Cisco Unified Workforce Optimization

Workforce Management User Guide Release 11.5

First Published: First Published: July 28, 2016

Last Updated: Last Updated: March 5, 2020

Workforce Management User Guide

Contents

Getting Started

This section describes how to log in to Unified Workforce Optimization and provides a brief description of the interface.

Unified Workforce Optimization supports the following applications:

- Quality Management
- Workforce Management

The information provided in this section is common to each of these applications, except where noted.

Accessing Unified Workforce Optimization

Unified Workforce Optimization is a web application. Access it by entering the following URL in your browser:

https://<base server> or

http://<base server>

where <base server> is the host name or IP address of the server that hosts the Unified Workforce Optimization Container.

Accessing Unified Workforce Optimization on a Mobile Device

You can access Unified Workforce Optimization on a mobile device such as a smart phone or tablet by entering the Unified Workforce Optimization URL in the device's browser. You are automatically redirected to a mobile version of Unified Workforce Optimization where you log in as usual.

Note: Your mobile device must be able to access the network where Unified Workforce Optimization is installed.

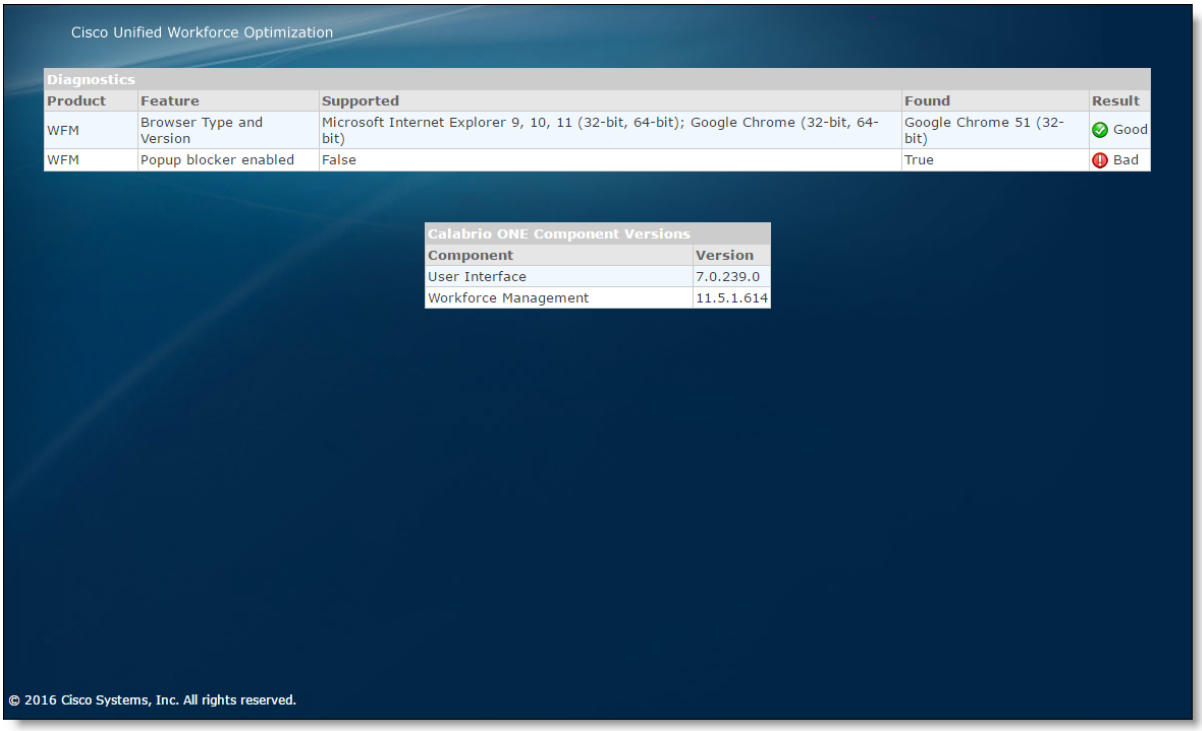
The mobile version contains a limited number of features for agents. With it you can:

- View your schedule
- View dashboard widgets
- Make and respond to requests
- Read notifications and alerts

Validating Your PC

Before you log in to Unified Workforce Optimization for the first time, validate your PC. Validating your PC means that Unified Workforce Optimization checks it to make sure that it has all the features required to run the Unified Workforce Optimization products.

To validate your PC, access the Unified Workforce Optimization login page and click the Validate my PC configuration link. Unified Workforce Optimization performs the evaluation and then displays the Diagnostics page, which lists the required features for each product in your system. The Result column tells you if your PC is configured correctly or not for that feature.



If the Diagnostics page shows Bad for any feature, you must correct that before you can log in to Unified Workforce Optimization. In some cases you will see links at the bottom of the page that will help you correct a problem. In other cases you will have to contact your supervisor or administrator for assistance.

The Component Versions section of the page displays the current versions of Unified Workforce Optimization and each installed product.

Logging In

The Unified Workforce Optimization login page allows you to log in to a single product or to multiple products simultaneously.

The following table describes the fields on the Login page.

Field	Description
Separate Product Logins check box	This check box is present only in systems with multiple products. By default it is clear, so that when you log in, you log in to every product simultaneously. If you select the check box, you can log in to a specific product in your system.
Product name check box	This check box is present only in systems with multiple products. If you opt for separate product login, after you select the desired product you must select this check box. If you do not select it, the Username and Password fields are not enabled.
Username	Your username. If your system uses Active Directory, this is your Active Directory username. If your system does not use Active Directory, it is the username assigned to you by your administrator. **Note**: If not using Active Directory, and your administrator wants to take advantage of multiple login, your username and password must be the same in every product.
Password	Your password. If your system uses Active Directory, this is your Active Directory password. If your system does not use Active Directory, it is the password assigned to you by your administrator.
Domain	The Active Directory domain. This field is displayed only on systems that use Active Directory. Select the domain associated with your Active Directory username and password.
Language	Choose the language for the interface.
Product icons	These icons are displayed only in multiple product systems and if you have opted for separate product logins. When you click an icon, the name of the product appears above the Username field. Use these icons to select the product you want to log in to.
Validate my PC configuration	Click this link to make sure your PC is configured correctly to use Unified Workforce Optimization. See *Validating Your PC* for more information.

