Cisco Unified Workforce Optimization

Workforce Management Application User Guide
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Contents

Getting Started

The user interface provides the following applications.

- Dashboard
- My Schedule
- Messaging
- Agent Schedules
- Reporting
- Application Management
- Service Queue Group Management

The information provided in this section is common to each of these applications.

Usernames and Passwords

The user interface requires the following login information:

- For all roles in an Active Directory environment, use your network login username, password (the password is case-sensitive), and domain.

NOTE: The Domain field in the Login window appears only when your contact center uses Windows Active Directory.

- For administrators in a non-Active Directory environment, use the same username and password used for the administrator ID to log in to the user interface.
- All other roles in a non-Active Directory environment, ask your administrator for your username and password.

Single-User Login Authentication

The user interface supports several different products. You can log into one or more products using a single-user login. Single-user login allows you to log into all products simultaneously using a single username and password.

You can access the user interface by entering the URL in a web browser. Ask your administrator for the correct URL. The format for the URL is as follows:

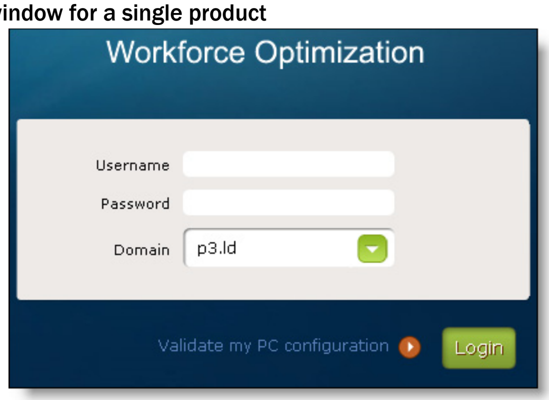
`https://<Base server>` or `http://<Base server>`

where <Base server> is the IP address or hostname for the user interface.

The appearance of the Login window depends on how the user interface is configured.

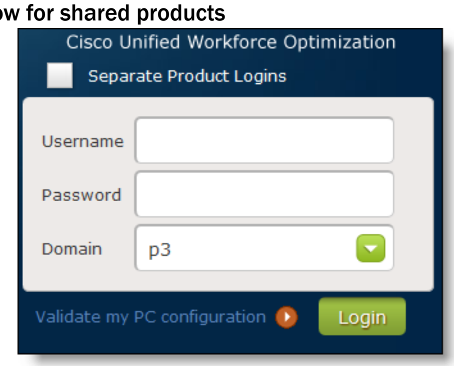
- If the user interface is configured for a standalone product, the Login window (Figure 1) displays only the login fields for that product. The Separate Product Logins check box does not appear in this situation.

Figure 1. Login window for a single product



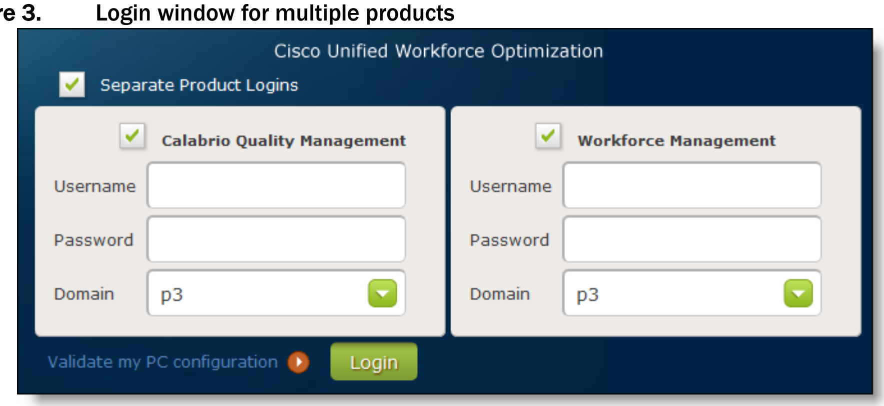
- If the user interface is configured to share common login fields for multiple products, the Login window (Figure 2) displays one common set of login fields for all products and the Separate Product Logins check box.

Figure 2. Login window for shared products



- If the user interface is configured to share common login fields for multiple products and you want to log into each product with different login credentials, select the Separate Product Logins check box. The Login window (Figure 3) will display login fields for each product. The check box for each product is selected by default. To log into only one product, clear the check box next to the product name you do not want to access, and then enter your user name, password, and domain, if required, for the selected product.

Figure 3. Login window for multiple products



If you are using Active Directory, the Domain drop-down list displays the domains that are common to both products. This is true for both shared and unshared logins. For example, if one product has domain p1, and the other product has domain p2, the other product drop-down list displays p1 and p2. Choose the correct domain for your username and password.

If you want the user interface to display text in a different language from the default language, choose the language from the Language drop-down list. The language you choose applies to all products. When you choose a language, the page is refreshed and the Login page displays the fields in the selected language.

When you choose a language, the choice persists between sessions and per user as a cookie. For example, if two users log in to the same machine using the same username and password at different times, they are changing the same cookie when they choose a language. If two users log in to the same machine using different usernames and passwords at different time, they are using different cookies when they choose a language. The cookie is associated with the user's login profile.

Once you log into these products through the user interface, you have access to the applications associated with each product, and the applications appear enabled in the toolbar at the top of the screen. Your access to all applications for each product persists as long as you have access to at least one application.

If one of the products is unavailable when you log in, the applications for that product will not be available.

Points to Remember

When logging into the user interface, remember the following points:

- Each product has a set of unique login requirements. You cannot log in to the user interface if:
  - You are an agent and you are not assigned to a team
  - You are a deactivated agent
- When the login credentials are correct, the user can access all applications in the user interface assigned to their role in the following instances:
  - A single-product configuration
  - A multiple-product configuration where the user enters a common username and password for all products using the shared login feature (the Separate Products Logins check box is cleared)
  - A multiple-product configuration where the user enters the correct username and password for each product when the Separate Products Logins check box is selected.
- When the login credentials are incorrect, an error message appears and the user cannot continue until the problem is resolved in the following instances:
  - A single-product configuration
  - A multiple-product configuration where the user enters a common username and password for all products using the shared login feature
- When a user has unique usernames and passwords for two or more products, the user can only access the applications where the login credentials are correct. No error message appears if one or more of the login credentials are incorrect in the following instances:
  - A multiple-product configuration where the user enters an incorrect username and password for one or more products when the Separate Products Logins check box is selected.
  - A multiple-product configuration where the user enters an incorrect username and password for one or more products when the using the shared login feature.

  If the login fails for one ore more of the products, select the Separate Product Logins check box to isolate the login issue by separately entering the login credentials for each product. The Separate Products Logins check box displays an error message that identifies the product associated with the login failure.

- If you are an administrator, log in to either one or all products as an administrator. Do not log in to one product as an administrator and another product as a user at the same time. The Dashboard might not behave as expected.
- If you are running multiple products from the same user interface, the user interface uses the same locale for each product. The Language drop-down list only displays languages that are common to all products.
- Your language selection is automatically saved as a cookie. You do not need to select the language each time you log in.

Displaying Multiple Browser Tabs

You can display multiple applications in different browser tabs during the same session.

Multiple Browser Tabs Guidelines

If you want to log in to the user interface using multiple browser tabs, follow these guidelines:

- You must log in to the user interface as a user from one browser tab on your PC. Each additional browser tab that you open will be associated with the username you used to log in to the first tab.
- Logging in or out of one browser tab effects all concurrent browser tabs.
- Only use multiple concurrent browser tabs to view screens. Do not initiate actions (for example, approving an agent's request, editing schedules, or adding events).

NOTE: Initiating actions as one user using multiple browser tabs is not supported and might cause synchronization issues.

- If you need to initiate an action, close all but one of your browser tabs before initiating the action.

Displaying Applications in Multiple Browser Tabs

TASK

1. Log in to the user interface.
2. Copy the Uniform Resource Locator (URL) from the browser's Address field.

3. Open a new browser tab, paste the URL in the browser's Address field, and press Enter.

4. Click the application button you want to appear in the new browser tab.

   STEP RESULT: The new browser tab displays the selected application.

5. Repeat step 3 through step 4 for each additional browser tab.

Validating Your PC

Before you log in to the user interface for the first time, validate your PC. This task ensures your PC is compatible with the user interface.

TASK

1. Enter the following URL in your web browser, where <Base server> is either the IP address or hostname of the user interface.

```
https://<Base server>
```

   STEP RESULT: The Login window appears.

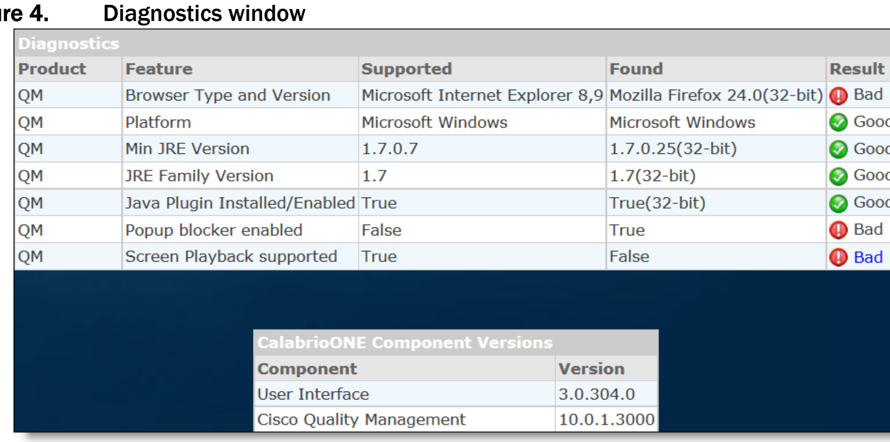
2. Click Validate my PC Configuration.

   – If the Results column displays Good for each feature you can log into the user interface.
   – If you get a Bad result, click Bad for additional information. A dialog box appears with instructions and, if applicable, hyperlinks to the required software. Correct the problem, and then click Validate my PC Configuration again.

     Contact your system administrator if any value other than Good appears in the Results column and you are not able to resolve the problem.

STEP RESULT: The Diagnostics window appears (Figure 4). The Diagnostics window displays the results for each product's features. If only one product is installed, the window only displays the features for that product. Some of the values that appear in the Diagnostics window are browser dependent. See the Desktop Requirements Guide for more information on browser dependencies.

Figure 4. Diagnostics window



Diagnostics

Product	Feature	Supported	Found	Result
QM	Browser Type and Version	Microsoft Internet Explorer 8,9	Mozilla Firefox 24.0(32-bit)	Bad
QM	Platform	Microsoft Windows	Microsoft Windows	Good
QM	Min JRE Version	1.7.0.7	1.7.0.25(32-bit)	Good
QM	JRE Family Version	1.7	1.7(32-bit)	Good
QM	Java Plugin Installed/Enabled	True	True(32-bit)	Good
QM	Popup blocker enabled	False	True	Bad
QM	Screen Playback supported	True	False	Bad

CalabrioONE Component Versions

Component	Version
User Interface	3.0.304.0
Cisco Quality Management	10.0.1.3000

The Component Versions window displays the current versions of the user interface and each product associated with this user interface.

Clearing Your Cache

If the user interface does not display screens properly (for example, you see a blank screen), log out, clear your cache, and then log in again.

To clear the cache for your web browser, perform the following task:

TASK

- In Microsoft Internet Explorer, choose Tools > Internet Options, select the Delete Browsing History on Exit on the General tab, click Delete, click OK, close the browser, and then restart the browser.

Logging In

PREREQUISITE You must have a username and password for the user interface in order to log in.

This task shows you how to log in to one or more products.

TASK

1. Enter the following URL in your web browser, where <Base server> is either the IP address or hostname of the user interface.

   `https://<Base server>` or `http://<Base server>`

   STEP RESULT: The Login window appears.

2. Complete the remaining fields in the Login window, and then click Login.

   ADDITIONAL INFORMATION: Pressing the Enter key only works when your cursor is in the Password field. If your cursor is in the Domain field, pressing the Enter key will not log you in to the user interface.

   STEP RESULT: If you successfully log in to each product, the applications for each product appear in the toolbar at the top of the screen.

   If you are logging in to multiple products and the login for all products fail, the Login window appears. Reenter your username and password, and try again.

   If you are logging in to multiple products and the login fails for only one of the products, a Login Failure dialog box appears for that product. Reenter your username and password, and try again.

Logging Out

This task shows you how to log out of the user interface.

TASK

- To log out of the user interface, move your cursor over <user name> in the upper right corner, where <user name> is your name, in the Signed In field, and then click Log Out.

  STEP RESULT: You have explicitly logged out of the user interface.

- To exit the user interface, close the web browser.

  ADDITIONAL INFORMATION: You have implicitly logged out of the user interface.

  You can log back in to the user interface at any time.

Access Based on Role

Table 1 shows the features available by role.

Table 1. Access based on role

Application	Administrator	Supervisor	Agent
Agent Schedules		X	
Application Management	X		
Dashboard	X	X	X
Messaging		X	X
My Schedule		X	X
Reporting		X	X
Service Queue Group Management	X		

About Your Role

The administrator can assign one or more roles to your username. If you have been assigned to multiple roles (for instance, if you are both an agent and supervisor), all features associated with each role are automatically available when you log into the user interface.

Administrator Tasks

When logged in with the administrator ID, an administrator can perform the following tasks:

- Configure which widgets appear in the agent and supervisor dashboard, by role
- Lock down the dashboard, by role, so that agents and supervisors cannot change it
- Configure how adherence is calculated

Supervisor Tasks

Workforce Management enables supervisors to perform the following tasks:

- Display agent productivity indicators
- Manage requests from agents by approving or denying schedule trades and offers, exception requests, and time off requests (advanced bundle only)
- Update the production schedule by inserting an activity in an agent’s schedule, trading schedules between agents, and deleting an agent’s schedule
- View agent coverage and adherence
- Display agent statistics and compare them over time
- Run the Internal Service Queue report

Agent Tasks

Workforce Management enables agents to perform the following tasks:

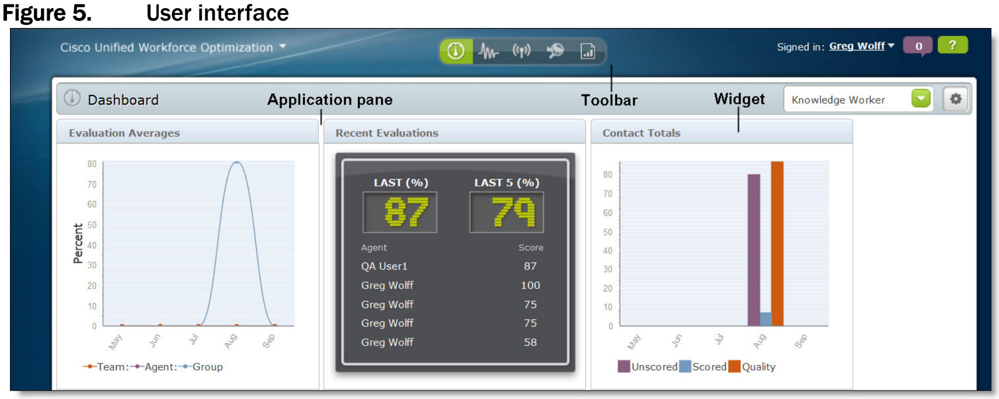
- Display productivity indicators
- View the agent’s schedule
- Trade schedules with another agent
- Offer schedules to other agents
- Request time off (advanced bundle only)
- Request exceptions
- Display the agent’s statistics and compare them over time

At a Glance

The user interface (Figure 5) is divided into the following sections.

- Toolbar—the toolbar at the top of the window that displays navigation buttons you can use to perform the following tasks:
  - Access the user interface's common applications.
  - View the name of the user who is currently signed in to the user interface. To log out, move your cursor over <user name> in the Signed In field, and then click Log Out.
  - Access the available help by product.
- Application pane—the center region displays the application.
- Widget—a self-contained application that can be configured for a specific purpose.

Figure 5. User interface



Toolbar

Table 2 describes the buttons that appear in the toolbar at the top of the screen.

Table 2. Toolbar

Button	Icon	Description
Dashboard		Provides information based on the products installed with the user interface. Administrators can log in to the user interface and lock down the Dashboard by role.
My Schedule		Allows you to display your schedule by day, week, or month with a detail, summary, or list view.
Messaging		Allows you to manage schedule requests.
Agent Schedules		Allows you to manage schedules for selected agents by updating the production schedule. NOTE: This button is only available to supervisors.
Reporting		Allows you to generate statistics report.
Application Management		For this product, this application allows you perform the following tasks: • Configure the in-adherence states and reason codes • Configure shrinkage percentages that can be applied when generating a schedule
Service Queue Group Management		Allows you to configure and manage service queue groups.
Signed In	NA	Displays the name of the current user. To log out, move your cursor over <user name> in the Signed In field, and then click Log Out.
Help		Displays the available help by product.

The drop-down menu by the logo allows you select the application you want to use. The menu lists all the applications that appear in the toolbar and any sub-menus associated with each application.

Application Pane

The application pane displays the application you select from the toolbar. See "Toolbar" on page 18 for more information on available applications.

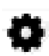
The applications available to you depend on your role and software license.

Applications

All applications available in the user interface have the same basic layout.

Table 3 lists the application buttons.

Table 3. Application buttons

Icon	Name	Description
NA	Apply	Saves your changes.
NA	Cancel	Exit without saving changes.
	Settings	Displays the configurable settings for this application. Click the icon again to hide the settings.

An Error icon  appears next to a field when you enter the wrong information.

Tables

The interface often displays information in tables. These tables can be modified to your preferences.

Sorting Tables

Data that is presented in tabular form can be sorted based on the contents of a single column in the table. The sort can be ascending or descending.

When you click a column header, a small triangle at the right of the primary sort column heading displays the direction of the sort, ascending or descending.

