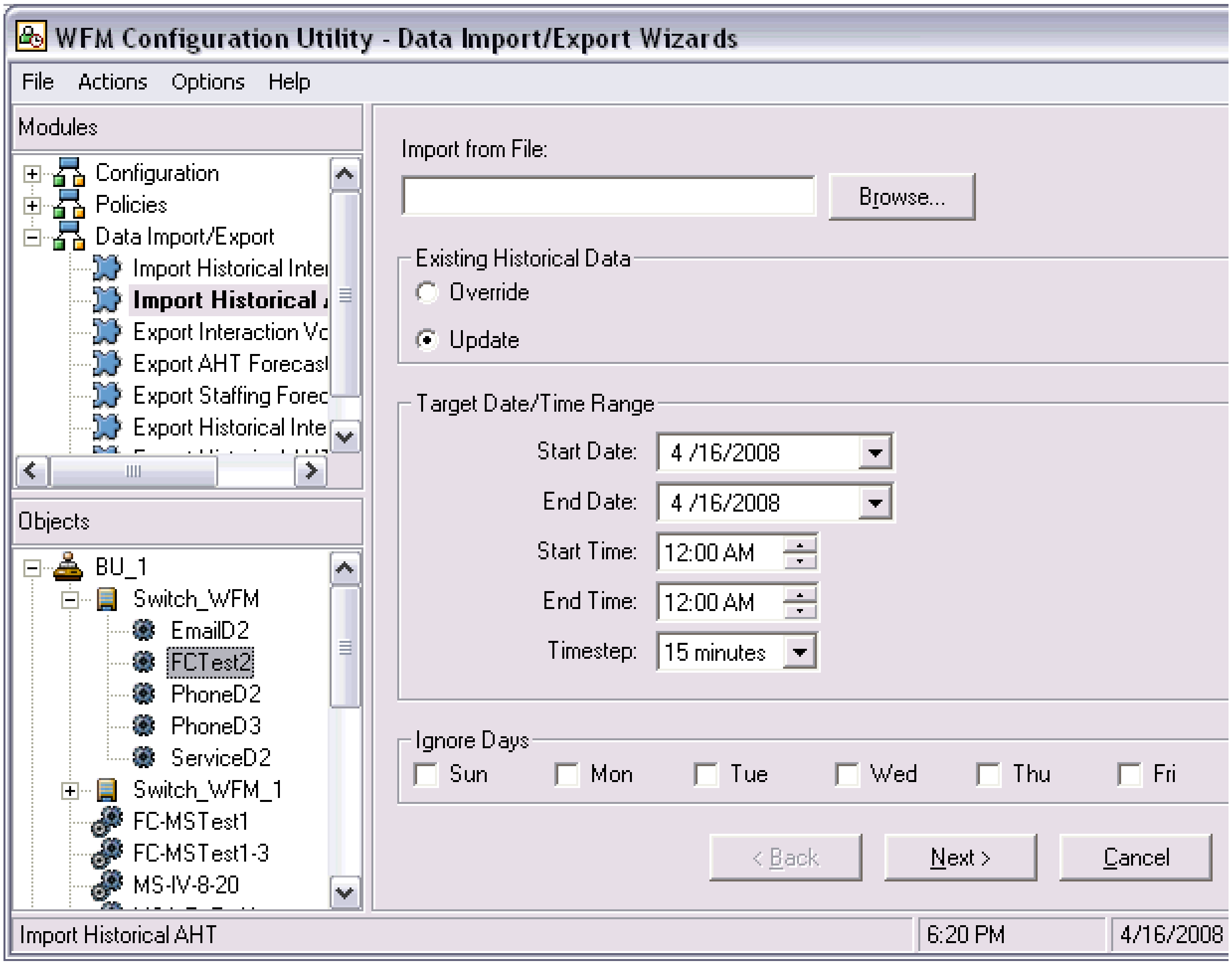

Figure 113: Data Import/Export dialog

Warning! This includes all data, not just the type you are importing. For example, if you are importing interaction volume data and select **Override**, AHT data is deleted as well.

If you select the Update radio button, all data for the data type you are importing is deleted. New data is imported into the timesteps for which new data exists. Any timesteps for which there is no data to import are given a value of *0*.

6. Select the date and time ranges and the timestep for the data you want to import or export.

Warning! WFM Configuration Utility does not import/export data for the last timestep in the selected period if you select the 15-, 30-, or 60-minute timestep. For example, assume your .CSV file contains data for the dates 4/15/2005 through 6/28/2005 in 15-minute timesteps. In order to completely import the data from every timestep, you must set the End Date to 6/29/2005 and the End Time to 12:00 AM.

Warning! When importing, WFM Configuration Utility only reads activity or multi-site activity open hours when the 24-hour timestep is selected. This is because the import file contains data for days only (one record per each day). Open hours acts as a filter. WFM does not use Start Time or End Time under Target Date/Time Range.

If the 15, 30, or 60 timestep is selected, data from the import file is filtered using the selected Start Time/End Time under Target Date/Time Range.

7. Select the check boxes next to any days for which you want data to be ignored. For example, you might use this to omit data from days when the activity is not open.
8. Click **Next.**

   The Progress window opens.
9. Click **Finish.**

See Finishing the Import/Export for assistance in finishing the procedure.

Finish the Import/Export

After you have begun the data Import/Export as explained in Import/Export Historical Data:

1. Click **Finish.**

   The Progress pane displays the number of records that are involved and the name of the file to which the records were imported or from which they were exported.
2. After the import/export is complete, click **Close** to exit Data Importer/Exporter.

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