To log in to one product:

1. Select the Separate product logins check box.
2. Click the product icon for the product you want to log in to.
3. Select the product name check box.

4. Complete the fields on the Login page.
5. Click Login.

> **Note**: If there is only one product in your system, the Login page is simpler, and shows only the Username, Password, Domain (if you use Active Directory), and Language fields.

There is no limit to the number of login attempts you can make. An error message appears if your credentials are not correct.

To log in to multiple products:

1. Clear the Separate product logins check box (this is clear by default).
2. Complete the fields on the Login page and click Login.

If your credentials are the same across the product suite, your login gives you access to all those products (based on your role).

However, if your credentials are not the same for one or more of the products in the product suite, you are not notified of the error. You will be able to access only the products for which your credentials were valid.

To find out which products you could not access, log out and use the separate login option. Log in to each product in turn to find out which one is rejecting your credentials.

Workforce Management User Roles

The following table shows the features available by role for WFM.

> **Note**: The scope of a user's role limits the number of features available within an application. For example, while all roles can access reports, agents can view only one report while administrators can view all available reports.

Application	Administrator	Scheduler	Supervisor	Agent
Agent Schedules	x	x	x	
Application Management	x	x		
Workflow Administration	x	x		
Dashboard	x	x	x	x

Application	Administrator	Scheduler	Supervisor	Agent
Messaging	x	x	x	x
My Schedule	x	x	x	x
My Availability	x	x	x	x
Planning	x	x		
Reporting	x	x	x	x

About the Administrator Role

WFM comes with a system administrator user ID. The password for this user ID (administrator) is initially set during installation in the WFM Configuration Setup utility, and maintained in WFM (via the Users page for the administrator user).

You cannot assign the administrator role to any other user in WFM. "Administrator" is not an option in the list of roles available when configuring users.

However, it is possible to have multiple WFM administrators.

- In systems that use Active Directory to administer user IDs and passwords, you can configure Active Directory users to be WFM administrators by assigning them to a specific user group within Active Directory. The name of this group is entered in the WFM Configuration Setup utility (WFM Authentication step) when adding the connection information for Active Directory. WFM treats any users who are members of this group as WFM administrators.
- In systems that do not use Active Directory, the only way to have multiple administrators is to allow people to share the administrator user ID and password.

Using Mulptiple Browser Tabs

You can run applications in separate browser tabs or separate instances of your browser during the same session. For example, you can run the Reports application in one tab and the Application Management application in another.

Logging in to or out from any browser tab or browser instance affects your login status in all browser tabs and browser instances.

Example: If you log in as User 1 in one tab, you are logged in as User 1 in every other tab or browser instance you open. If you log out as User 1 and then log in as User 2 from any tab or instance, all tabs and instances will be logged in as User 2 after they are refreshed.

Note: If you are running an instance of two different browsers (for example, Internet Explorer and Chrome) you can be logged into each as a different user.

To run applications in separate browser tabs:

1. Log in to Unified Workforce Optimization.
2. Copy the URL.
3. Open a new browser tab or instance and paste the URL in the address field.
4. Navigate to the application you want to display in that tab or instance.
5. Repeat steps 3 and 4 as many times as desired.

Clearing Your Browsing History

If Unified Workforce Optimization does not display pages properly (for example, a page is blank), it is recommended that you log out and clear your browser's browsing history.

To clear Internet Explorer browsing history:

1. In Internet Explorer, choose Tools > Internet Options.
2. On the General tab, click Delete in the Browsing history section and then click OK.
3. Restart Internet Explorer.

To clear Chrome browsing history:

1. On the browser toolbar, click the Chrome menu.
2. Choose More Tools > Clear browsing data.
3. In the dialog that appears, choose how far back you want to clear data, and select the Browsing history check box.
4. Click Clear browsing data.
5. Restart Chrome.

Best practices: It is recommended that you configure Internet Explorer to clear the browsing history every time you exit. To do this, choose Tools > Internet Options > General tab. In the Browsing history section, select the Delete browsing history on exit check box.

Logging Out

To log out of Unified Workforce Optimization:

1. Hover your mouse over your username in the upper right corner of the page.
2. Click Log Out. You are returned to the Login page.

> **Note**: If you are logged into multiple products, logging out from one will log you out from all.

To log out of Unified Workforce Optimization completely:

- Close your browser.

User Interface

The Unified Workforce Optimization interface is divided into two sections: the container toolbar and the application pane.

Note: Using the Control Panel settings to change the way the application is displayed could result in the user interface not being displayed correctly.

Container Toolbar

The container toolbar at the top of the page displays buttons you can use to do the following:

- Access applications
- View the name of the user who is currently signed in
- Log out
- View alerts
- Access online help

The following table describes the buttons that can appear in the toolbar.

Button	Icon	Description
Logo	–	Click the logo to navigate to the Cisco website. Click the down arrow at the right of the logo to show a drop-down menu of all available applications.
Dashboard		Provides information based on the products installed. Administrators can configure what each role can see on the Dashboard, and lock it down so that users cannot change it.
Schedules and Planning		Allows: • Administrators, supervisors, and schedulers to manage schedules for selected agents by updating the production schedule and by viewing and editing agent availability. • Schedulers to manage forecasts and schedules. • Agents to display their schedules by day, week, or month and their availability.
Messaging		Allows agents to make requests, and administrators, supervisors, and schedulers to manage requests.
Application Management		Allows administrators and schedulers to configure and manage WFM and its users.
Reporting		Allows you to generate reports.
Administration		Allows the administrator to perform the following tasks: • Evaluation Form Manager: Configure evaluation forms • Metadata: Configure metadata • Phrase Manager: Configure categories and phrases
Signed In	–	Displays the name of the current user, and allows you to log out.

Button	Icon	Description
Alerts		Displays a list of alerts; the number is the number of unread alerts. For more information on alerts, see *Alerts*.
Help		Displays the online help.