Managing Tables

TASK

- To sort a table by one column, click the column heading. Click again to reverse the sort order.
- If the table is long, use the scroll bar at the right of the table to move up and down the table.
- If the table is wide, use the scroll bar at the bottom of the table to move left and right.

ADDITIONAL INFORMATION: There is no Save button.

Moving Items between Lists

The following applications allow you to move items between lists:

- Dashboard
- Reporting

TASK

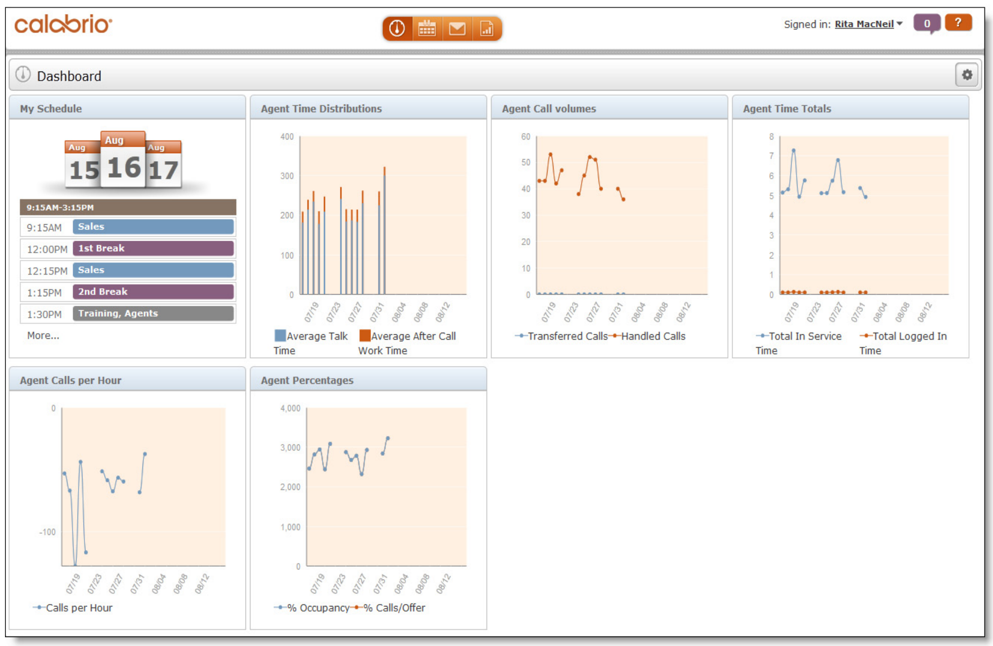
- Use these mouse actions to move items between lists:
  - To move an item from one list to another list, click the item in one list and drag it to the other list.
  - To move multiple contiguous items, click the first item in the list, shift-click on the last item in the list, and then drag the items to the other list.
  - To move multiple noncontiguous items, press the Ctrl key while selecting each item in the list, and then drag the items to the other list.
  - To move an item from one location in a list to another location in the same list, click and then drag the item to the location you want it to appear in the list.
  - To move multiple contiguous items in a list to another location in the same list, click the first item in the list, shift-click on the last item in the list, and then drag the items to the location you want it to appear in the list.
  - To move multiple noncontiguous items in a list to another location in the same list, press the Ctrl key while selecting each item in the list, and then drag the items to the location you want it to appear in the list.

Dashboard

The Dashboard application (Figure 6) is a common (multi-product) application that contains product-specific widgets. It is displayed by default when you log in.

The widgets that you see depends on which products you log into, your role, and the dashboard view assigned to you by the administrator. For example, if you log into two products as an agent, you will see the widgets for both those products that the administrator configured for the agent dashboard. If one of the products is down, the widgets associated with that product do not appear.

Figure 6. Dashboard application



The dashboard displays all widgets in a continuous sequence, left to right and top to bottom. Blank spaces between widgets are not allowed.

If enabled by your administrator, you can click Settings to customize the layout and contents of your dashboard. You can:

- Select the widgets to display
- Rename widgets
- Configure widget settings
- Reposition the widgets in the dashboard

Changes made to the dashboard or widget settings are saved automatically and persist until they are changed by either you or the administrator.

Besides the Settings button in the toolbar, administrators have access to a drop-down list box that contains a list of roles. The administrator selects the role whose dashboard view is to be configured.

Available Widgets by Role

The the following list displays the widgets that are available to users according to their role. You might see all or a subset of these widgets in your dashboard, depending on how your administrator configured the dashboard for your role.

If you are logged into other products, you will see widgets for those products as well. Consult the user documentation for the other products for complete widget descriptions.

Agents

- Agent Calls Per Hour
- Agent Call Volumes
- Agent Percentages
- Agent Time Distributions
- Agent Time Totals
- My Schedule

Supervisors

- Agent Calls Per Hour
- Agent Call Volumes
- Agent Percentages
- Agent Time Distributions
- Agent Time Totals
- My Schedule
- Real Time Adherence
- Service Queue Performance

Widget Toolbar

When you mouse over a widget toolbar, one or two buttons become visible. Table 4 describes these toolbar buttons.

Table 4. Widget toolbar buttons

Button	Icon	Description
Action Link		Closes the current application and opens another application that displays information related to the widget.
Settings		Displays the configurable settings for this widget. When you apply changes to the settings, the changes persist each time you log in. Click the icon again to hide the settings.

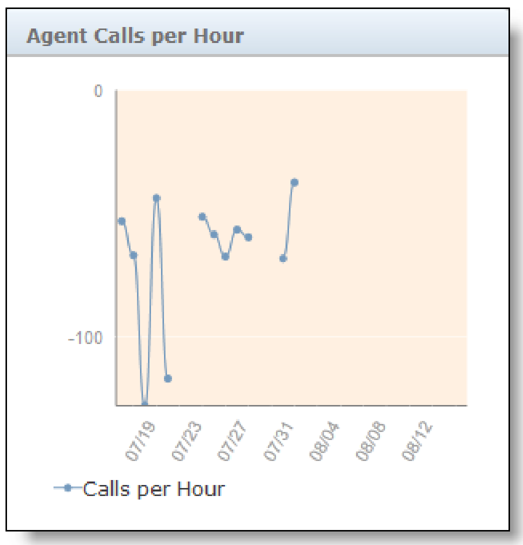
Widget Descriptions

This section describes the widgets available in your dashboard.

Agent Calls per Hour Widget

The Agent Calls per Hour widget (Figure 7) displays the average number of ACD calls per hour an agent handles over the selected date range. Data can be grouped by day or by month, for a range of 1–12 months. You can hover your mouse over a data point in the chart to display a screentip containing the exact value for the data point.

Figure 7. Agent Calls per Hour widget

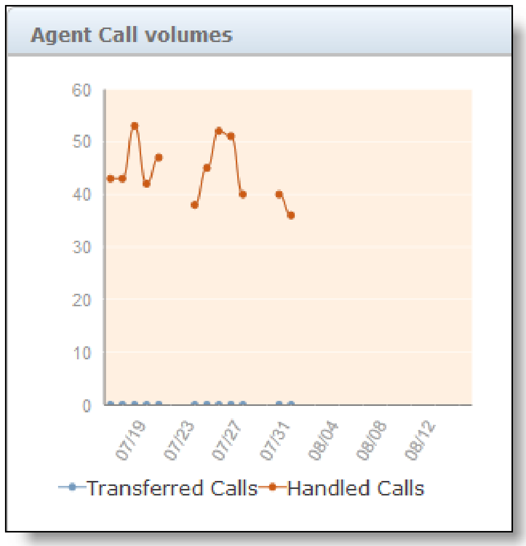


A call is counted in the schedule interval in which the agent answers it. For example, if an agent answers a call at 10:58 and completes the call at 11:03, that call is counted in the 10:00–10:59 schedule interval.

Agent Call Volumes Widget

The Agent Call Volumes widget (Figure 8) displays an agent's call volumes for the selected date range. Data can be grouped by day or by month, for a range of 1–12 months. Hover your mouse over a data point in the chart to display a screentip containing the exact value for the data point.

Figure 8. Agent Call Volumes widget



You can choose to display either handled calls (the total number of ACD calls completed by the agent) or transferred calls (the total number of ACD calls transferred by the agent), or both.

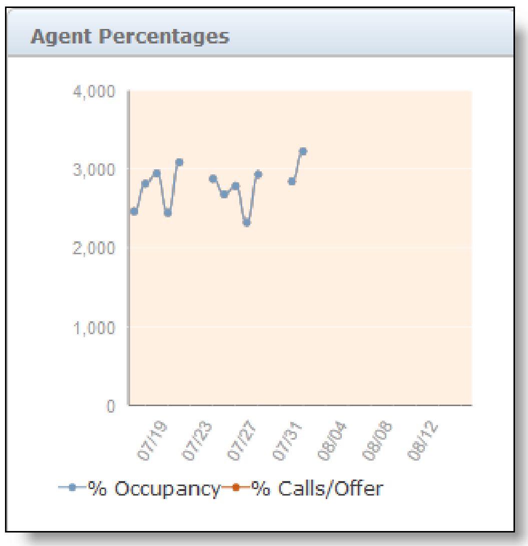
> NOTE: A zero in the graph indicates the agent logged in during the day but took no calls. No data in the graph indicates that the agent did not log in on that specific day.

Agent Percentages Widget

The Agent Percentages widget (Figure 9) displays your occupancy ratio or percentage of calls answered, or both, for the selected date range.

Data can be grouped by day or by month, for a range of 1–12 months. You can hover your mouse over a data point in the chart to display a screentip containing the exact value for the data point.

Figure 9. Agent Percentages widget



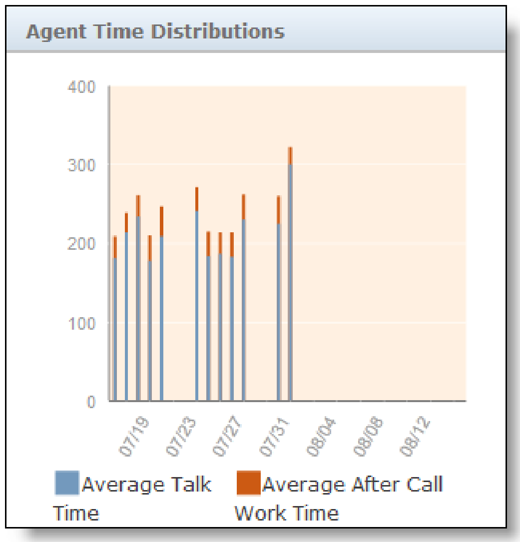
You can choose to display either or both of the following data elements in any order from the Settings window.

- % Occupancy—The percentage of logged-in time that the agent spends in active contact handling states (for example, on incoming calls, in wrapup activity, on outbound calls).
- Utilization—The percentage of offered calls that the agent answered.

Agent Time Distributions Widget

The Agent Time Distributions widget Figure 10 displays the average time you spent in a specific ACD state for the selected date range.

Figure 10. Agent Time Distributions widget



Data can be grouped by day or by month, for a range of 1–12 months, and is expressed in seconds. You can hover your mouse over a data point in the chart to display a screentip containing the exact value for the data point.

You can choose to display up to three of the following data elements in any order.

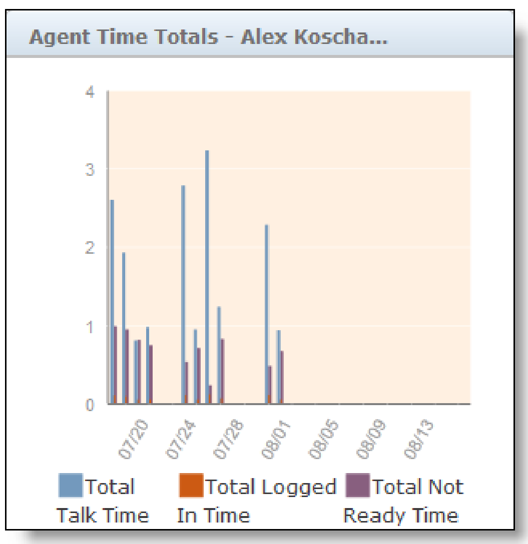
Data Element	Description
Average Processing Time	The average amount of time an agent was in the Talking, On Hold, Work Ready, and Work Not Ready states. Default option for Series 1 in the Settings window.
Average Talk Time	The average amount of time an agent was on incoming ACD calls, beginning when the call is answered until the call is disconnected, including hold time.
Average Hold Time	The average amount of time the agent placed calls on hold, including hold time for transfers and conferences.

Data Element	Description
Average After Call Work Time	The average amount of time an agent spent in the Work state immediately following an ACD call.
Average Ready Available Time	The average amount of time an agent was logged in and available to accept ACD calls.
Average Not Ready Time	The average amount of time an agent was logged in but not available to take ACD calls.

Agent Time Totals Widget

The Agent Time Totals widget (Figure 11) displays the total time an agent spent in specific ACD states for the selected date range.

Figure 11. Agent Time Totals widget



Data can be grouped by day or by month, for ranges between 1 and 12 months, and is presented in HH:MM:SS format. You can hover your mouse over a data point in the chart to display a screentip containing the exact value for the data point.

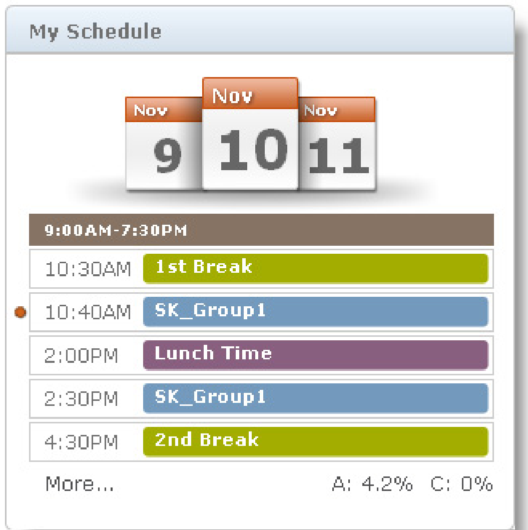
You can choose to display up to three of the following data elements in any order.

Data Element	Description
Total Processing Time	Depends on which ACD your system uses: Unified CCE or Unified CCX—The total amount of time an agent was in the Talking, On Hold, Work Ready, and Work Not Ready states Nortel—The total amount of time an agent was in the Talking, On Hold, and Break (Work) states. Avaya—The total amount of time an agent was in the Talking, On Hold, and After Call Work states.
Total Talk Time	The total amount of time an agent was on incoming ACD calls, beginning when the call is answered until the call is disconnected, including hold time.
Total Hold Time	The total amount of time the agent placed calls on hold, including hold time for transfers and conferences.
Total After Call Work Time	The total amount of time an agent spent in the Work state immediately following an ACD call.
Total Ready Available Time	The total amount of time an agent was logged in and available to accept ACD calls.
Total Not Ready Time	The total amount of time an agent was logged in but not available to take ACD calls.
Total In Service Time	The total amount of time an agent was either in a Ready state or was handling a call (total talk time plus total after-call time). Default option for Series 1 in the Settings window.
Total Logged In Time	The total time during the period the agent was logged into the ACD. Default option for Series 2 in the Settings window.

My Schedule Widget

The My Schedule widget (Figure 12) displays a summary of an agent's schedule for today. The widget shows the agent's last activity, current activity (marked with a red dot) and next three activities. If the schedule has more activities than that, the word "More" appears at the bottom of the widget.

Figure 12. My Schedule widget



The widget also shows the agent's current adherence (A) and compliance (C) percentages for the day. For information on how the adherence and compliance percentages are calculated, see "Real Time Adherence Widget" on page 31.

If the agent is not scheduled for any activities, My Schedule displays the message, "Nothing Scheduled On This Day".

You can view previous and future schedules one day at a time by clicking backward and forward through the calendar pages.

You can click the Link button in the widget toolbar to open the My Schedule application and view today's schedule in full.

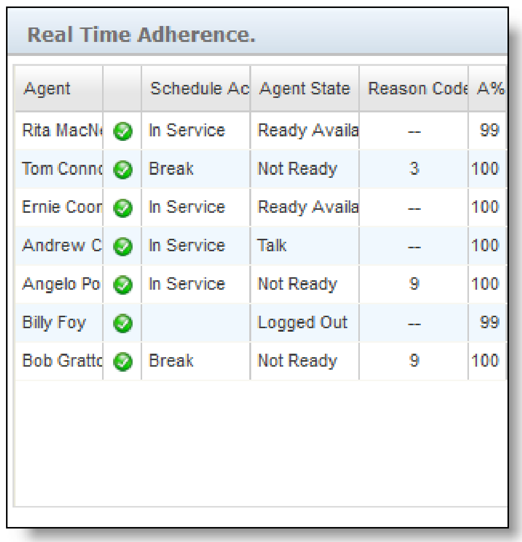
The activity start and end times shown are based on the Display Time Zone configured for the agent by the administrator, while the date is based on the WFM server's time zone. If the schedule crosses midnight, the start times for activities before midnight are highlighted. See "Time Zone Considerations" on page 49 for more information on time zones.

Agents cannot modify the My Schedule widget. Supervisors can modify the widget by selecting the agent whose schedule is displayed in the widget and renaming the widget as desired.

Real Time Adherence Widget

The Real Time Adherence widget (Figure 13) is available to supervisors only. It displays real time adherence data for selected agents. The data is updated every 30 seconds.

Figure 13. Real Time Adherence widget



Columns in the widget can be resized by dragging the column header dividers to the left or right. The table rows can be sorted in ascending or descending order by clicking the column header.

You can click the Link button in the widget toolbar to open the Agent Schedules application and view today's schedule in full.

You can choose to display selected agents and up to five of the following data elements in any order.