Application Pane

The application pane displays the application you select from the toolbar. The applications available to you depend on your role and software license.

All applications available in Unified Workforce Optimization have the same basic layout. The following table lists the 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.

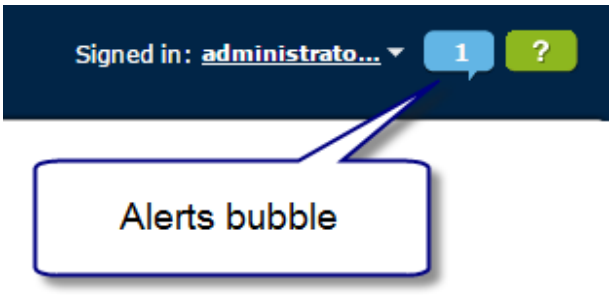
Unified Workforce Optimization application information is displayed on “dashboards” that either you configure or your system administrator configures for you. The specific Unified Workforce Optimization information you need is displayed in “widgets” that displays the specific information that either you configure or your system administrator configures for you. Refer to Working with Widgets for more information.

Tables

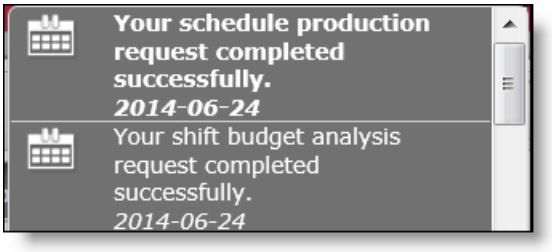
Unified Workforce Optimization often displays information in tables. This data can be sorted based on the contents of a single column in the table. The sort can be ascending or descending.

Alerts

WFM generates alerts to let you know the status of requests you run, and if there are any intraday dynamic scheduling event invitations for you. The Alerts bubble at the upper right corner of the window contains a number that shows how many unread alerts are available for viewing.



When you hover your mouse over the Alerts bubble, the Alerts List is displayed.



Click any of the listed alerts to display a popup containing a more detailed explanation of the alert.

When you click Close, the popup closes and the number displayed in the Alerts bubble is reduced by one. The only way to remove items from the Alerts List is to hover over an alert and then click the X in the upper right hand corner, one by one. The Alerts List will otherwise keep accumulating alerts.

Alerts remain in the list for seven days. After seven days they are automatically deleted whether or not they have been read.

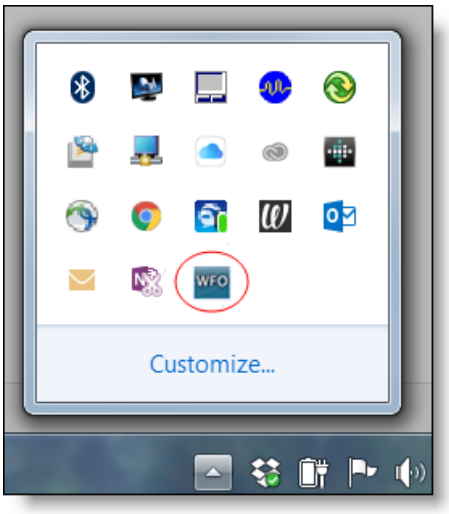
Note: Sometimes alerts remain in the list after the seven days are up. To clear the list, log out and then log back in.

System Tray Alerts

The alerts that appear in the Alerts bubble can also appear in the system tray. This allows you to receive alerts and notifications even if Unified Workforce Optimization is not open on your desktop. The Notification client must be installed on your PC in order for you to receive the popups.

Note: This feature is available only to users who log into Unified Workforce Optimization with Windows Active Directory credentials.

If installed, there will be a Unified Workforce Optimization icon in the system tray when Unified Workforce Optimization is running.



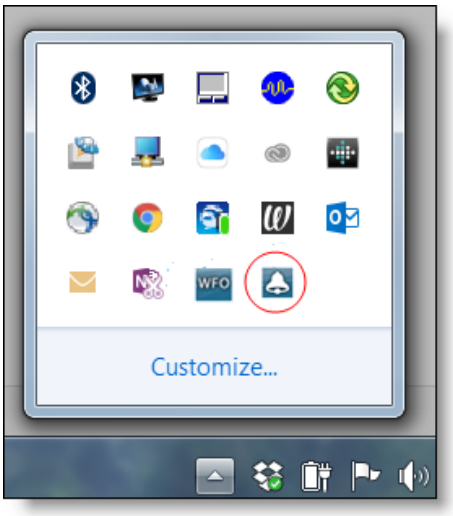
If Unified Workforce Optimization is running but the system tray notification application is not connected to it, then the icon shows a diagonal line across it:

Right-click the icon to view a context menu that allows you to open Unified Workforce Optimization, show alerts, or exit.

When you receive an alert, you are notified two ways:

- A toast popup slides open in the lower right corner of your desktop. The popup disappears after nine seconds.
- An alert icon appears in the system tray. The icon disappears as soon as you read any unread notifications.

Click the popup or alert icon to read the complete alert notification.



Note: The alert icon behaves the same way as any other Windows system tray icon. You can drag it to the system tray in the task bar or close it if you wish. By default it appears in the primary system tray.

Synchronizing with the ACD

WFM can synchronize data with from ACDs (for example, Cisco Unified Contact Center Enterprise and Cisco Unified Contact Center Express).

Synchronizing with Cisco ACDs

The Sync Service automatically extracts the following information from the Cisco ACD and loads it into WFM:

- Agents
- Teams
- Relationships between agents and teams
- Service queues
- Skill mappings

Once this information is extracted to WFM, you can then configure WFM to generate forecasts and schedules for service queues.

Note: Any teams, agents, relationships, or service queues you create in WFM are not synced back to the ACD. They are maintained only in WFM.

Agent Data

WFM assumes that every user imported from the ACD to WFM is an agent. As a result, it creates a user record and an agent record for each synced user and then links the two together.

Before you activate an agent in WFM, ensure that the user actually is an agent and not a supervisor or scheduler.