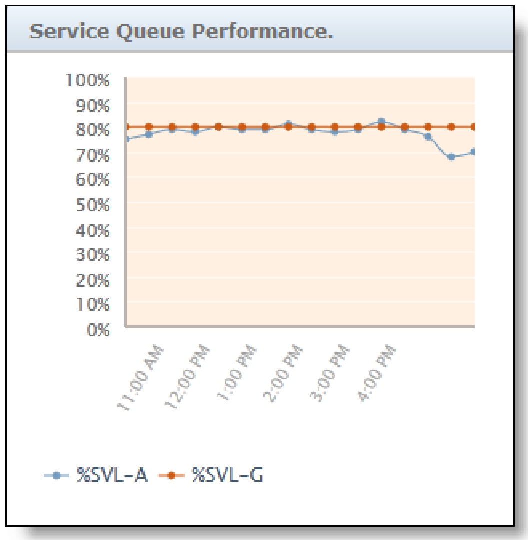
Data Element	Description
Adherence State	Displays a red dot if the agent is not in adherence, and a green dot if the agent is in adherence.
Schedule Activity	The agent's current scheduled activity. If the agent is not available, the field is blank.

Data Element	Description
Agent State	The agent’s current ACD state.
% Adherence	The percentage of time that agents follow their schedules. When calculating adherence, WFM considers scheduled arrival and departure times, breaks, lunches, and time spent on scheduled activities, and compares the actual activity to the scheduled activity each millisecond through the work shift. Adherence is calculated according to the following formula: [(configured schedule adherence minutes – minutes not in adherence) ÷ configured schedule adherence minutes] × 100 Where “configured schedule adherence minutes” is the sum of time scheduled for activities the administrator has configured in the Application Management application’s Calculate Adherence column as “Yes”. NOTE: If the formula produces a negative value, the field displays 0.
% Conformance	The percentage of time an agent works the right amount of time regardless of the time of day when the agent works. Schedule conformance does not take arrival and departure times into account. Schedule conformance is calculated according to the following formula: (Total time an agent is in a ready, talk, hold, or work state) ÷ (total scheduled in-service time) × 100 In service time does not include lunch, breaks, projects, or exceptions.
Reason Code	The reason code associated with the Logged Out and Not Ready state in the Scheduled Activity column.

Service Queue Performance Widget

The Service Queue Performance widget (Figure 14) is available only to supervisors. It displays the real time service level performance for the selected service queue and optionally the goal (forecasted) service level performance as well. The data is updated every 30 minutes at 15 minutes past the hour and 45 minutes past the hour.

Figure 14. Service Queue Performance widget



Data can be grouped by day or by interval, for ranges between 8 and 180 days.

The service level percentage is the percentage of actual calls answered for each interval within the service threshold time.

To compare the actual service level performance (%SVL-A) with the forecasted (goal) service level performance (%SVL-G), select Interval from the Group By drop-down list and then select the Goal check box in the Settings window.

Administrators

By default, a user's dashboard contains every widget available for their role. Administrators can customize dashboards by role by configuring which widgets appear, how they are named, what information they contain, and how that information is presented.

If users are already logged in when the administrator customizes their dashboard, those users will not see any changes in their dashboard. They will continue to see either the default dashboard for their role, or the dashboard they have customized for themselves.

If the administrator customizes a dashboard for a role and then locks it down, users with that role will see the customized dashboard the next time they log in. The locked-down dashboard overrides default and user-defined dashboards, and individual users will no longer be able to change anything in their dashboard.

Configuring the Dashboard by Role

PREREQUISITE

You must log in using the username and password for the administrator ID.

TASK

1. Select a role from the Role drop-down list in the Dashboard toolbar and then click Settings to display the Configure Dashboard Widgets window.
    a. Drag the widgets you want to appear on the dashboard from the Available Widgets list to the Selected Widgets list. To move widgets back to the Available Widgets list, select them and then click Delete Selected Widgets.
    b. If you want to rename a widget, double-click the widget in the Selected Widgets list and customize its name as desired.
    c. If you want to lock down the dashboard so that users cannot change it, select the Lock Down check box.
2. Click Apply to save your changes and close the Configure Dashboard Widgets window.
3. If desired, rearrange the order in which the widgets appear in the dashboard by dragging them into place. A Down Arrow appears when you drag the widget to a legitimate position.
    – You can also arrange widgets in the Configure Dashboard Widgets window, but it is recommended you arrange them in the dashboard to show you what the users will actually see.
    – You cannot drag a widget to an empty space.
4. Configure the settings for each individual widget as desired.

Agents and Supervisors

The content of your dashboard depends on if the dashboard is unlocked, or if the administrator has configured the dashboard for your highest role and then locked it down.

Managing Your Unlocked Dashboard

If the administrator has not locked your dashboard, you are free to customize it as you desire. The changes you make override the default dashboard or the customized dashboard your administrator has configured for your role. Your customized dashboard will persist in future login sessions unless your administrator configures and then locks a dashboard for your role.

With an unlocked dashboard, you can do the following:

- Rearrange the widgets on your dashboard. Click the widget toolbar and drag the widget to a new location. A downward-pointing arrow appears when the widget is dragged to a legitimate location.
- Add or delete widgets from your dashboard. Click Settings on the dashboard toolbar to open the Configure Dashboard Widgets window, To add widgets, drag them from the Available Widgets list to the Selected Widgets list. To delete widgets, select them in the Selected Widgets list and click Delete Selected Widgets.
- Rename widgets. In the Configure Dashboard Widgets window, double-click the widget you want to rename, type the new name in the Rename Widget dialog box, and click Apply.
- Configure the content and appearance of widgets. Click Widget Configuration in the widget toolbar and set up the data and type of chart you want to see displayed in the widget. See “Widget Descriptions” on page 24 for more information on what you can configure for individual widgets.

Managing Your Locked Dashboard

If the administrator has locked your dashboard, you can no longer change most features. The dashboard Settings icon is disabled.

When the dashboard is locked, you cannot do the following:

- Add or remove widgets from the dashboard.
- Reposition widgets in the dashboard.
- Rename widgets.

- Configure individual widgets to change the data and type of chart displayed.

Some users, depending on their role, are still able to select agents and services in certain widgets. In these widgets the Configure Widgets icon is present in the toolbar. For example, a supervisor can select an agent in the Agent Call Volumes widget. However, all other elements of the widget are locked down and cannot be changed.

If the widget does not include selections for agent or service, the Configure Widget icon is disabled in the widget toolbar.

Application Management

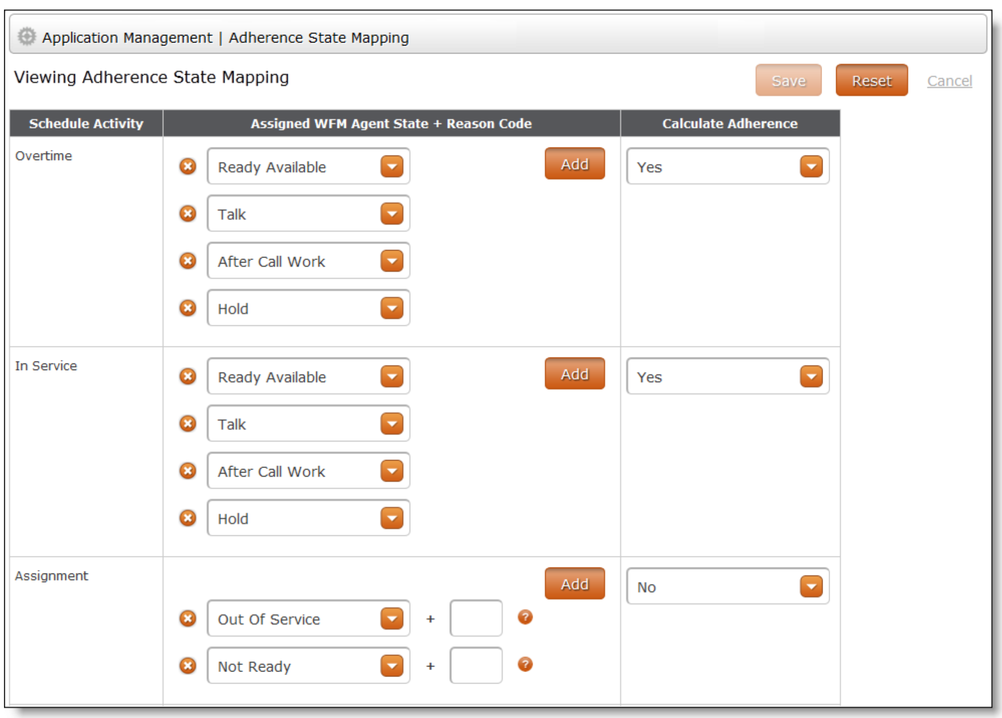
The Application Management application is used by administrators to configure product features. If users have access to more than one product, all configurable features for the products are available through this application. Products must be running for the associated configurable features to be available.

In WFM, the administrator can use this application to customize how adherence is calculated and configure shrinkage percentages.

Adherence State Mapping

The Adherence State Mapping window (Figure 15) enables an administrator to specify which agent states and reason codes determine if an agent is or is not in adherence for a scheduled activity, and which schedule activities and agent states are used to calculate agent adherence percentages.

Figure 15. Adherence State Mapping window



The default settings are the most common method for calculating adherence, and it is not necessary for the administrator to change them. However, the settings can be customized for your contact center.

Agents will be shown to be in adherence if they are in one of the agent states mapped to a specific scheduled activity. If they are in an agent state not mapped to the scheduled activity, they will be shown to be out of adherence.

For example, in Figure 16 an administrator has mapped two ACD agent states, Out of Service (with reason code 2) and Not Ready (with reason codes 1 and 3), to the Assignment schedule activity. This means that when an agent is scheduled with an assignment activity, that agent must be in the Out of Service agent state with reason code 2 or the Not Ready agent state with reason code 1 or 3 in order to be in adherence. Any other agent state/reason code during the scheduled time will result in the agent being shown not in adherence.

The administrator has also decided that whether or not an agent is in adherence for the Assignment schedule activity will not be considered when calculating that agent's adherence percentage score. The Calculate Adherence field is set to "No".

Figure 16. Adherence mapping example

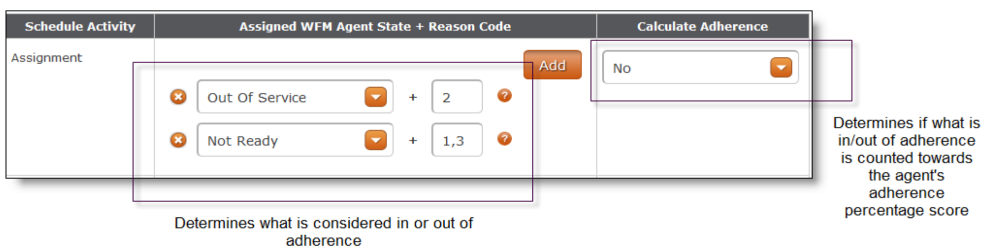


Table 5 lists the columns that appear in the Adherence State Mapping window.

Table 5. Scheduling columns

Name	Description
Schedule Activity	The scheduled activities that can be used to calculate adherence.
Assigned WFM Agent State + Reason Code	The agent state and reason code used to calculate agent adherence to the schedule activity.
Calculate Adherence	Select Yes to include or No to exclude time adherence data for the schedule activity in the calculation of the agent's adherence percentage.

Managing Adherence State Mapping

To customize how adherence is shown and calculated in your contact center, do the following.

1. For each schedule activity, configure at least one agent state you want considered to be in adherence. Select the appropriate agent state from the agent state drop-down list. If you need to add an agent state field, click Add. If you need to delete an agent state field, click the Delete button to the left of the field.
2. Configure the reason codes you want to consider as being in adherence for the schedule activities that use reason codes. Valid values are 1–65535.
    - A blank field indicates all reason codes are considered.
    - A dash between numbers indicates a range. “1–3” means reason codes 1, 2, and 3 are considered.
    - A comma between numbers indicates specific numbers. “1,3,5” means reason codes 1, 3, and 5 are considered.
    - You can use a combination of a range of numbers and specific numbers, for example, “1–5,7,9,12”.
3. In the Calculate Adherence field, select Yes to include or No to exclude time adherence data for the schedule activity in the calculation of the agent’s adherence percentage.
4. Click Save to save your changes, or Discard to cancel your changes.

To revert the adherence state mapping settings to the default configuration, click Reset.

WFM Default Configuration

The WFM Default Configuration window enables the administrator to set up system-wide parameters for WFM. At this time the only parameter available is shrinkage percentages.

Shrinkage Percentages

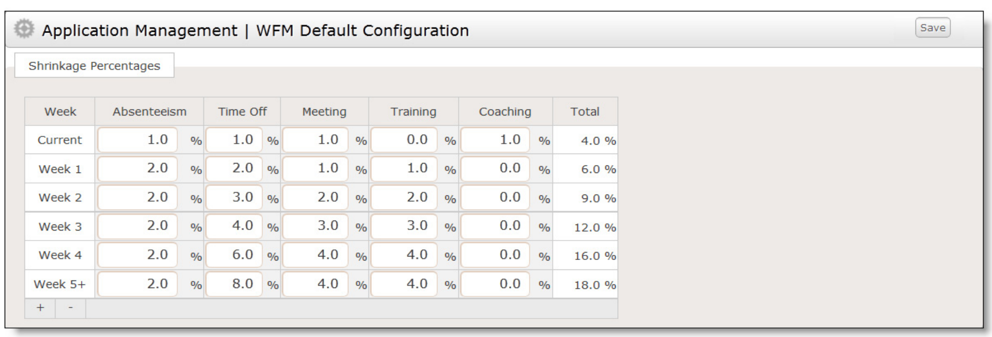
Contact center shrinkage is a measure of how much time is lost in the contact center due to agents taking time off for various reasons. These reasons can include breaks, lunch, holidays, sick time, and training. The shrinkage percentage is used to take this into account when running a schedule. When shrinkage percentages are applied, the schedule overstaffs the service by the shrinkage percentages configured in this table.

The number of agents available to work when a schedule is run is not the same as the actual number of agents available once that future date arrives. This is due to predictable and unpredictable activities that cause these agents to no longer be available to work. The percentage difference between the two numbers is the shrinkage percentage.

For example, on September 1 a schedule is run for the week of September 21. On August 31, Agents A, B, and C submitted time off requests for September 23. Only Agent A's request was approved on September 1 before the schedule was run, and so Agent A is not considered available to work on that day. Agent B's and Agent C's time off requests were not approved until September 3, and so were scheduled to work on September 23 despite their pending time off requests when the schedule was run. When those requests are approved on September 3, the number of agents scheduled to work on September 23 shrinks by two agents.

The Shrinkage Percentages feature (Figure 17) enables you to enter shrinkage percentages into WFM for the current week and for up to 12 weeks into the future. Each week, the shrinkage percentage lessens as a schedule week approaches the current day. This is because the activities (such as time off) that remove agents from the pool of available agents are added to the schedule, and you do not need to allow for the same amount of shrinkage each week. You become more certain of the number of agents available to be scheduled as you draw closer to the schedule week.

Figure 17. Shrinkage Percentages table



Week	Absenteeism	Time Off	Meeting	Training	Coaching	Total
Current	1.0 %	1.0 %	1.0 %	0.0 %	1.0 %	4.0 %
Week 1	2.0 %	2.0 %	1.0 %	1.0 %	0.0 %	6.0 %
Week 2	2.0 %	3.0 %	2.0 %	2.0 %	0.0 %	9.0 %
Week 3	2.0 %	4.0 %	3.0 %	3.0 %	0.0 %	12.0 %
Week 4	2.0 %	6.0 %	4.0 %	4.0 %	0.0 %	16.0 %
Week 5+	2.0 %	8.0 %	4.0 %	4.0 %	0.0 %	18.0 %

The Shrinkage Percentages table is set up so you can divide your contact center's shrinkage percentages among various general categories: absenteeism, time off, meetings, training, and coaching. Note that you do not need to use those categories. WFM considers only the total percentage for each week in its calculations. You can put an overall shrinkage percentage in any of the available columns for each week.

In Figure 17, the administrator has opted to show the contact center's shrinkage percentages for each category. The lowest percentage is for the current week: 4% of the scheduled agents will not be available to work. The percentages become higher the further into the future you go: at five weeks in the future, the administrator estimates that 18% of scheduled agents will not be available to work for various reasons.

Managing Shrinkage Percentages

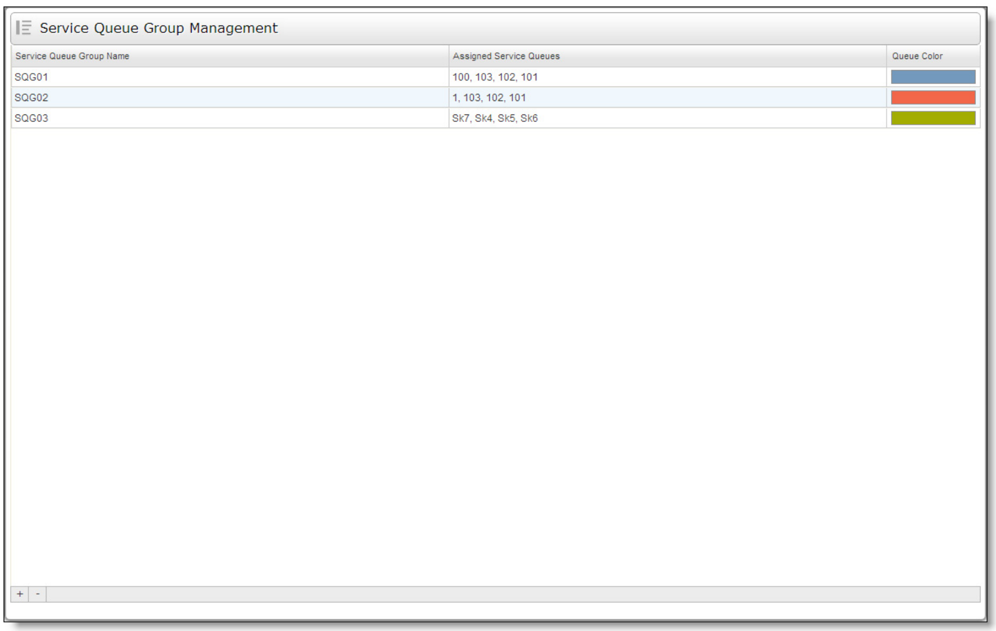
To enter shrinkage percentages for your contact center, do the following.

1. Determine how many weeks out you want to enter shrinkage percentages. The Shrinkage Percentages table can accommodate up to 13 rows, the current week plus 12 weeks into the future. To add a row, click the plus (+) sign at the bottom of the table. New rows are always added at the bottom. To delete a row, position your cursor in the row you want to delete and click the minus (–) sign at the bottom of the table.
2. In each row, enter the desired shrinkage percentage for a category. You do not need to enter a percentage for every category, or to use categories at all. You can enter an aggregate shrinkage percentage in any column except the Totals column. The Totals column is automatically updated as you add percentages to the other columns in the table.
3. When you have completed entries in the table, click Save.

Service Queue Group Management

The Service Queue Group Management application (Figure 18) allows you to create and manage service queue groups. A service queue group is a collection of individual service queues. When service queues are combined into one service queue group, all the data for the individual service queues is rolled up into a total number for each metric. Service queue groups is one of the selection criteria available on various pages in WFM, such as the Agent Schedules page.

Figure 18. Service Queue Group Management window



Add Service Queue Group

The Add Service Queue Group dialog box (Figure 19) enables you to create and manage service queue groups.

Figure 19. Add Service Queue Group dialog box

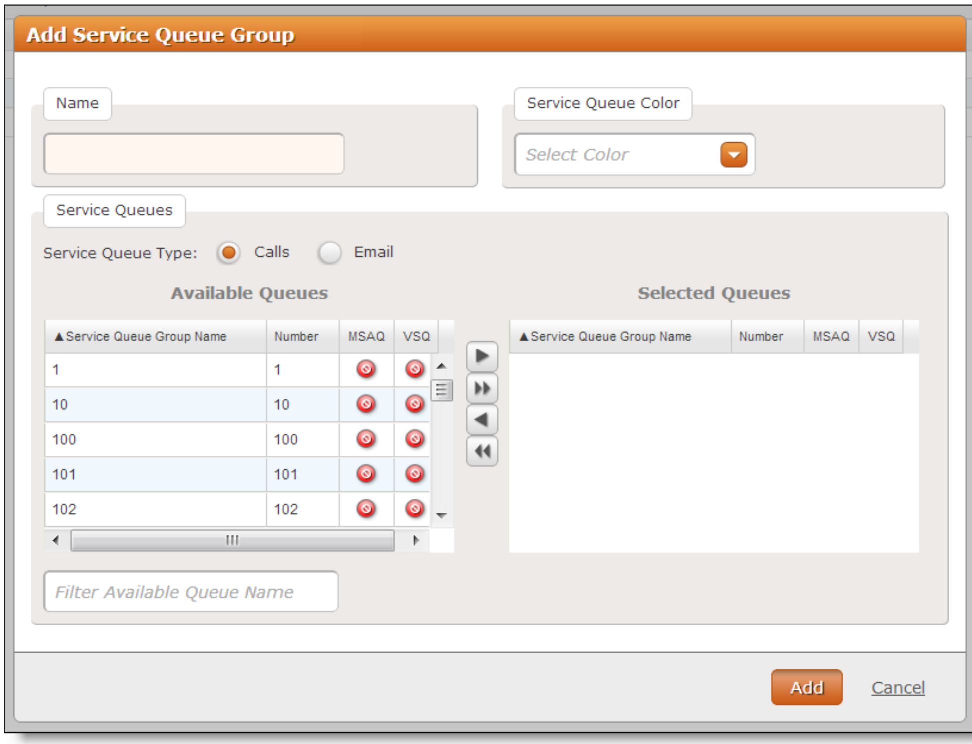


Table 6 describes the fields in the Add Service Group dialog box.

Table 6. Add Service Queue Group dialog box fields

Field	Description
Name	The name of the service queue group.
Service Queue Color	The color you want to assign to the service queue group. Select a color from the drop-down list.
Service Queue Type	Specify if the service queue group is for call service queues or email service queues. The service queues must be of one type in the service queue group.
Available Queues	A list of the available service queues in the system. The table includes the service queue's name, number, if it uses multi-skill agent queuing (MSAQ) prioritization, and if it is a virtual service queue (VSQ).

Field	Description
Selected Queues	A list of the service queues selected to be part of the service queue group.

Adding a Service Queue Group

Follow these steps to add a new service queue group.

TASK

1. Click the Add button (+) at the bottom left of the window. The Add Service Queue Group dialog box appears.
2. Enter a name for the service queue group.
3. Assign a color to represent the service queue group.
4. Select the desired service queues from the Available Queues pane and use the arrow buttons to move them to the Selected Queues pane. You can select more than one queue at a time. You can type a string in the filter field below the pane to more easily locate a service queue in the list.
5. When you have completed all the fields, click Add.

Modifying a Service Queue Group

Follow these steps to modify an existing service queue group.

TASK

1. In the Service Queue Group Management window, double-click the name of the service queue group you want to modify. The Edit Service Queue Group dialog box appears.
2. Edit the fields as desired.
3. Click Save.

Deleting a Service Queue Group

Follow these steps to delete an existing service queue group.

TASK

1. In the Service Queue Group Management window, select the name of the service queue group you want to delete.

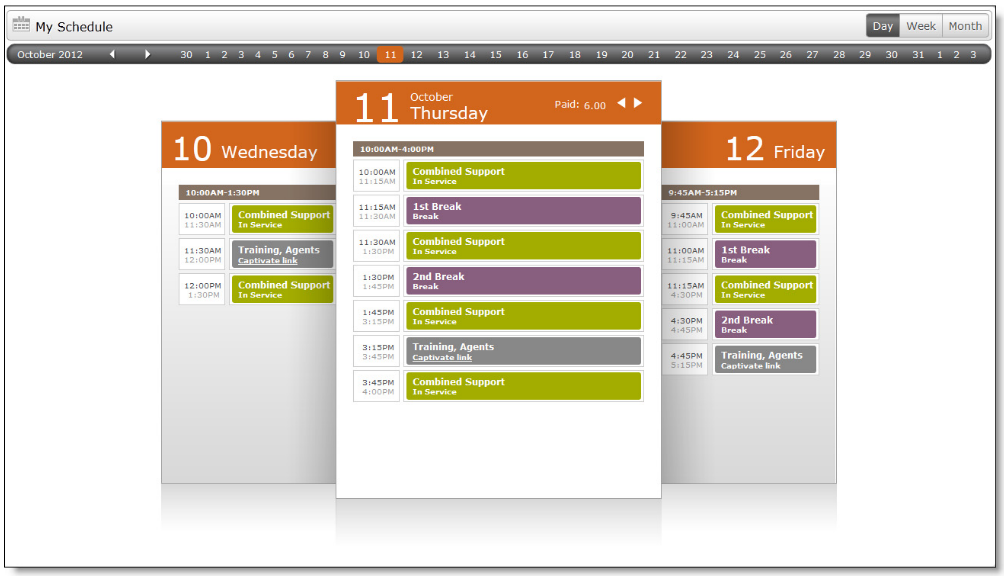
2. Click the Delete (—) button at the bottom left of the window.

3. Click Delete to confirm that you want to delete the selected service queue group.

My Schedule

The My Schedule application (Figure 20) allows you to view your schedule by day, week, or month.

Figure 20. My Schedule application (day view)



By default, the My Schedule application displays today's schedule in Day view in the time zone configured for you by the administrator. You can also view your schedule in Week and Month view for any date a schedule has been created.

If you are a supervisor, you can view your own schedule and the schedules for agents on your teams, and change the time zone a schedule is displayed in.

Activities are color-coded according to their types. The colors are configured by the administrator. For example, breaks might be displayed in purple and meetings in blue. The color-coding is visible on any schedule view you choose, either as background for the activity listing or as a stripe or square next to the activity.

My Schedule Views

The My Schedule toolbar (Figure 21) allows you to view your schedule by day, week, or month. The agent's toolbar is identical except that the Select Agent and Select Time Zone fields are not present.

Figure 21. My Schedule toolbar, calendar bar, and header (Week view)

Table 7 describes the My Schedule toolbar, calendar bar, and header functionality.

Table 7. My Schedule toolbar/calendar bar/header fields and buttons

Field	Description
Toolbar	
Select Agent	(Supervisors only) Select the agent from the drop-down list whose schedule you want to view. If you are an agent as well as a supervisor, your name is the default.
Select Time Zone	(Supervisors only) Select a time zone in which to view an agent's schedule. By default the schedule is displayed in your display time zone. See "Time Zone Considerations" on page 49 for a detailed explanation of time zones and how they relate to schedules.
Day/Week/Month	Click to select the schedule view desired. The default view is Day view for the current date. Click the left and right arrows to view schedules in the past or future, or select a specific day or month from the calendar bar.
Calendar Bar	
Day View/Week view	Click any specific date from the 5 weeks of dates displayed in the calendar bar to view the schedule for that date or the week that includes that date. Each date has a tooltip that names the day of the week. Click the left and right arrows to change the month displayed. The displayed date is highlighted in orange. Today's date is highlighted in black. In the Week view, details of each activity are displayed in a tooltip when you hover the mouse over the activity. The Day and Week views can also include a hyperlink related to the schedule activity. For example, if you are scheduled for e-learning, you click the hyperlink in the schedule to view the e-learning training website.

Field	Description
Month view	Click any month from the 12 months displayed to view the schedule for that month. Six weeks are displayed in Month view, starting with the week the first day of the selected month is in. Click the left and right arrows to change the year displayed. The displayed month is highlighted in orange. The current month is highlighted in black. The activities for each day's schedule are limited to four listed events. "More" appears at the bottom of the date square if there are more than four activities on that day. The entire schedule is summarized in a tooltip when you hover the mouse over the bar at the top of each calendar square.
Header	
Paid	The total paid hours scheduled on the displayed day, week, or month.
Time	(Week view only) Displays each day's schedule to show the length of each activity on an hourly grid. If a schedule crosses midnight, all activities after midnight are displayed on the next day.
Event	(Week view only) Displays each day's schedule as a list of activities. All activities for the shift are displayed on the day the shift starts, even if the shift crosses midnight into the following day. This view is recommended for printing a schedule.
Today	(Week and Month view only) Click to display the week or month that contains today's schedule.
Left/Right Arrows	Click to move you one day, one week, or one month back and forth in the schedule, depending on the view you are using.

Time Zone Considerations

All WFM users are assigned a display time zone by the administrator. The default setting is the time zone in which the WFM server is located (the server time zone). For a contact center with all locations in that same time zone, the default setting is likely used for all WFM users. However, if the contact center has locations in multiple time zones, users located in time zones other than the WFM server time zone can be assigned a user-specific display time zone so they see their schedules in local time.

For example, if the WFM server is located in Chicago in the Central Time zone, then the default server time zone is Central Time. Agent A is in Chicago so his display time zone is the default server time zone. However, Agent B is in Los Angeles, so her display time zone is set to Pacific Time, and Agent C is in New York City, so his display time zone is set to Eastern Time. All three agents see their schedules in their local time zone.

It is possible for users to see their schedules in a different time zone than where they are actually located. It all depends on how the administrator has configured their display time zones. As a result, the times shown in the My Schedule application and widget do not necessarily match the local time shown on your computer.

Supervisors also see their schedules and the schedules of the agents on their teams in the time zone assigned to the supervisor's user account. If a supervisor located in the Central Time zone views the schedule of an agent located in the Pacific Time zone, that agent's schedule will be shown in Central Time, because that is the supervisor's display time zone.

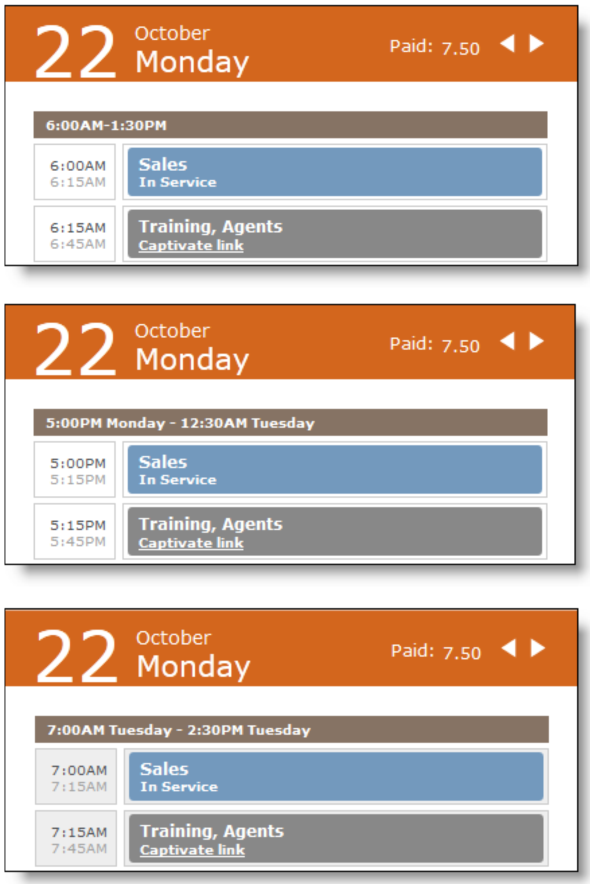
Supervisors can control which time zone is shown in My Schedule by changing it in the time zone drop-down list. A supervisor might want to see an agent's schedule as the agent sees it, especially if that agent is located far away from the supervisor and the time difference is more than a few hours. In that case, the supervisor selects the agent's local time zone from the time zone drop-down list.

> NOTE: The time zone shown in the Select Time Zone drop-down list is not the display time zone assigned to the user whose schedule is displayed in My Schedule. It only reflects the time zone chosen by the supervisor to view an agent's schedule. The only way you can know what is a user's display time zone is to look up the user's account settings in WFM Administrator.

It is important to note that when a supervisor changes the display time zone, only the time labels (the hours) on the displayed schedule change, and not the day/date labels. The day/date labels continue to reflect the supervisor's configured display time zone.

Figure 22 illustrates how a schedule changes depending on the time shift applied to it.

Figure 22. The same schedule viewed in different time zones



The same schedule viewed in three different time zones. Note that the day/date labels do not change, but the time labels do.

If the time shift forces the schedule onto another day, that fact is noted in the summary bar at the top of the schedule.

The day/date labels reflect the supervisor's configured display time zone. The time labels reflect the time zone selected by the supervisor to view the schedule.

The time zones shown are (top to bottom) –1100 GMT, GMT, and +1400 GMT.

Printing a Schedule

Use your browser's print functionality to print a schedule. The recommended view to print is the Week view set to show the daily schedules by event, not by time.

You might have to change the print default settings to achieve an optimal result (adjusting page orientation, margins, and so on). Consult your browser's documentation on how to work with the print settings.

Messaging

The Messaging application allows you to manage schedule requests.

Agents can request time off, exceptions, and schedule offers and trades with the other agents on the team in their view. They can also accept or reject schedule trades and offers, and edit their own requests.

Supervisors use Messaging to approve or deny agent requests.

Messaging for Agents

The Messaging application for agents consists of a menu for creating new requests and three mail boxes:

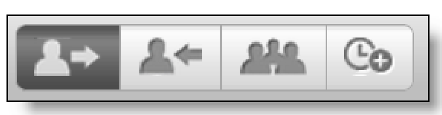
- The inbox, which contains all requests you receive
- The Outbox, which contains all requests you make
- The Public Box, which contains public schedule trades

The default view is the Outbox. Requests can be retained from 6 to 99 months, with the default retention period set to 13 months. You cannot delete requests from any mail boxes yourself. They are deleted by the system when they pass the configured retention period.

Request statuses change as the request makes its way through the system. It is important to periodically refresh the mail box so you see the latest statuses. Use standard browser page refreshing methods, such as pressing F5 or clicking the Refresh button on the browser toolbar. Note that the Outbox is displayed after the refresh, even if you were viewing the Inbox or Public Box.

Access your mail boxes by clicking the mail box's icon in the Messaging toolbar (Figure 23). From left to right, the icons are Outbox, Inbox, Public Box, and New Requests.

Figure 23. Messaging toolbar



Outbox

The Outbox ([Figure 24](#)) contains all requests you have made in ascending scheduled date order. You can view the details of a request, and edit or delete the request if it has not yet been approved or denied.

Figure 24. Outbox window

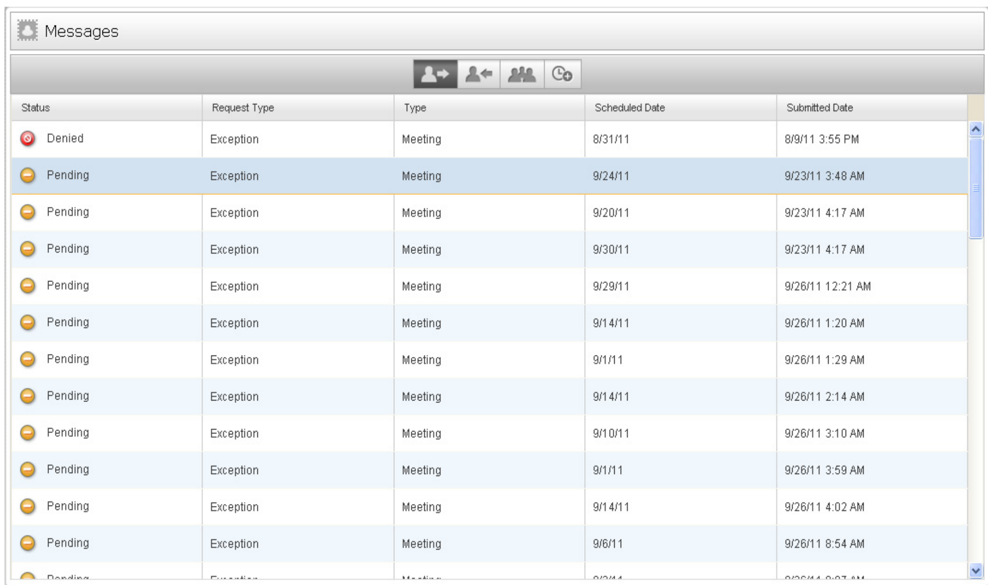


Table 8 describes the fields in the Outbox.