If the user is not an agent, you must create a new non-agent user manually in WFM and assign the appropriate role and view to that user.

When user data is changed in the ACD, the Sync service detects it and makes changes in WFM. The following table summarizes these changes.

Change in the ACD	Resulting Change in WFM
New agent is added	New agent is added. Specifically: • Applies the ACD agent first and last name to the WFM agent first and last name. • Applies the ACD login ID to the WFM Employee ID and ACD ID. You can change the Employee ID but not the ACD ID. Changing the Employee ID has no effect on the ACD login ID. • Sets the WFM start dates for the company and department to the current date. • Assigns the corresponding team to the agent as the agent's main team. • Assigns the agent to the NewAgents team and the default team, if there is one. New user is added. Specifically: • Applies the ACD agent first and last name to the WFM user first and last name. • Creates a link between the user and the agent. • Assigned the Enterprise view to the user. • Assigns the Agent role to the user if the user is an agent, and assigns the Supervisor role to the user if the agent is also a supervisor in the ACD. • Sets the status of the user to inactive.

Change in the ACD	Resulting Change in WFM
Agent first or last name is changed	Agent first or last name is changed.
Agent is deleted	No change.

Team Data

When team data is changed in the ACD, the Sync service detects it and makes changes in WFM. The following table summarizes these changes.

Change in the ACD	Resulting Change in WFM
New team is added	New team is added with the same name. Makes any agent who is a member of the team in the ACD a member of the team in WFM, associates the team with the Enterprise view, and designates the team as the agent's main team.
Team name is changed	Team name is changed.
New agent is added to the team	New agent is added to the team, and the team is designated as that agent's main team.
Team is changed	No change.
Agent is removed from a team	No change.

You can create teams in WFM and assign agents to these teams, but these new teams are not synchronized with the ACD.

In the ACD, an agent can belong to only one team. In WFM, an agent can belong to multiple teams. Assigning an agent to a team in WFM has no effect on the agent's team assignment in the ACD.

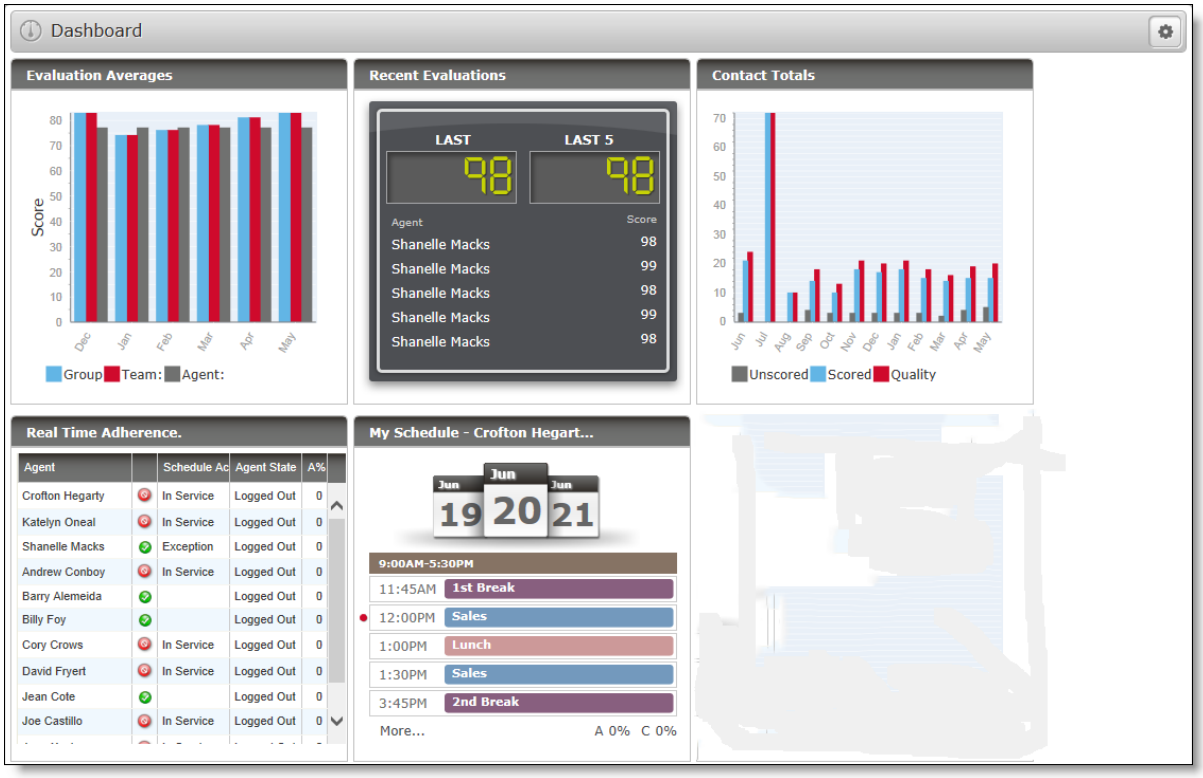
Service Queue Data

When service queue data is changed in the ACD, the Sync service detects it and makes changes in WFM. The following table summarizes these changes.

Change in the ACD	Resulting Change in WFM
New service queue is added	New service queue is added. Specifically: • Applies the ACD service queue name to the WFM service queue description. • Applies the ACD service queue ID to the WFM service queue ID. • Associates the service queue with the Enterprise view. • The new service queue has a service queue type of Interactive/Voice. New skill mapping is added. Specifically: • Associates the new service queue with the new skill mapping. • Applies the ACD service queue name to the WFM skill mapping name. • Associates the skill mapping with the Enterprise view. Creates a one-to-one mapping between the ACD skill mapping and the WFM skill mapping.
Service queue name is changed	Applies the new ACD service queue name to the WFM service queue description (name). Applies the new ACD service queue name to the WFM skill mapping name.
Service queue is deleted	No change.

Dashboard

The Dashboard application 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 depend on which products you log in to, your role, and the dashboard view assigned to you by the administrator.

> **Example**: If you log in to 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 temporarily not available, the widgets associated with that product do not appear.

The dashboard displays all widgets in a continuous sequence, left to right and top to bottom.

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, including the type of chart to be displayed (line graph, vertical bar, and stacked bar)
- Reposition the widgets in the dashboard

Changes made to the dashboard or widget settings are saved automatically after they are applied and persist until they are changed by 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 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. Administrators can view all widgets.

Widget	Agent	Supervisor	Scheduler
Agent Calls per Hour	x	x	x
Agent Call Volumes	x	x	x
Agent Percentages	x	x	x
Agent Time Distributions	x	x	x
Agent Time Totals	x	x	x
My Schedule	x	x	x
Real-Time Adherence		x	x
Service Queue Performance		x	x

Widget Descriptions

This section describes the widgets available in your dashboard.

Agent Call Volumes Widget

The Agent Call Volumes widget 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.

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.

Agent Calls per Hour Widget

The Agent Calls per Hour widget 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.

A call is counted in the schedule interval in which the agent answers it.

> **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 Percentages Widget

The Agent Percentages widget 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.

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

- Occupancy %—The percentage of time the agent spends answering ACD calls to the total amount of time the agent is logged in and ready to take calls during the interval.
- Utilization %—The percentage of time the agent spends answering ACD calls to the total amount of time the agent is logged in during the interval.

Agent Time Distributions Widget

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

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 the following data elements in any order.

Data Element	Description
Average Handling Time	Depends on which ACD your system uses: Unified CCX—The average amount of time an agent was in the Talking, On Hold, Work Ready, and Work Not Ready states.

Data Element	Description
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.
Average Work Time	The average amount of time an agent spent in the Work state immediately following an ACD call.
Average Ready 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 displays the total time an agent spent in specific ACD states for the selected date range.

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 the following data elements in any order.

Data Element	Description
Total Handling Time	Depends on which ACD your system uses: Unified CCX—The total amount of time an agent was in the Talking, On Hold, Work Ready, and Work Not Ready 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 Work Time	The total amount of time an agent spent in the Work state immediately following an ACD call.
Total Ready 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.

Data Element	Description
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 contact work time). Default option for Series 1 in the Settings panel.
Total Login Time	The total time during the period the agent was logged into the ACD. Default option for Series 2 in the Settings panel.

My Schedule Widget

The My Schedule widget displays a summary of an agent's schedule for one day, with the default being today. The widget shows the agent's earliest scheduled activity and up to four more (if they exist). If the schedule has more activities than that, the word "More" appears at the bottom of the widget. The current activity is marked with a dot at the left side.

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

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 the currently selected day'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* for more information on time zones.

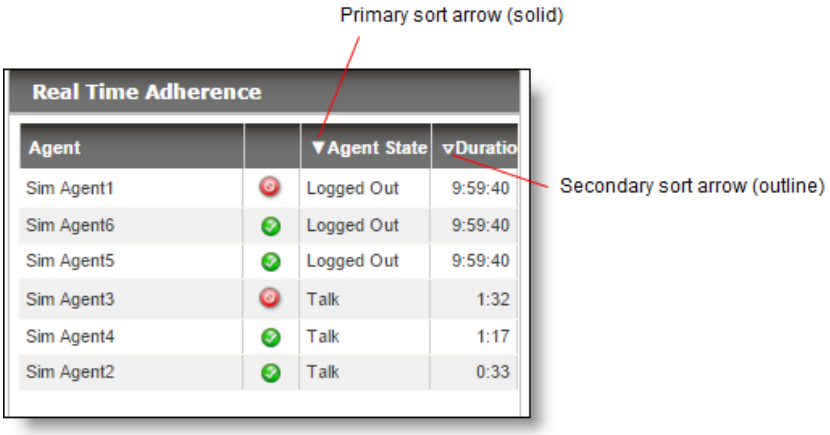
Agents cannot modify the My Schedule widget. Supervisors can modify the widget by selecting the agent whose schedule is displayed in the widget and renaming the widget as desired.

Real-Time Adherence Widget

The Real-Time Adherence widget displays real-time adherence data for selected agents. The data is updated every 30 seconds, except for the adherence and conformance percentages, which are updated every 15 minutes. It is available to supervisors, schedulers, and administrators.

You can resize columns in the widget by dragging the column header dividers to the left or right.

This widget allows you to sort data by one or two columns, in ascending or descending order. Click the header of the primary sort column first. A solid arrow indicates the primary sort. Click the header of the second column for the secondary sort. An outlined arrow appears for the secondary sort. Clicking a header a third time removes the sort. The widget example below illustrates a multi-column sort.



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.
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".

Data Element	Description
Conformance %	The percentage of time an agent works the scheduled 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 Agent State column.
State Duration	The Agent State duration, in hours, minutes, and seconds.

Service Queue Performance Widget

The Service Queue Performance widget is available to supervisors, schedulers, and administrators only. It displays the real-time service level performance (% Service Level) 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.

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 panel.

Administrator Tasks

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 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 administrator username and password.

To configure the dashboard by role:

1. Select a role from the Role drop-down list in the Dashboard toolbar and then click Settings to display the Configure Dashboard Widgets dialog box.
   a. Drag the widgets you want to appear on the dashboard from the Available Widgets list to the Selected Widgets list. To remove widgets from the Selected Widgets list, select them and 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 dialog box.
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 dialog box, 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.

Agent, Supervisor, and Scheduler Tasks

The content of your dashboard depends on whether the dashboard is unlocked, or whether the administrator has configured the dashboard for your highest role and 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 locks down a dashboard for your role.

With an unlocked dashboard, you can do the following:

- **Rearrange the widgets on your dashboard**— click and hold 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 dialog box, 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 dialog box, 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 Settings* 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 Widget Configuration icon is present in the toolbar.

> **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 Widget Configuration icon is disabled in the widget toolbar.

Application Management

Application Management is used by administrators to configure product features. If you have access to more than one product, then you can see the configurable features for all those products.

A product must be running in order for you to access and configure its features.

Long View Navigation

The navigation pane at the left of any Application Management page is called the "long view".