Table 8. Outbox fields

Field	Description
Status	The status of the request. Possible statuses are: • Approved. Your request was approved by your supervisor. • Pending. Your schedule trade or schedule offer request is waiting for a response from another agent. Can be edited or deleted. • Waiting. A schedule offer or schedule trade request is waiting for your response. Can be accepted or rejected. • Submitted. Your request is waiting for a response from your supervisor. Can be edited or deleted. • Denied. Your request was denied by your supervisor. • Error. Your request contains an error. • Refused. Another agent has refused your schedule trade request. • Rejected. You rejected another agent's schedule trade request.

Field	Description
Request Type	The general type of request: Exception, Offer, Trade, or Time Off.
Type	The specific type of request. For example, if the Request Type is Time Off, the Type might be Vacation.
Scheduled Date	The date that the exception, schedule trade, schedule offer, or time off occurs. By default, the Outbox is sorted by this date in ascending order. You can click the column header to toggle between ascending and descending order.
Submitted Date	The date and time when the request was submitted. Note that public trade offers do not display a submitted date until someone accepts them.

Working With Your Outbox

To view the details of a request:

- Double-click the request.

To edit a request that has not yet been approved or accepted:

1. Double-click the request to view the details.
2. Edit as desired.
3. Click Submit.

Inbox

The Inbox (Figure 25) contains all requests you have received in scheduled date order. You can view the details of a request, and edit or delete the request if it has not yet been approved or denied.

> **NOTE:** Supervisors have final authority over any schedule trades, so a trade you accept might be rejected by your supervisor.

Figure 25. Inbox window

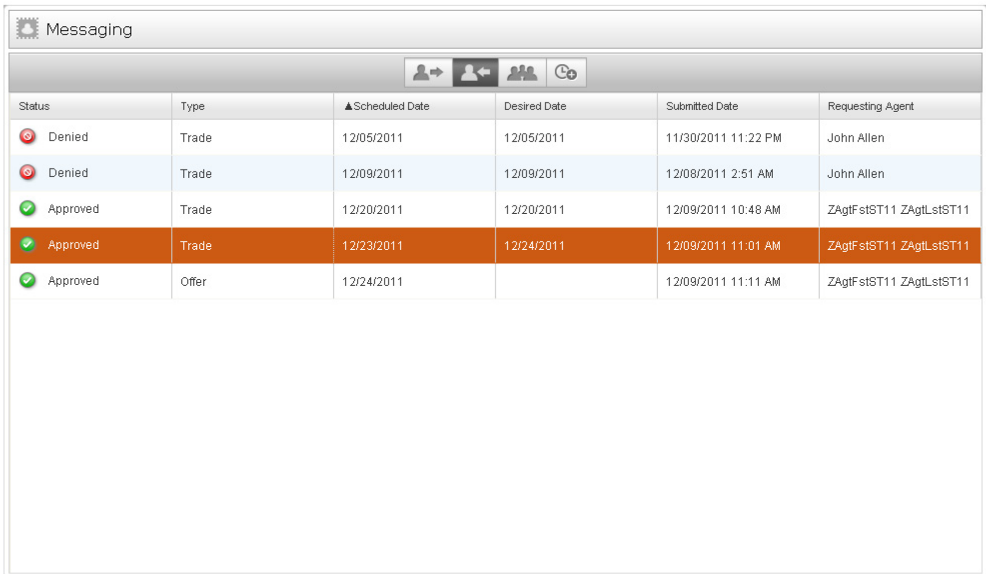


Table 9 describes the fields in the Inbox.

Table 9. Inbox fields

Field	Description
Status	The status of the request. Possible statuses are: • Approved. Your request was approved and your schedule updated accordingly. • Pending. An accepted request is waiting for a response from another agent. Can be edited or deleted. • Submitted. The request is waiting for a response from your supervisor. Can be edited or deleted. • To-Do. The request is waiting for a response from you. Can be accepted or rejected. • Denied. Your request was denied by your supervisor. • Error. There is an error in the request. • Refused. You refused another agent's schedule trade request • Rejected. Another agent rejected your schedule trade request.
Request Type	The general type of request: Exception, Offer, Trade, or Time Off.
Scheduled Date	The date that the exception, schedule trade, schedule offer, or time off occurs. By default, the Outbox is sorted by this date in ascending order. You can click the column header to toggle between ascending and descending order.
Desired Date	The date the requesting agent wants to receive (the Scheduled Date in a schedule offer request and schedule trade request).
Submit Date	The date and time when the request was submitted. Note that public trade offers do not display a submitted date until someone accepts them.
Requesting Agent	The name of the agent requesting a schedule trade or offer.

Working With Your Inbox

To accept or reject a schedule trade request:

1. Double-click the request to open it.
2. Click Analyze to compare your schedule to the requesting agent's schedule on the two days. This tells you if you are available to accept the trade.
3. Click Accept or Reject.

To confirm or reject a schedule offer request:

1. Double-click the request to open it.
2. Click Analyze to compare your schedule for the specified day with the offered schedule.
3. Click Confirm to accept the offer request, or Reject to deny the offer request.

Public Box

The Public box (Figure 26) contains all available public schedule offers and trades from the agents in your view. A public offer and trade are those that are available for any agent to accept. You can view the details of a request, evaluate the request, and then accept it if desired.

> **NOTE:** Supervisors have final authority over any schedule trades and offers, so a trade or offer you accept might be rejected by your supervisor.

Figure 26. Public box

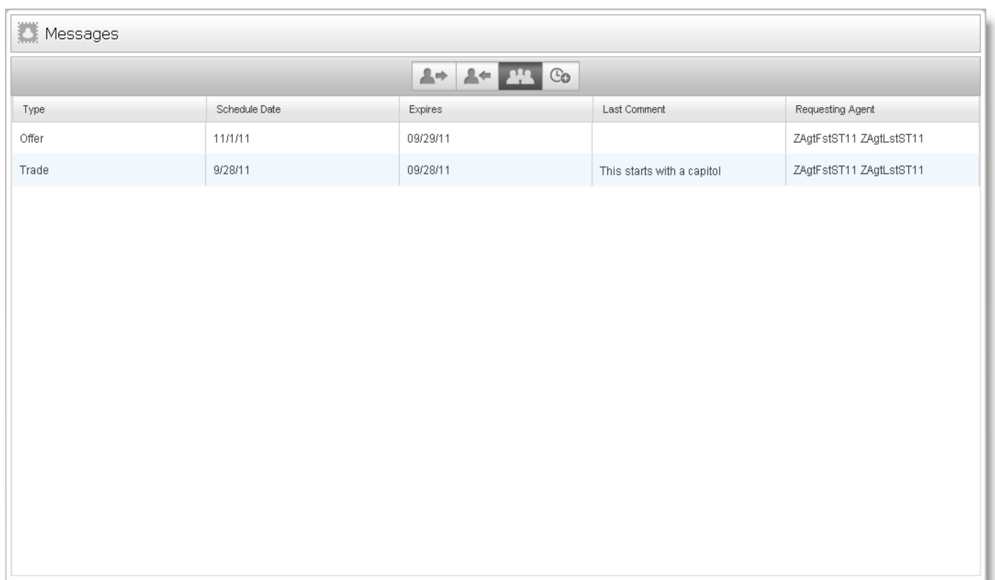


Table 10 describes the fields in the Public Box.

Table 10. Public fields

Field	Description
Request Type	The general type of request: Offer or Trade.
Schedule Date	The date that the requestor wants to give up. By default, the Public Box is sorted by this date in ascending order.

Field	Description
Expire Date	The date the request expires. The request expires at 23:59 of this date, after which you can no longer accept or cancel the request.
Last Comment	The last comment entered on the request.
Requesting Agent	The name of the agent requesting a schedule trade or offer.

Working With the Public Box

To accept a schedule trade request:

1. Double-click the request to open it.
2. Select a date you want to trade for the date in the request.
3. Click Analyze to compare the two schedules and ensure that your proposed date works.
4. Enter comments about your proposed date in the Comments field, if desired.
5. Click Accept.

To accept a schedule offer request:

1. Double-click the request to open it.
2. Click Analyze to compare your schedule for the specified day with the offered schedule.
3. Click Accept if you want to accept the offer, or Cancel to close the request without accepting it.

Requests

The New Request menu enables you to create a request for exceptions, time off, schedule offers, and schedule trades.

Requesting an Exception

Use an exception request (Figure 27) to request a change in your schedule for unplanned activities such as meetings, training sessions, unscheduled breaks, and absenteeism. Your request is sent to your supervisor for approval.

Exceptions can be requested for both future and past dates. Exceptions for past dates are used to correct your adherence percentage. For example, if you had to go home sick yesterday, your statistics would show you out of adherence because you did not follow your schedule. Requesting an exception for personal time off for the time you were out of the office corrects the schedule and your adherence percentage for that day.

Figure 27. Exception Request dialog box

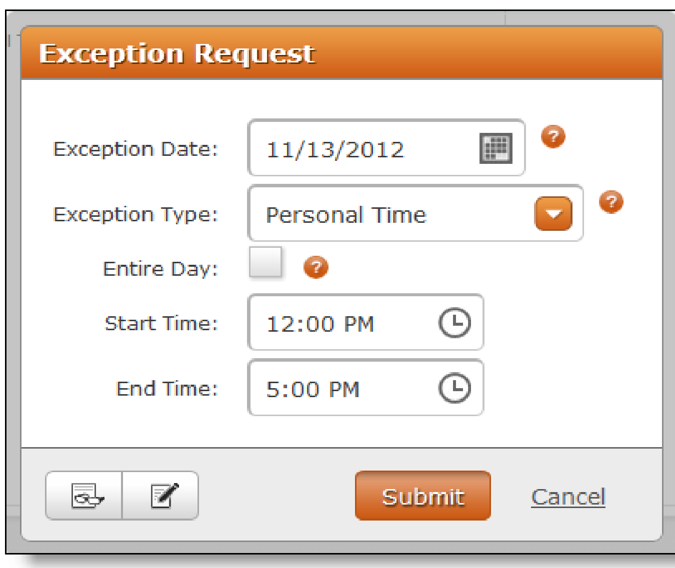


Table 11 describes the fields in the Exception Request dialog box.

Table 11. Exception Request fields

Field	Description
Exception Date	The date you want the exception to occur. The current date is shown by default.
Exception Type	Drop-down list of the available exception types.

Field	Description
Entire Day	Select the check box to indicate that the exception is for the entire day. When selected the Start Time and End Time fields are hidden.
Start Time	The time the exception starts.
End Time	The time the exception ends.
Write Comment	Click to enter an optional comment (maximum of 140 characters) regarding the exception request.

An exception request flows through the system as outlined in Table 12.

Table 12. Exception request flow

User	Action	Shows Up Here	Status
Agent A	Creates new request	Supervisor To Do Box	To-Do
Supervisor	Receives request	Supervisor To Do Box	Approved/Denied
Supervisor	Approves/denies exception	Agent A Inbox	Approved/Denied
		Supervisor All box	Approved/Denied

Creating a New Exception Request

To create a new exception request:

TASK

1. Click New Request and choose Exception Request from the menu.
2. Complete the fields.
3. Click Submit.

Requesting a Schedule Offer

Use a schedule offer request (Figure 28) to make a day you are scheduled to work available for another agent to work. For example, if you have an obligation away from work on Wednesday, you offer your shift to anyone else who can work that day. The schedule offer is posted to the Public Box of all agents in your view.

Figure 28. Schedule Offer Request dialog box

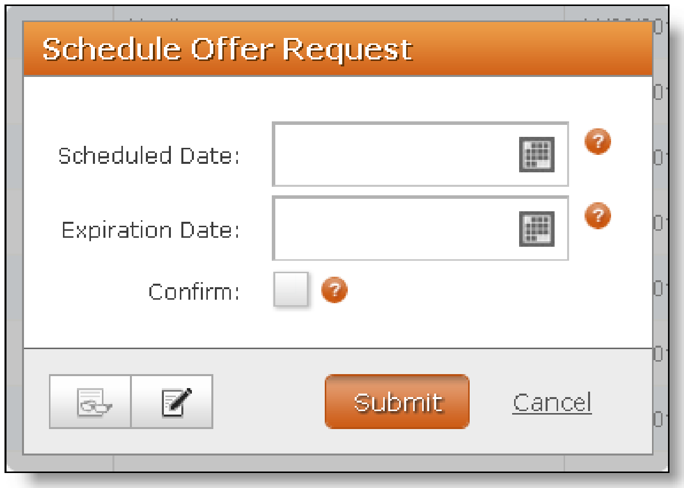


Table 13 describes the fields in the Schedule Offer Request dialog box.

Table 13. Schedule Offer Request fields

Field	Description
Scheduled Date	The date you want to offer to other agents to work. By default it displays tomorrow's date. You cannot choose a date in the past.
Expiration Date	The date your request expires. At that time it no longer appears in your Outbox or in the Public Box. The expiration date must be before the Scheduled Date.
Confirm	Select this check box if you want to confirm an agent's acceptance of the offer before it is sent to your supervisor for approval.

A schedule offer request without confirmation flows through the system as outlined in Table 14.

Table 14. Schedule offer request without confirmation flow

User	Action	Shows Up Here	Status
Agent A	Creates new request	Agent A Outbox	Pending
All agents	Receive offer	Agents' Public Box	None
Agent B	Accepts offer	Agent B Inbox	Submitted
		Agent A Outbox	Submitted
Supervisor	Receives accepted offer	Supervisor To-Do Box	To-Do
Supervisor	Approves/denies offer	Supervisor All Box	Approved/Denied
		Agent A Outbox	Approved/Denied
		Agent B Inbox	Approved/Denied

A schedule offer request with confirmation flows through the system as outlined in Table 15.

Table 15. Schedule offer request with confirmation flow

User	Action	Shows Up Here	Status
Agent A	Creates new request	Agent A Outbox	Pending
All agents	Receive offer	Agents' Public Box	None
Agent B	Accepts offer	Agent B Inbox	Pending
Agent A	Receives accepted offer	Agent A Outbox	To-Do
		Agent B Inbox	Pending

User	Action	Shows Up Here	Status
Agent A	Confirms/rejects offer	Agent A Outbox	Submitted/Denied (Rejecting the request creates a copy of the request that shows Denied on it and the original request goes back to Pending)
		Agent B Inbox	Submitted/Denied
Supervisor	Receives accepted offer	Supervisor To-Do Box	To-Do
		Supervisor All Box	Approved/Denied
		Agent A Outbox	Approved/Denied
		Agent B Inbox	Approved/Denied

Creating a New Schedule Offer Request

To create a new schedule offer request:

TASK

1. Click New Request and choose Schedule Offer Request from the menu.
2. Complete the fields.
3. Click Submit.

Requesting a Schedule Trade

Use the schedule trade request (Figure 29) to trade a scheduled work day with someone else's scheduled work day. These trade requests can be with a specified agent (a private trade) or with any agent in your view (a public trade). You can ask to trade shifts on the same day (for example, you might want to trade your 7 am-3 pm shift with someone else's 10 am-6 pm shift) or for different days (for example, you might want to trade your Monday off for a Friday off).

Figure 29. Trade Request dialog box

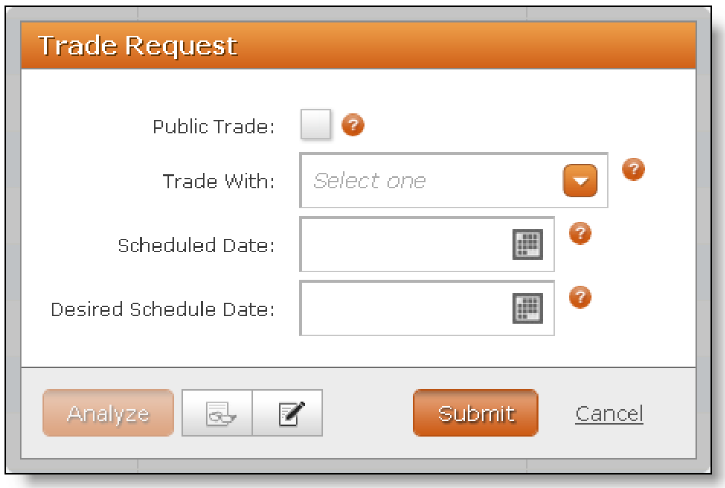


Table 16 describes the fields in the Trade Request dialog box.

Table 16. Trade Request fields

Field	Description
Public Trade	Select this check box to post your schedule trade in the Public Box of all agents in your view.
Confirm	(Public trades only) A reminder that you will be asked to confirm or reject a proposed trade from the replying agent. This check box is read-only and cannot be cleared.
Trade With	(Private trades only) Select the name of the agent with whom you want to trade schedules.
Scheduled Date	The date you want to trade. By default it displays tomorrow's date.
Desired Schedule Date	(Private trades only) The date you want to trade for. By default it displays tomorrow's date.

A private schedule trade request flows through the system as outlined in Table 17.

Table 17. Private schedule trade request flow

User	Action	Shows Up Here	Status
Agent A	Creates new request	Agent A Outbox	Pending
Agent B	Receives trade request	Agent B Inbox	To-Do
Agent B	Accepts/refuses trade request	Agent B Outbox	Submitted/Denied
Agent A	Receives Agent B's answer	Agent A Inbox	Submitted/Denied
Supervisor	Receives accepted trade request for approval	Supervisor To Do Box	To-Do
Supervisor	Approves/denies trade	Agent A Outbox	Approved/Denied
		Agent B Inbox	Approved/Denied
		Supervisor All Box	Approved/Denied

A public schedule trade request flows through the system as outlined in Table 18.

Table 18. Public schedule trade request flow

User	Action	Shows Up Here	Status
Agent A	Creates new request	Agent A Outbox	Pending
All Agents	Sees trade in Public Box	Agents' Public Box	None
Agent B	Accepts trade request	Agent B Inbox	Pending
Agent A	Receives Agent B's answer	Agent A Outbox	To-Do

User	Action	Shows Up Here	Status
Agent A	Confirms/rejects Agent B’s acceptance	Agent A Outbox	Submitted/denied (Rejecting the request creates a copy of the request that shows Denied on it and the original request goes back to Pending)
	Agent B receives Agent A’s confirmation/rejection	Agent B Inbox	Submitted/denied
Supervisor	Receives accepted and confirmed trade request for approval	Supervisor To-Do Box	To-Do
Supervisor	Approves/denies trade	Agent A Outbox	Approved/Denied
		Agent B Inbox	Approved/Denied
		Supervisor All Box	Approved/Denied

Creating a New Schedule Trade Request

To create a new schedule trade request:

TASK

1. Click New Request and choose Schedule Trade Request from the menu.
2. Complete the fields.
3. If this is a private trade, click Analyze to compare your schedule on the proposed trade date with that of the person with whom you want to trade to make sure that the trade is possible.
4. If desired, click Write Comment and enter a comment.
5. Click Submit.

Editing or Deleting a Request

Requests can be edited or deleted in certain situations. Table X describes when you can edit or delete a request.

Table 19. When requests can be edited or deleted

Request Type	Status	Action Allowed
Schedule Offer (public)	Pending	Edit, Delete
Schedule Trade (private)	Pending	Edit
Schedule Trade (public)	Pending	Edit, Delete
Exception	Submitted	Edit, Delete
Time Off	Submitted	Edit. Delete

Editing a Request

TASK

1. Double-click the request to open it.
2. Edit the request as desired.
3. Click Submit.

Deleting a Request

TASK

1. Double-click the request to open it.
2. Click Delete.

Supervisor Messaging

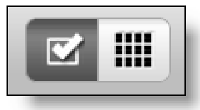
The Messaging application for supervisors consists of two mail boxes:

- The To-Do Box, which displays all requests that require action from you (the default view)
- The All Box, which contains all requests sent to you

Requests can be retained from 6 to 99 months in the All Box, with the default retention period set to 13 months.

Access your mail boxes by clicking the mail box's icon in the Messaging toolbar (Figure 30). From left to right, the icons are the To-Do Box and the All Box.

Figure 30. Supervisor's Messaging toolbar

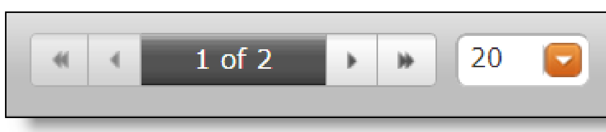


NOTE: Supervisors who are also agents have a dual mailbox, one with the agent's view and one with the supervisor's view. You can switch between the two views using the My Requests and All Requests buttons. Click My Requests to see the agent mailbox, and All Requests to see the supervisor mailbox.

Navigating in your Mailboxes

To the right of the mailbox toolbar are the page view controls (Figure 31). These controls help you navigate through the multiple pages of your mailboxes.

Figure 31. Page view controls



Use the single and double arrows to move back and forward one page at a time or to the beginning or end page in the mailbox. Control the number of requests displayed in one page using the drop-down list at the right. Note that you can select one of the standard numbers (20, 40, 60, or 80) or enter your own number from 1 to 999.

Jump to a specific page by clicking on the dark gray center of the controls. This brings up a field you can type a page number in, for example "5" to jump to page 5 of 10.

Approving or Denying Requests

Requests that require your approval appear in your To-Do Box. Once you have approved or denied a request, it is removed from your To-Do Box. All requests that you have received are archived in your All Box.

Exception Requests

The Approve Exception Request dialog box (Figure 32) enables you to approve or deny an agent's exception request.

Figure 32. **Approve Exception Request dialog box**

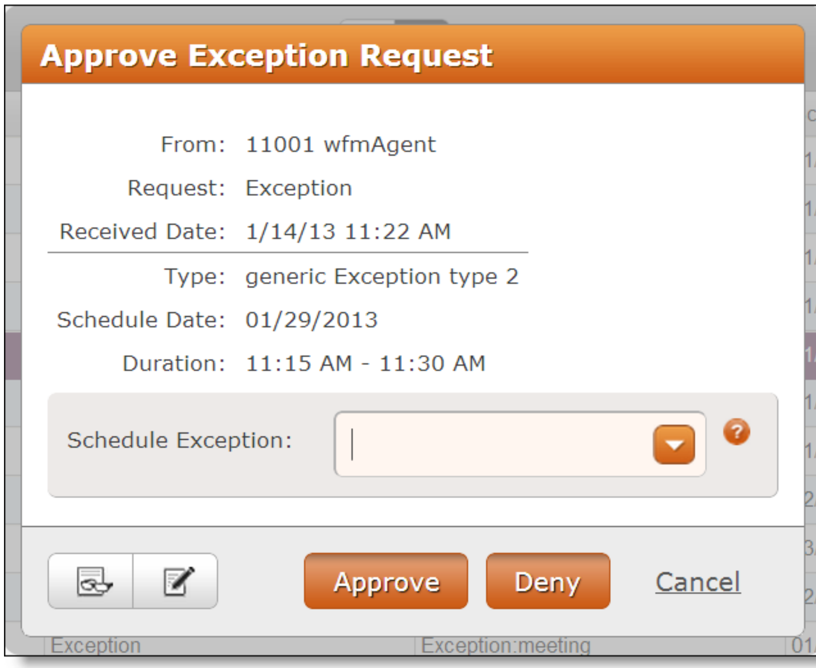


Table 20 describes the fields in the Approve Exception Request dialog box.

Table 20. Approve Exception Request dialog box fields

Field	Description
From	The name of the agent requesting the exception.
Request	The type of request.
Received Date	The time and date you received the request. This is the same time and date the agent submitted the request.
Type	The type of exception, as chosen by the agent.
Scheduled Date	The date of the exception.
Duration	The duration of the exception.
Schedule Exception	Select the exception type description that will appear in the schedule if the exception is approved.

Approving or Denying an Exception Request

To approve or deny an exception request:

TASK

1. In the To-Do Box, double-click the request to open it.

2. If approving the request, select the appropriate schedule exception from the drop-down list. This is what appears in the schedule. Click Read Comments if any comments are attached to the exception request.

3. Click Approve or Deny.

Approve Trade or Offer Request

The Approve Trade Request dialog box (Figure 33) allows you to analyze, and then approve or deny a trade request or an offer request.

> NOTE: If another supervisor approves a trade request using the legacy application, you will not be informed.We recommend that you approve trade requests using the Messaging application.

Figure 33. Approve Trade Request

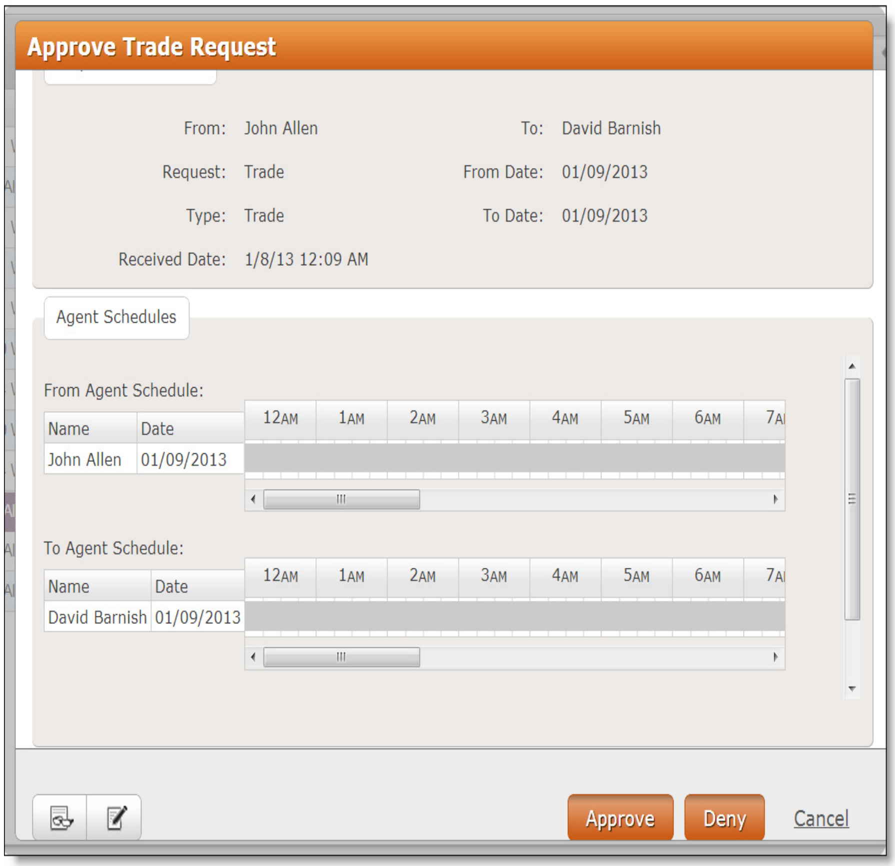


Table 21 describes the fields in the Approve Trade Request dialog box.

Table 21. Approve Trade Request fields

Field	Description
Request Information	
From	The name of the agent who requested the time off.

Field	Description
Request	The Trade high-level request type. The agent requested time off.
Type	The type of trade request.
Received Date	The date and time the request was submitted.
To	The name of the other agent involved in the trade.
From Date	The first scheduled date involved in the trade.
To Date	The second scheduled date involved in the trade. This field only appears when different days are involved in the trade request.
From Agent Schedule	The schedule for the agent requesting the trade. Use the scroll bar to view the agent's entire schedule.
Name	The name of the agent.
Date	The date specified in the trade request.
To Agent Schedule	The schedule for the agent accepting the trade.

Approving or Denying a Schedule Trade or Offer Request

To approve or deny a schedule trade or offer request:

TASK

1. In the To-Do Box, double-click the request to open it.
2. Use the Agent Schedules section to analyze the two schedules to make sure they can be traded. Click Read Comment if any comments are attached to the trade or offer request.
3. Click Approve or Deny.

Agent Schedules

The Agent Schedules application (Figure 34) allows supervisors to manage the schedule for selected agents by updating the production schedule.

The process of scheduling agents for non-service activities such as meetings or training, after a schedule has been generated is called post-production planning. You can use the Agents Schedules application to find times when you can schedule agents for activities so that the service level is least affected.

Use the Agent Schedules application to complete the following tasks.

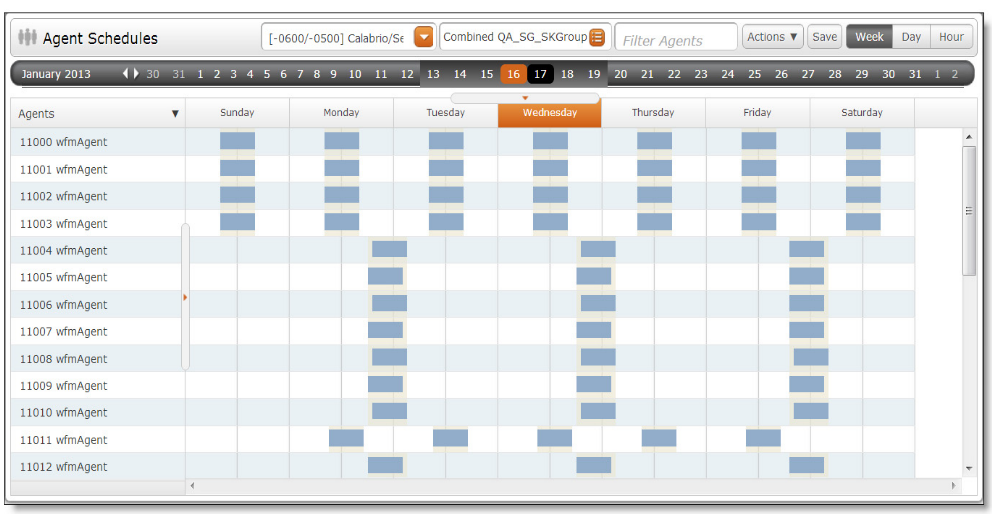
- Determine the best time to schedule an activity so that it has the least impact on the service queue, team, skill mapping, or agent and insert the activity
- Trade schedules between agents
- Update the production schedule
- Monitor real time adherence

Only supervisors can access the Agent Schedules application.

> NOTE: If another supervisor modifies agent schedules through the legacy application, you will not be informed. We recommend that you modify agent schedules using the Agent Schedules application.

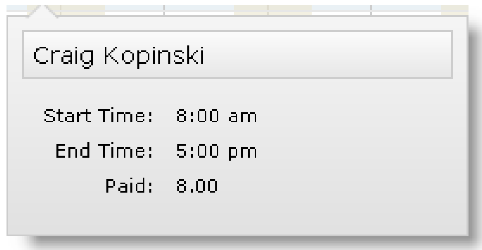
You can edit schedules only for the agents who are assigned to a team in your Main View. Agents who are not assigned to a team in your Main View are read only and show a lock icon next to their names.

Figure 34. Agent Schedules application



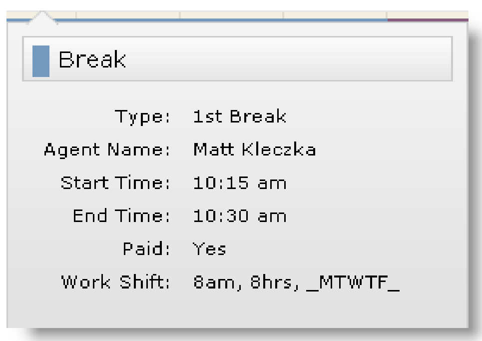
A popup (Figure 35) appears when you hover over a schedule in the Agent Schedules window for the Day or Week option. The popup identifies the agent, the agent's start and end time, and whether or not the agent was paid.

Figure 35. Popup for Day or Week



A popup (Figure 36) appears when you hover over an scheduled activity in the Agent Schedules window for the Hour option. The popup identifies the type of activity, the agent associated with the activity, the start and end time, whether or not the activity is paid, and the work shift.

Figure 36. Popup for Hour



NOTE: Sometimes the popup appears to show an incorrect start or end time for the activity. The reason for this is that activities are in two layers. The bottom layer in the schedule display is used for in service, overtime, assignment and closed service activities. The upper layer is used for breaks, lunches, projects, and exceptions. If you hover over a bottom layer activity, the popup shows the full length of time of that activity without taking into consideration any upper layer activities that might be on top of it.

Points to Remember

When using the Agent Schedules application, remember the following points:

- When you first access the application the fields are empty.
- Changes to the date and zoom level (Week, Day, or Hour) persist from session to session. To display the current date, choose Actions > Go to Today.
- Changes to the service queue, team or skill mapping persist to from session to session.
- The Agent Schedules application displays two activity start times based on the your time zone preference and the server's time zone. If you do not make a time zone selection, only server time is shown.

Agent Schedules Toolbar

Figure 37 displays the Agent Schedules toolbar.

Figure 37. Agent Schedules toolbar

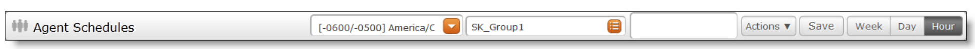


Table 22 describes the buttons that appear in the Agent Schedules toolbar.

Table 22. Agent Schedules toolbar fields

Field	Description
Select Time zone	Choose your time zone preference from the drop-down list. The server's time zone appears in this field by default. When you change this value your selected time zone appears in the Time Zone row. The server's time zone appears in the Agents row.
Select Criteria	Choose the service queue group, service queue, team, or skill mapping to display those agents' schedules. You can type the characters in the group name in the field to find it more easily. This field is not case sensitive. Your selection persists until you change it.
Filter Agents	Filter agents by typing letters in an agent's name. For example, if you type "br" in the field, only names that contain the letters "br" are displayed. This field is not case sensitive.

Table 23 describes the buttons that appear in the Agent Schedules toolbar.

Table 23. Agent Schedules toolbar buttons

Button	Description
Actions	Allows you to modify agents' schedules. You can choose from the following options: • Insert Activity—allows you to add an activity to the agents schedule. • Trade Schedule—allows you to trade schedules between two agents. • Go to Today—takes you to today's schedule. • Discard Changes—discards your unsaved changes and refreshes the Agent Schedule window.
Save	Saves the changes to the database and updates the production schedule.
Week/Day/Hour	Displays the agent schedules by week, day, or hour.

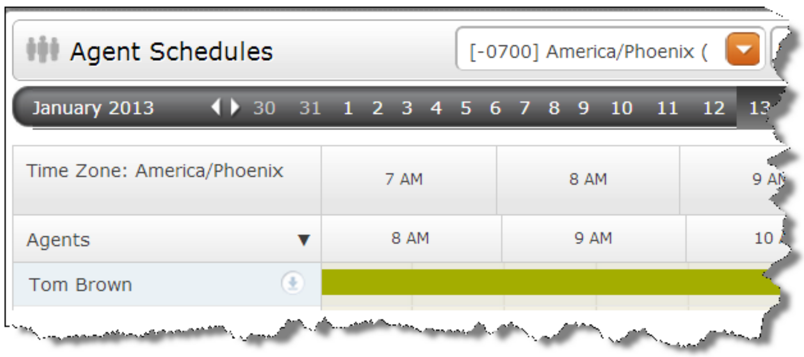
Time Zones

By default, the Agent Schedules page displays schedules in the server time zone. However, if you select a time zone from the Time Zone drop-down list that is different from the server time zone, a row is added to the schedule grid showing that time zone as well.

For example, Figure 38 shows a schedule in which the America/Phoenix time zone has been selected. A row labeled with the time zone name has been added to the schedule grid above the row showing schedule times in the server time zone.