Use the long view to help you move up and down on the page. A navigation link in the long view will turn bold blue when you select it, and that section of the page will jump to the top of the window.

Check marks next to each navigation link tell you if a section of the page has been completed or not. When all links are checked, you have provided all the information necessary to configure that record.

Schedules

The pages in this section of Application Management enable you to set up all the elements required to generate a schedule.

The pages are:

Work Shifts

WFM allows you to create work shifts that match agents' availability, preferred days off, start time, and length of work day. A work shift identifies the hours and days when an agent can work. You can create a work shift for one or more agents. WFM will then schedule agents to best match their work shift preferences and business requirements. There is no limit to the number of work shifts you can create, and WFM retains the previous schedule history for each agent in the WFM database.

When configuring a work shift you need to determine what type of work shift it is. You can assign agents and work conditions to a work shift for specific weeks. WFM allows you to manage the following work shift types.

- Fixed work shift
- Assignment work shift
- Variable work shift

You can create multiple work shifts and then assign them to an agent's work shift rotation. If you use work shift rotations (an agent works different shifts over several weeks) you must define the shift and rotation sequence. See Managing Agents and Example: Work Shift Rotation for more information.

If an agent creates a dynamic schedule that falls within a work shift rotation, the dynamic schedule overrides the rotation for that week. The rotation resumes after the dynamic schedule. WFM uses these priorities when setting work shifts:

1. Dynamic scheduling
2. Dynamic availability
3. Traditional work shifts

For example, if an agent has a work shift rotation of three work shifts, but creates a dynamic schedule that falls on the second week of a rotation, that dynamic schedule overrides the work shift rotation for the second week. The rotation resumes for the third week, and the next rotation resumes the normal three-week rotation.

Rotation 1	Rotation 2 with Dynamic Schedule Added	Rotation 3
Work Shift 1	Work Shift 1	Work Shift 1
Work Shift 2	Dynamic Schedule	Work Shift 2

Rotation 1	Rotation 2 with Dynamic Schedule Added	Rotation 3
Work Shift 3	Work Shift 3	Work Shift 3

Note: If a work shift is deleted, the agent's work shift assignment is also deleted. Subsequent agent work shift assignments will not be automatically adjusted to be adjacent to earlier assigned work shift dates. This can result in weeks where the agent has no work shift assigned.

Agents can trade work shifts. These trades must be approved by supervisors, schedulers, administrators, or workflow rules.

Supervisors, schedulers, and administrators can also perform ad hoc schedule trades based on business requirements and the needs of the contact center.

Fixed Work Shifts

A fixed work shift is a work shift that covers requirements for fixed hours and days and never varies. Use this type of work shift to schedule agents to support requirements for entire days or weeks.

A fixed work shift has the following characteristics:

- Work days during the week are fixed
- Hours worked each day are fixed, but do not have to be the same for each day
- The shift start time each day is fixed, but does not have to be the same for each day
- The number of hours per week specified for the work shift (Hours per Week) must equal the total number of hours scheduled for the days of the week in the work shift (Total Hours)

If you assign a fixed work shift to an agent, the agent's schedule never changes. If you assign fixed work shifts to all agents, you cannot optimize schedules to ensure adequate coverage at all times.

Assignment Work Shifts

An assignment work shift is a type of fixed work shift that does not cover requirements. Use an assignment work shift to schedule agents for out of service activities such as projects for entire days or weeks.

Variable Work Shifts

A variable work shift is a work shift that covers requirements for variable hours and days. Use this type of work shift to schedule agents to support a service queue for variable days and weeks. In contrast to a fixed work shift, a variable work shift offers flexibility in at least one of the following ways:

- You can assign one or more days a week as an optional work day.
- You can assign the total work hours for one or more days per week as variable.

- You can assign the arrival time for one or more days a week as variable.

One or more of the following characteristics are different in a variable work shift:

Minimum and Maximum Days per Week and Hours per Week

With a variable work shift, you might want to limit the maximum number of days and hours per week to limit overtime and guarantee a reasonably rested employee. You might also need to commit a minimum number of hours per day and days per week for the agent. You specify the minimum and maximum number of days per week and hours per week for the work shift. Then you specify the minimum and maximum number of hours for each day of the week that the agent can work for the day. You might also specify the days of the week that are potential days off for the agent.

Earliest and Latest Start Times

Determine the earliest time you might want the agent to start work and when the agent can start work. Once you know the earliest and latest possible start times, you configure the earliest and latest start times for an agent in WFM for each day in a work shift.

Managing Work Shifts

The Work Shifts page (Application Management > Schedules > Work Shifts) allows you to create, edit, delete, and assign work shifts. You can also view assigned work shifts.

The fields on the page when you create, edit, or delete a work shift are described below.

Field	Description
What Do You Want To Do?	Choose whether you want to edit or delete an existing work shift, or create a new one.
Work Shift Name	Enter a unique name for the work shift.
Activate	Select this check box to activate the work shift. It must be activated in order for it to be available for use. **Note**: When you deactivate a work shift, it no longer appears on agent schedules, and will not be used in new schedule requests. Agents assigned to this work shift need to be reassigned to different active work shifts or they will not be scheduled for the week, unless they have dynamic scheduling or approved dynamic availability for the week.

Field	Description
Work Shift Type	Select the type of work shift this is. ■ Fixed: Used to cover requirements for fixed hours and days. This work shift never varies. ■ Assignment: Used for agent activities when agents are not in service. This is a type of fixed work shift. ■ Variable: Used to cover requirements for variable hours and days. This work shift varies based on forecasted need when the work shift is applied.
Weekly Occurrence	(Variable work shifts only) Enter the minimum and maximum number of hours and days per week an agent can be scheduled. These values must be consistent with the shift parameters. For example, you cannot specify a minimum of 5 days per week when only one day is configured in the shift parameters.