The time zone row is the only place times in that time zone are displayed. Elsewhere in the schedule, such as in popup windows, server time is used.

Figure 38. Time zone rows in the schedule grid



Sorting the List of Agents

Use the triangle icon in the Agents column header to control how the agents are sorted in the schedule grid. You can sort agents in ascending order by the following:

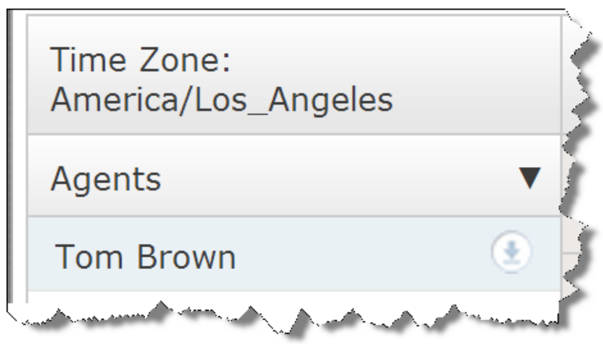
- First name
- Last name
- Arrival time. Agents are sorted according to the first scheduled activity on the schedule, and then by first name and last name. Agents who are available but not scheduled are listed after scheduled agents, and agents who are unavailable and not scheduled are listed last.
- Rank. Agents are sorted based on their ranking in the skill mapping as assigned in the WFM legacy application. Agents of equal ranking are then sorted by first name.
- Company start date. Agents are sorted by their seniority in the company, with the least senior listed first.

- Department start date. Agents are sorted by their seniority in the department, with the least senior listed first.

The list of agents can be further refined by pinning an agent to the top of the list. When an agent is pinned, the agent is not subject to any sorting and always appears at the top of the list of agents in the schedule.

You pin an agent by hovering your mouse over the agent's name, and then clicking the pin icon that appears at the right side of the cell (see Figure 39). To unpin the agent, click the icon again and the agent is immediately subject to the sorting method used in the list of agents.

Figure 39. Pinned agent

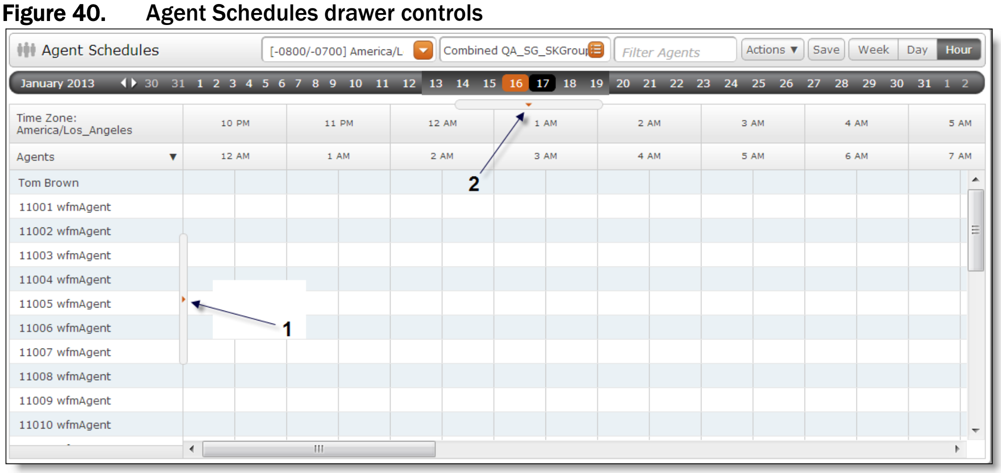


Drawers

A drawer is a pane that is opened and closed by clicking a control in the Agent Schedules window (Figure 40). There are three drawers available:

- Agent Adherence Detail drawer, displayed by clicking an agent's name in the Agents list
- Adherence drawer, displayed by clicking the arrow control 1 to the right of the Agents list
- Coverage drawer, displayed by clicking the arrow control 2 below the calendar bar

Figure 40. Agent Schedules drawer controls



Adherence Details Drawer

The Adherence Details drawer (Figure 41) is opened and closed by clicking an agent's name in the Agents list. It shows how well the agent has maintained schedule adherence since the start of the day. Adherence is calculated using agent state data captured from the ACD in real time. For this reason, the values displayed at the top of the Adherence Details drawer (Scheduled Total, Scheduled In Service, Action In Service, and Out of Adherence) reflect the data at the time you opened the drawer, and might differ from the values shown in the detail portion. You can refresh the data in the drawer by closing it and then reopening it.

You can use the Adherence Details drawer to:

- Compare the agent's scheduled activities with real-time statistics about the agent from the ACD.
- Interpret adherence statistics

Figure 41. Adherence Details drawer

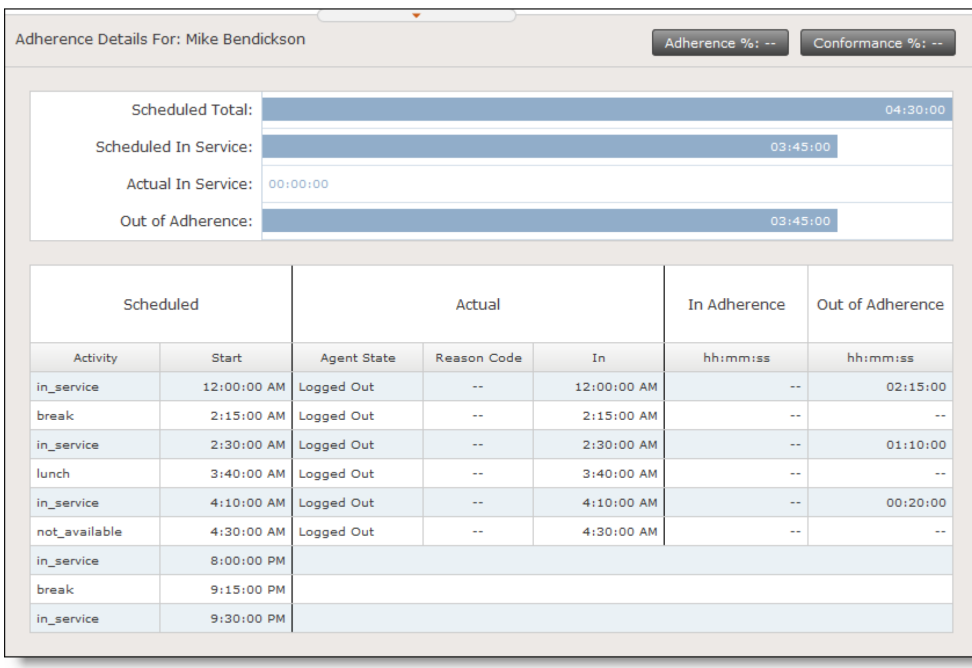


Table 24 describes the Adherence Details drawer fields.

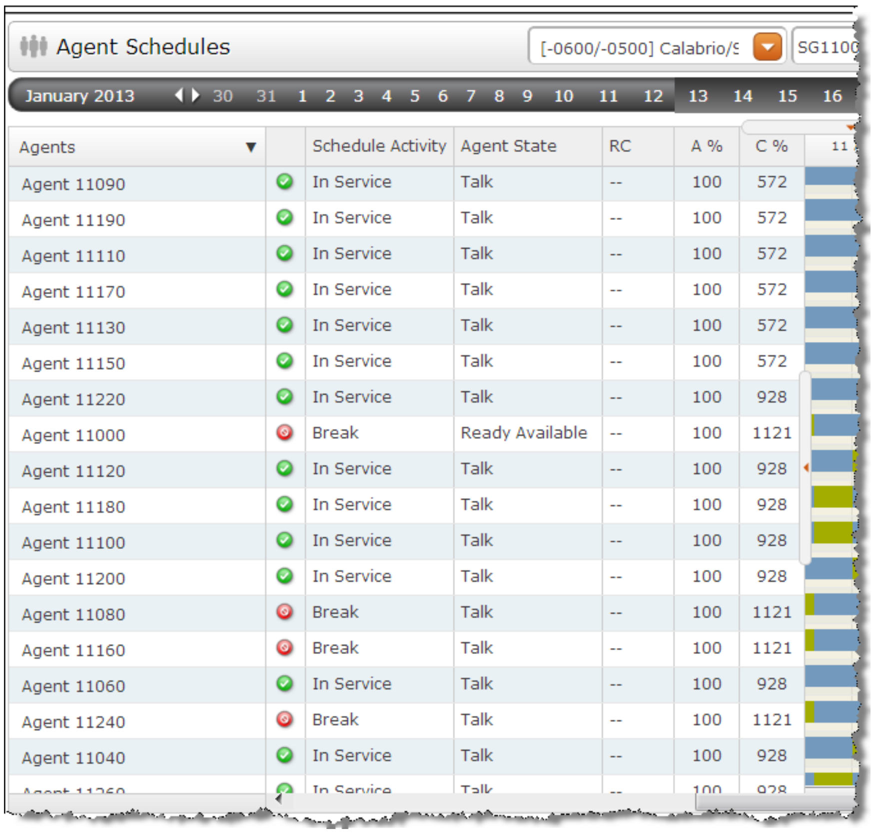
Table 24. Adherence Details drawer fields

Column	Description
Adherence %	The agent's adherence score. The percentage value is updated every millisecond and displayed as a decimal value. NOTE: This value might differ from the A% value in the Adherence drawer because each drawer refreshes at a different rate, and because the values are rounded in the Adherence drawer.
Conformance %	The agent's conformance score. The percentage value is updated every millisecond and displayed as a decimal value. NOTE: This value might differ from the C% value in the Adherence drawer because each drawer refreshes at a different rate, and because the values are rounded in the Adherence drawer.
Scheduled Total	The total time the agent is scheduled to work for the selected date. If the selected date is the current date, the value is calculated to the current time. This value includes only paid time, not unpaid time.
Scheduled In Service	The total time the agent is scheduled to be in service and available to handle calls for the current date so far. When agents are in service they are either ready to handle a call or handling a call.
Actual In Service	The total time the agent is ready or handling calls so far for the current date.
Out of Adherence	The total time the agent is out of adherence so far for the current date.
Scheduled	A list of scheduled activities and their start times for the selected day.
Actual	• Agent State—The agent's state from the ACD. • Reason Code—The reason code associated with the Out of Service and Not Ready states. • In—The time when the agent entered the agent state.
In Adherence	The time in adherence for each agent state. If the selected date is the current date, the value is calculated to the current time.
Out of Adherence	The time out of adherence for each agent state. If the selected date is the current date, the value is calculated to the current time.

Adherence Drawer

The Adherence drawer is opened and closed by clicking the arrow control to the right of the Agents list. It displays the real-time agent data and adherence and conformance percentages for the agents in the Agents list. When displayed, the data is refreshed every 30 seconds.

Figure 42. Adherence drawer



WFM collects real-time agent state data from the ACD and compares it with the agent schedules to calculate the adherence and conformance percentages.

> NOTE: The adherence and conformance percentages in the Adherence drawer are updated every 30 seconds and rounded up to a whole number. These percentages might be different than the percentages displayed in the Adherence Details drawer because each drawer refreshes at a different rate, and the Adherence Details drawer displays the adherence and conformance percentages as a decimal instead of a whole number.

Table 25 lists the fields in the Adherence drawer.

Table 25. Adherence drawer fields

Field	Description
Agents	The agent's name.
Schedule Activity	The agent's current scheduled activity.
Agent State	The agent's ACD agent state.
RC	The reason code (if any) associated with the agent's ACD state.
A %	The agent's adherence percentage. Adherence is the percentage of time that agents follow their schedules. When calculating adherence, WFM considers scheduled arrival and departure times, breaks, lunches, and time spent on scheduled activities, and compares the actual activity to the scheduled activity each millisecond through the work shift. For example, an agent who is scheduled to be in service at 09:00 and log out at 16:00, and who sticks to that schedule for the entire day, is 100 percent in adherence. Adherence is calculated by the following formula: [(configured schedule adherence minutes minus minutes not in adherence) divided by configured schedule adherence minutes] times 100 Where "configured schedule adherence minutes" is the sum of time scheduled for activities for which the Calculate Adherence column in the Application Management application is set to Yes. **NOTE:** If the formula produces a negative number, the field displays a zero.
C %	The agent's conformance percentage. Conformance is the percentage of time an agent works the right amount of time regardless of the time of day the agent works. Schedule conformance does not take arrival and departure times into account. For example, an agent who is scheduled to work from 08:00 to 16:00m but instead works from 10:00 to 18:00 would be conforming, but not adhering, to the schedule. Conformance is calculated according to the following formula: (total time an agent is in a ready, talk, hold, or work state) divided by (total scheduled in-service time) times 100 In-service time does not include lunch, breaks, projects, or exceptions.

Coverage Drawer

The Coverage drawer is applicable only to service queues. It is opened and closed by clicking the arrow control below the calendar bar.

The Coverage drawer has four views:

- Coverage: Scheduled (default view)
- Coverage: Shrinkage
- Coverage: Reforecast
- Intraday: Data

You can use the Coverage drawer to see how WFM predicts what the service queue will do for each day and interval. It shows you if your forecast is accurate when compared to the production schedule, and allows you to make post-production schedule changes.

> NOTE: The service level data in all coverage pages are calculated using daily totals in the Hour and Day views, and weekly totals in the Week view.

Based on the metrics displayed in the Coverage drawer, you can edit the schedule to improve the overall service level goal. For example, you could reschedule an agent's break to occur 30 minutes later to resolve a staffing issue. This schedule flexibility can make a big difference towards maintaining the daily service level goal.

The metrics in this drawer update automatically when you change the production schedule.

You can choose what information is displayed in a coverage charge by clicking the metrics buttons at the left of the chart on and off. You can tell if a button has been turned on if the button's border changes from gray to orange.

A popup (Figure 43) appears when you click a bar in any of the coverage drawers. The information in the popup is detailed in Table 26.

Figure 43. Coverage popup

Table 26. Coverage chart popup fields

Field	Description
Forecast	The number of agents and service level percentage forecasted for the interval.
Scheduled	The number of agents and service level percentage scheduled for the interval.
Actual	The actual number of agents and service level percentage for the interval.
Shrinkage	The number of agents after shrinkage is applied to the number of scheduled agents and the service level percentage expected for that number of agents.
Reforecast	The reforecasted number of agents based on the reforecasted number of contacts and reforecasted average handle time given the desired service level goal (percent and seconds).
% SVL Goal	The service level percentage goal.
% Shrinkage	The shrinkage percentage applied to the interval
% Reforecast	The reforecast service level percentage.

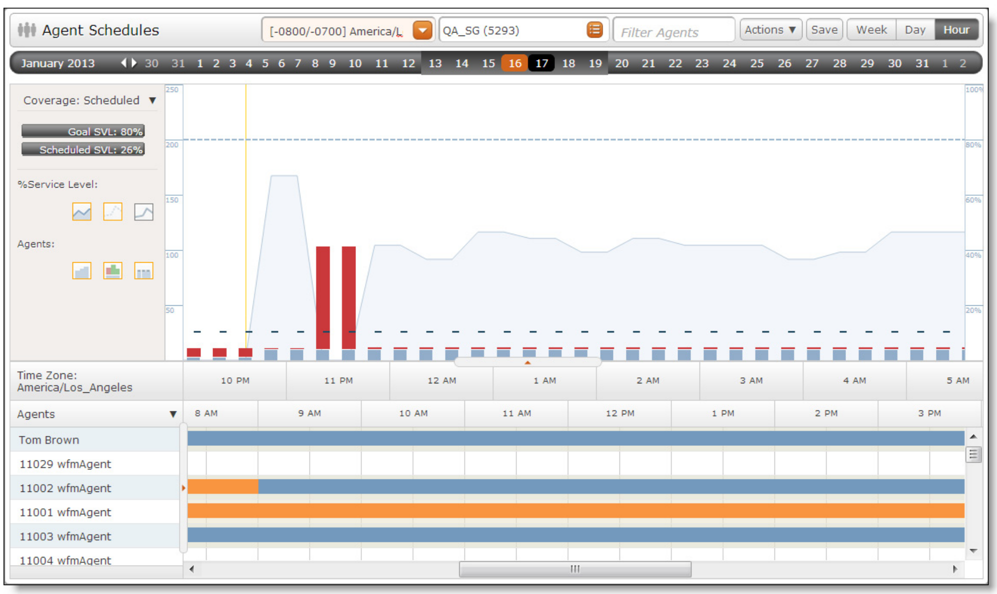
Coverage: Scheduled View

The Coverage: Scheduled view is the default view in the Coverage drawer. It shows how well the service queue is meeting its service level goal by comparing real-time data to the production schedule.

The chart can display any or all of following metrics by clicking the appropriate metric buttons on and off:

- % service level scheduled
- % service level goal
- % service level actual
- Agents scheduled
- Agents forecast
- Agents actual

Figure 44. Coverage drawer (Coverage: Scheduled option)



Interpreting the Chart

The Coverage: Scheduled view chart displays a stacked bar and line graph for a specific day. The bars and lines are color-coded to aid in interpretation. Each bar represents a 15-minute interval.

Table 27 describes the colors used in the stacked bar for each interval.

Table 27. Agent gap color key

Color	Agents Scheduled
Light Blue	Number of agents scheduled.
Dark Blue	Actual number of agents required.
Red	Number of agents forecasted indicates there is a shortage of agents.
Green	Number of agents forecasted indicates there is a surplus of agents scheduled.

To determine the least disruptive time to insert an activity, compare the Agents Scheduled to Agents Forecast in the chart. You can use the gap to determine the number of agents who are available for the planned activity without affecting the coverage.

If there are extra agents available, you can schedule an activity without affecting the service level goal. For example, if the interval from 10:30 to 11:00 has a surplus of 4 agents scheduled, you can schedule a 30-minute meeting with 4 agents during that time.

If there are fewer agents scheduled than the forecast requires, you need to change the agents' schedules to fulfill the schedule requirement.