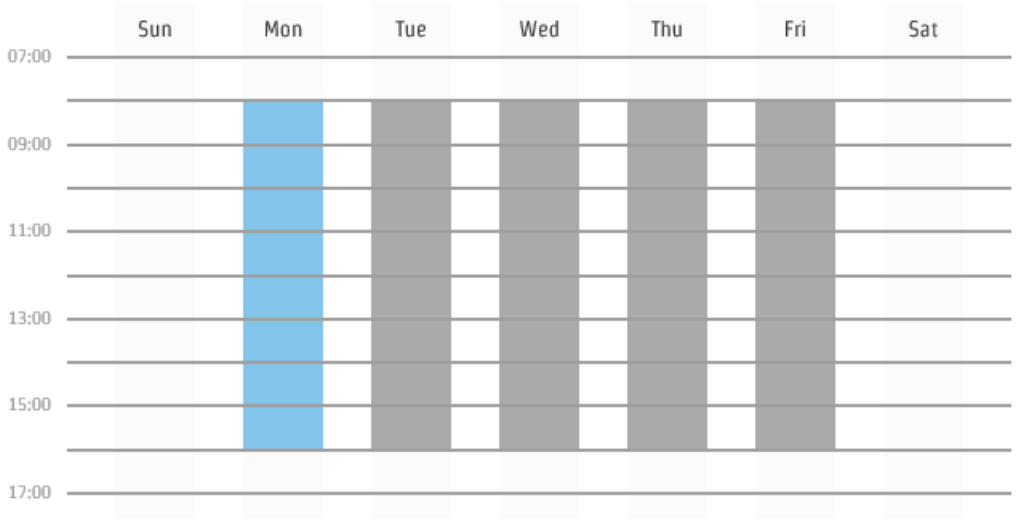
Field	Description
Shift Parameters	The shift parameters depend on the type of work shift you selected. As you enter parameters for each day of the week, they are displayed graphically in the work shift parameter graph. Fixed and Assignment Work Shifts: • Apply To: Select a day from the day bar to configure the parameters for that day. • Shift Start: Enter the time the shift starts. • Shift Length: Enter the length of the shift. • Days Per Week: This value is read-only, calculated based on the number of days you configure. • Hours Per Week: This value is read-only, calculated based on the number of days you configure and the shift length each day. Variable Work Shifts: • Apply To: Select a day from the day bar to configure the parameters for that day. • Shift Start: Enter the earliest and the latest times that the agent's shift can start for that day. • Shift Length: Enter the minimum and maximum shift length for that day. • Minimum Interval: Enter the minimum amount of time between work shifts. • Days Off Allowed. Select this check box if the agent can have this day off. If cleared, the agent will be required to work this day if there are hours available.
Schedule Increment	(Variable work shifts only) Select the desired shift length increment. The default value is 30 minutes.

Field	Description
Work Conditions	Select the Work Conditions that apply to the work shift. **Best Practices:** In a future release, work conditions will no longer be associated with work shifts. As a result, you should associate work conditions to Work Condition Profiles rather than to work shifts. **Note**: This list includes only non-general paid hours work conditions. If the agent has a work condition profile that includes the work conditions, the work condition profile will be used instead of the work conditions.

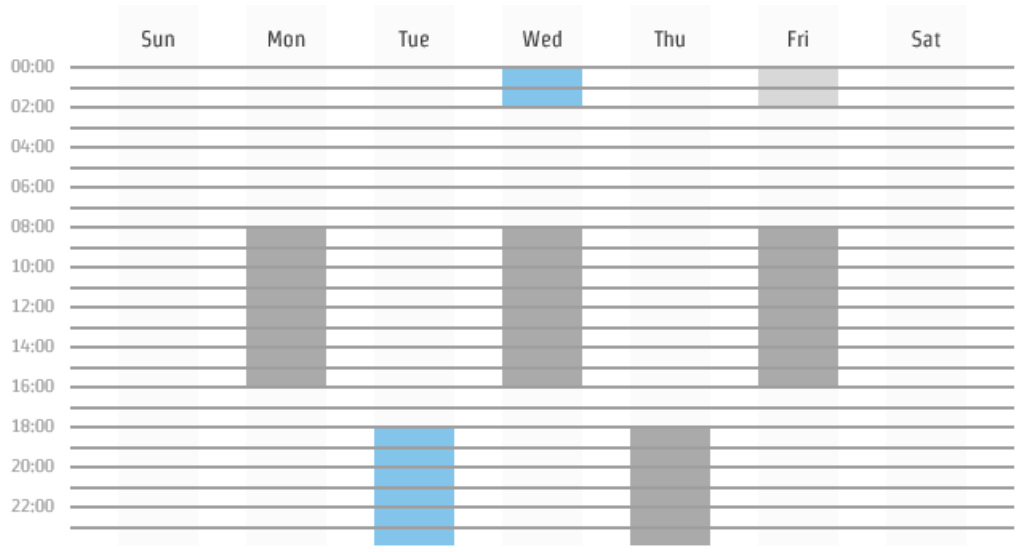
Understanding the Work Shift Parameter Graph

The work shift parameter graph is a visual representation of the work shift you are configuring. It displays a bar for every day you set up, showing the start times and durations. For fixed and assignment work shifts the graph shows a gray bar for each scheduled day of the week. The selected day is shown in blue.