Table 28 describes the lines used to represent the different service levels. The chart displays the scheduled, goal, and actual service level score. You can compare the actual service level scores to the service level scheduled and service level goal to see what exactly is happening in the contact center. The chart shows how closely the contact center achieved its service level goal.

Table 28. Service Level line key

Line	Service Level
Light blue line	% Service Level Scheduled
Dashed blue line	% Service Level Goal
Dark blue line	% Service Level Actual

Coverage: Shrinkage View

The Coverage: Shrinkage view shows the effect of shrinkage on the schedule's ability to meet the service level. You can adjust the shrinkage percentage to see how that affects meeting the service level goal.

The chart can display any or all of following metrics by clicking the appropriate metric buttons on and off:

- % service level shrinkage
- % service level goal
- % service level actual
- Agents shrinkage
- Agents forecast
- Agents actual

Figure 45. Coverage: Shrinkage view

The % Shrinkage field always shows the configured shrinkage percentage, whether the schedule was run with shrinkage applied or not. If a schedule is run with no shrinkage or with shrinkage rates set to 0, and then the shrinkage percentage is changed after the fact, then the current shrinkage percentage is displayed.

You can adjust that percentage up and down to see how those changes impact the schedule, and use that information to decide if the schedule needs to be adjusted so that the service level goal is met.

To adjust the shrinkage percentage, do the following:

1. In the % Shrinkage field, use the up and down arrows to change the shrinkage percentage to a new value.
2. Click anywhere in the chart to apply the new shrinkage percentage to each interval. The chart updates to reflect the new shrinkage percentage.

The % Shrinkage value reverts to the default value when you refresh the window. You cannot save the revised shrinkage percentage,

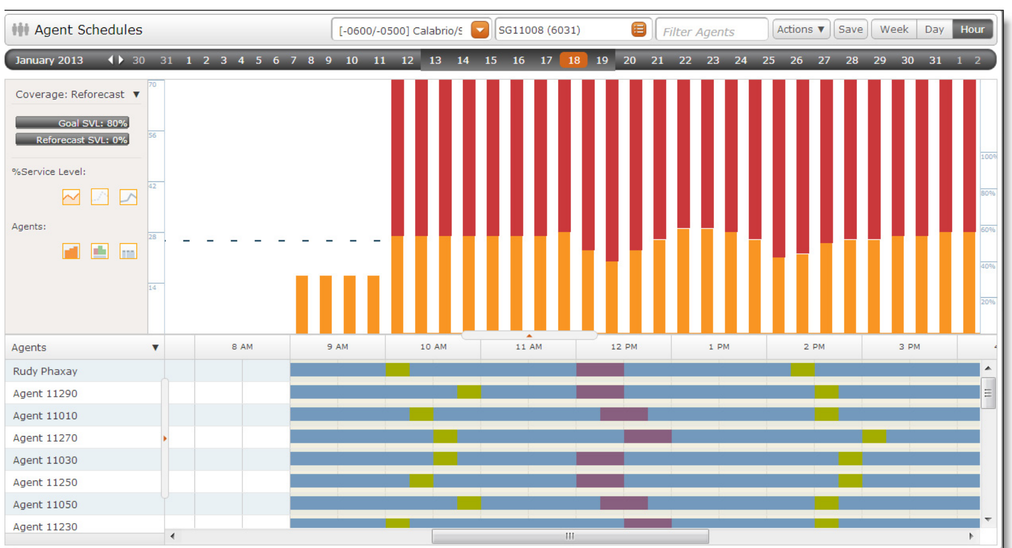
Coverage: Reforecast View

The Coverage: Reforecast view shows the impact of reforecast metrics on the coverage data so that schedules can be edited based on what the reforecast metrics say might happen.

The chart can display any or all of following metrics by clicking the appropriate metric buttons on and off:

- Service level reforecast
- % service level goal
- % service level actual
- Agents scheduled
- Agents reforecast
- Agents actual

Figure 46. **Coverage: Reforecast view**



Intraday: Data View

The Intraday: Data view shows actual data compared to forecast data in chart form.

The chart can display any or all of following metrics by clicking the appropriate metric buttons on and off:

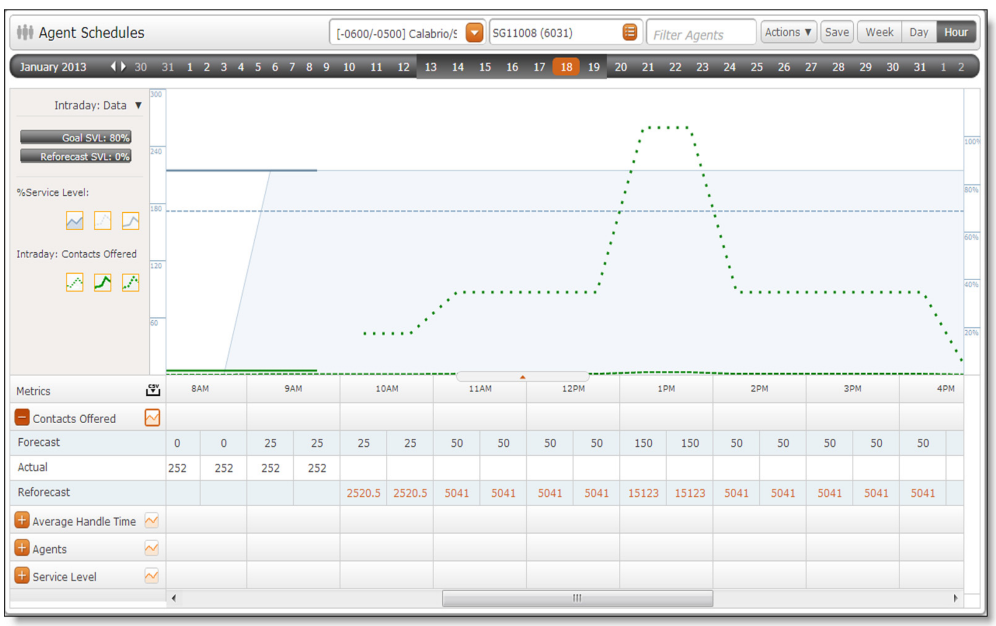
- % service level—scheduled, goal, and actual (always available)

- Contacts offered—forecast, actual, and reforecast (available when the Show in Graph button on the Contacts Offered drawer is clicked)
- Average handle time—forecast, actual, and reforecast (available when the Show in Graph button on the Average Handle Time drawer is clicked)
- Agents—scheduled, forecast, actual, and reforecast (available when the Show in Graph button on the Agents drawer is clicked)
- Service level—reforecast (available when the Show in Graph button on the Service Level drawer is clicked)

The data used to create the chart is provided in tabular form in drawers at the bottom of the chart. The tabular drawers show the following metrics for 30-minute intervals:

- Contacts offered (forecast, actual, and reforecast)
- Average handle time (forecast, actual, and reforecast)
- Agents (forecast, scheduled, actual, and reforecast)
- Service level (forecast, scheduled, actual, and reforecast)

Figure 47. Intraday: Data view coverage chart



The tabular data can be exported in CSV format by clicking the CSV download icon to the right of the Metrics label.

Insert Activity

The Insert Activity dialog box (Figure 48) allows you to add an activity to the agents' schedule.

Figure 48. Insert Activity dialog box

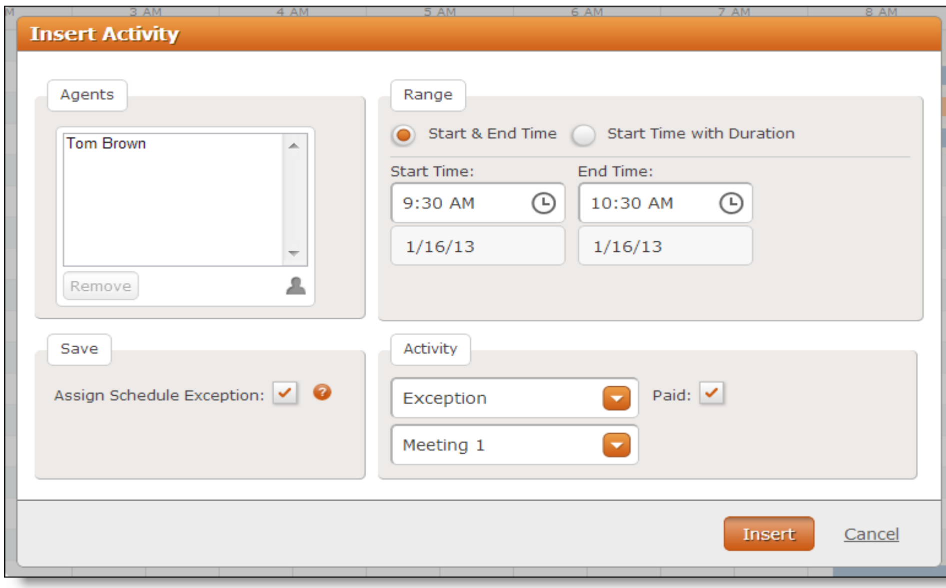


Table 29 describes the fields in the Insert Activity dialog box.

Table 29. Insert Activity fields

Field	Description
Agents	The agents involved in this activity. You can choose one or more agents from the list. Only agents that are assigned to the team in your Main View appear in this list.
Remove	Deletes one or more selected agents from the list.
Range	Choose a date range option, Start & End Time or Start Time with Duration.
Start Time	The time and date when the activity begins. • Time field—displays 12:00 AM by default. You can type the start time in 5-minute increments in the time field, or you can select the start time from the drop-down list in half-hour increments. • Date field—the date chosen for the activity. Default date is today.
Duration	The duration of the activity in hours and minutes. This option only appears when you select Start Time with Duration.

Field	Description
End Time	The time and date when the activity ends. • Time field—displays 12:00 AM by default. You can type the start time in 5-minute increments in the time field, or you can select the start time from the drop-down list in half-hour increments. • Date field—the date chosen for the activity. Default date is tomorrow.
Select Activity	Select the type of activity to be inserted in the schedule.
Select Type	Select the type of activity. The Select Type field appears only for activities that can be further specified.
Paid	Select the Paid check box if the scheduled activity counts toward the agent's number of hours worked during the week. The check box is selected or cleared by default depending on the activity you select.
Assign Schedule Exception	Enabled only when you select Exception as the activity. Select the check box if you want the schedule exception to be saved to the agent's schedule exception list so that if the schedule is rerun, the exception will appear in the agent's schedule. If you do not select the check box, the exception will be lost if the schedule is rerun.

Inserting an Activity

Follow these steps to insert an activity in one or more agent's schedules. The agent schedule for the desired service queue group, service queue, team, or skill mapping should be displayed.

TASK

1. In the Agent Schedules page, do one of the following:
   - Choose Actions > Insert Activity from the Agent Schedules toolbar to display a blank Insert Activity dialog box.
   - Right-click the desired agent's scheduled activity on the schedule and select Insert to display the Insert Activity dialog box with information for the scheduled activity entered.
2. Complete the fields in the dialog box as desired and click Insert to insert the new activity in the agent's schedule.
3. Click Save to save the schedule change.

Trade Schedule

The Trade Schedule dialog box (Figure 49) allows you to trade schedules between two agents.

You can trade schedules for the same day, different days, or multiple days. When trading agent schedules, note that when a schedule crosses midnight, the agent is scheduled to start work the day the schedule began.

> NOTE: If another supervisor trades agent schedules through the legacy application, you will not be informed. We recommend that you approve trade requests using the Agent Schedules application.

Figure 49. Trade Schedule dialog box

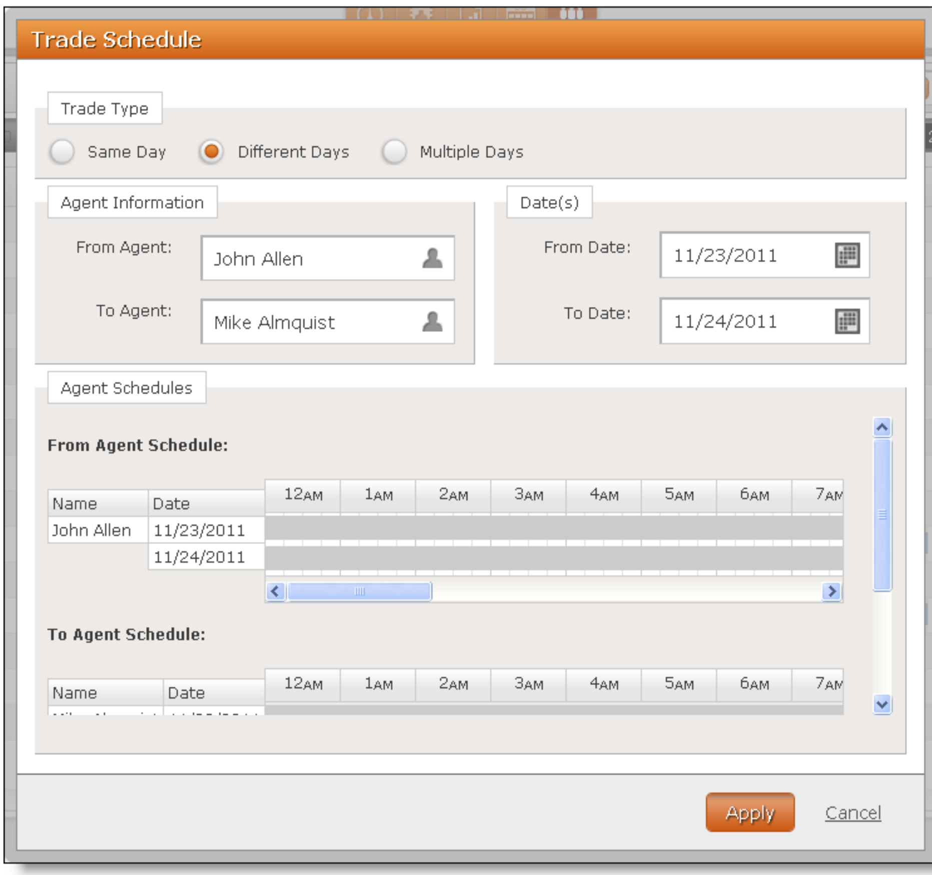


Table 30 describes the fields in the Trade Schedule dialog box.

Table 30. Trade Schedule fields

Field	Description
Trade Type	The type of trade for this action. You options are: • Same Day—trade schedules on the same day. When you choose this option, the Schedule Date field appears. This option is selected by default. For example, you can use this option to trade Agent A's 07:00–15:00 schedule with Agent B's 09:00–17:00 schedule on the same day. • Different Days—trade schedules on different days. When you choose this option, the From Date and To Date fields appear. For example, you can use this option to trade Agent A's scheduled Thursday with Agent B's scheduled Friday. • Multiple Days—trade multiple day schedules. When you choose this option, the Start Date and End Date fields appear. For example, if you chose the 1/23/2012 in the Start Date and 1/27/2012 in the End Date then you will trade Agent A's Monday (23rd) 07:00–15:00 schedule with Agent B's Monday (23rd) 09:00–17:00 schedule plus Tuesday (24th), Wednesday (25th), Thursday (26th) and Friday (27th).
Agent Information	The agents' involved in the trade. • From Agent—the first agent whose schedule you want to trade • To Agent—the second agent whose schedule you want to trade Only agents who are assigned to the team in your Main View appear in the From Agent or To Agent list.
Dates	The dates involved in the trade. The possible trade dates are: • Schedule Date—the date you want to trade schedules. Type the date, in mm/dd/yyyy format, or click the field and choose the date from the Calendar popup. • From Date—the first scheduled date involved in the trade. • To Date—the second scheduled date involved in the trade. • Start Date—the first day of the work shift that you want to trade. • End Date—the last day of the work shift that you want to trade.
Agent Schedules	The schedule for both agents displayed side-by-side allows you to compare the agents' schedules before you click Apply. • From Agent Schedule—the first agent's current schedule • To Agent Schedule—the second agent's current schedule

Trading Schedules Between Agents

To trade schedules between two agents:

TASK

1. Click actions > Trade Schedule to display the Trade Schedule dialog box.
2. Complete the fields.
3. Click Apply. The traded schedules are applied immediately to the production schedule.

Modifying Schedules Using Drag and Drop

You can change the start and end times of an agent's schedule and move scheduled activities within a day's schedule using drag and drop techniques.

With the schedules displayed in Hour view, double-click the agent's schedule bar to initiate drag and drop. When you do so, a duplicate schedule bar appears below the original bar.

- Use your cursor to drag the ends of the duplicate bar left and right to change the start and end times.
- On the original bar, use your cursor to drag a scheduled activity to a new time.

You must click Save to save the changes you have made to the schedule. If you want to cancel changes you have made but not yet saved, click the browser Refresh button to reload the page with the original schedule.

Reporting

The Reporting application is a common (multi-product) application that contains a set of reports. These reports are product specific. Initially, Reporting displays reports for all products that you logged into. The default set of reports are defined by the role assigned to you.

Reporting Roles and Scope

The reports available to you in the Reporting application is based on your highest role. For example, if you are both a supervisor and an agent, you can view the reports available to both roles.

Agent can view reports only on themselves. Supervisors can view reports for the specific agents and teams in their main view.

Running a Report

Follow these steps to run a report.

TASK

1. In the Reporting application toolbar, click one of these buttons:
   - The button for the product whose reports you want to run. If you use a shared login, there will be a button for each product.
   - The Saved button to access reports that have already been set up and saved for reuse.
2. From the resulting page, click the report you want to run to display that report's setup page.
3. Complete the report setup information. Choose the criteria, the date range, the format, and the fields to be included in the report.

4. If your role enables you to, set the recurrence of the report. You can set up the report to run automatically at specified intervals for a specified length of time or indefinitely. Recurring reports are emailed to the email addresses you enter in the Destination section. At least one email address is required.

5. Click Run Report to run the report immediately, or Save As to save the report for future use.

WFM Reports

All available WFM reports are described in the *Workforce Management Reports Reference*. Refer to that document for a description of the fields that can appear in every report.

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