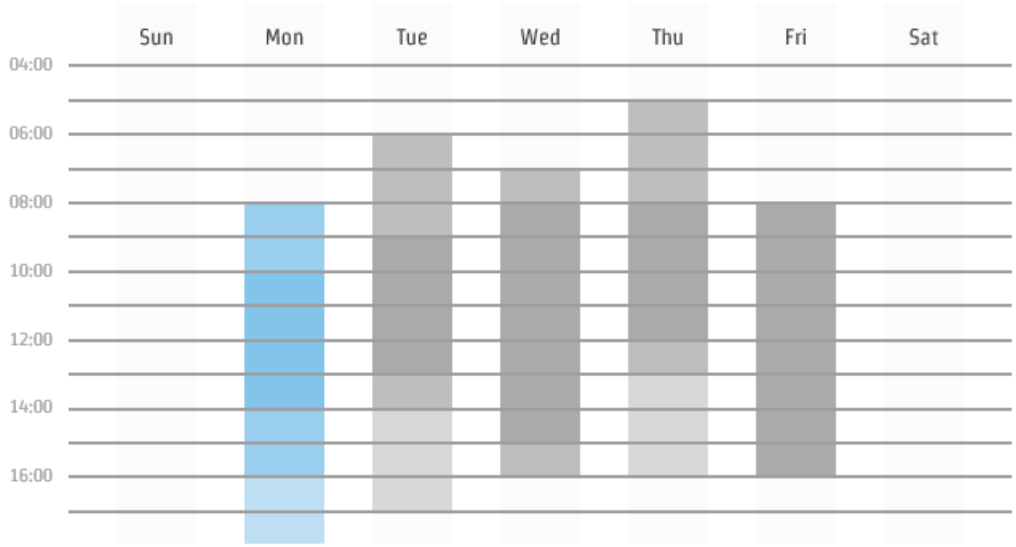
The following graph shows a fixed shift that starts at 08:00 Monday through Friday and has a duration of 8 hours daily.



The following graph also shows a fixed work shift, but it includes two days on which the scheduled work shift crosses midnight. On Tuesday and Thursday, work starts at 18:00 and ends at 02:00 the next morning. This is shown visually by having the bar for Tuesday (the day is selected in the day bar so it shows as blue in the graph) continue into Wednesday.



The following graph shows a variable work shift. The core hours the agent works each day are shown in dark gray or blue. The variable start times and shift duration are indicated by lighter gray or blue. For example, on Monday, the agent can start work from 08:00 to 10:00, and the shift duration is between 4 and 8 hours long. The dark blue indicates that no matter when the agent starts or how long the shift is, the agent is in the contact center from 08:00 to 14:00



Viewing Assigned Work Shifts

You can use the View assigned work shifts option to see a list of the assigned work shifts for the week that includes a selected date.

When you choose a date, the Assigned Work Shifts table displays all work shifts scheduled for the week that includes your selected date, and the number of agents assigned to each work shift.

You can view the names of the agents assigned to a specific work shift by selecting that work shift in the table and clicking Display Agents.

Work Conditions

WFM differentiates between routine and non-routine activities. It categorizes activities that occur during every work shift (such as breaks and lunches) as routine. These routine activities are called work conditions. A work condition is a set of rules used to identify routine activities that prevent the agent from answering contacts.

There are two types of work conditions:

- **Paid hours**— shift length is extended due to unpaid breaks and lunches.
- **Shift length**— shift length is not extended due to unpaid breaks and lunches.

Note: The Schedule service only uses *paid hours* work conditions; intraday dynamic scheduling and partial day trade/offers only use *shift length* work conditions.

A work condition might be linked to fixed, assignment, variable, or work condition profiles that are assigned to agents. If the agent can work 4.5 to 6 hours during a work shift and scheduling is in half hour increments, you can configure work conditions for 4.5, 5, 5.5, and 6 hours and assign them to the agent's work shift, or have them as general conditions. You can also configure a range-based work condition that covers a range from 4.5 to 6 hours.

Note: If you do not assign any work conditions, WFM creates agent schedules with no breaks or lunches. You can, however, create general work conditions if you do not want to assign specific work conditions to specific work shifts or work condition profiles.

Note: Only general conditions and work conditions assigned to work condition profiles that are assigned to agents are used in dynamic availability and partial day offers and trades.

For each work condition activity, you must specify the following information:

- Name of the work condition activity
- Duration of the work condition activity
- The minimum delay between the start of the work shift and the start of this work condition activity. For example, if the work shift starts at 08:00 and this work condition activity cannot start any earlier than 09:00, the minimum delay must be 1:00.

> **Note**: The delay must fit into the smaller length of a range-based condition.

- The maximum delay between the start of the work shift and the start of this work condition activity. For example, if the work shift starts at 08:00 and this work condition activity cannot start any later than 09:20, the maximum delay must be 1:20.
- The minimum interval between the end of the previous work condition activity and the start of this work condition activity. For example, if the previous work condition activity is a 15-minute break, and this work condition activity is a one-hour lunch, and there must be at least an hour and a half between the break and the lunch, the minimum interval must be 90 minutes.
- The increment in minutes that WFM uses to schedule the work condition activity. Possible values are 00:05, 00:10, 00:15, 00:20, and 00:30.
- The portion that is paid. For example, you can indicate that 15-minute breaks are paid and that one-hour lunches are unpaid.

Note that when creating schedules, the Schedule service verifies that all the work condition activities can be applied as configured. If there is no valid time where all the work condition activities can be applied as configured, the Schedule service ignores the work condition activity with a warning in the log and debug files.

The Schedule service applies the work condition activities with the smallest minimum delay first (in chronological order). It prefers to adhere to the work condition configuration rather than to the service queue need.

One way to avoid scheduling conflicts is to use the following parameter assignments:

- Morning break maximum delay = lunch minimum delay – lunch minimum interval – morning break duration
- Lunch minimum delay = morning break maximum delay + morning break duration + lunch minimum interval

Example 1: Work Condition without Unpaid Activities

A contact center has created three work condition activities: Morning Break, Lunch, and Afternoon Break. Work shifts are eight hours long. The start and end times of work shifts are variable: start times can be as early as 07:30 and end times as late as 17:30.

The work condition activities are configured as follows.

Activity	Min Delay	Max Delay	Duration	Min Interval
Morning Break	01:30	03:00	00:15	00:00

Activity	Min Delay	Max Delay	Duration	Min Interval
Lunch	03:00	05:00	00:30	01:30
Afternoon Break	05:30	06:45	00:15	01:30

If an agent's work shift begins at 08:00, then that agent's morning break can start any time between 09:30 and 11:00. The agent's lunch can start any time between 11:00 and 13:00. The agent's afternoon break can start any time between 13:30 and 14:45.

For example, assume that to handle predicted call volume, WFM must schedule an agent to begin work at 08:00 and to take a lunch break from 11:00 to 11:30. WFM then schedules the agent's morning break from 09:30 to 09:45 to satisfy the minimum delay of 01:30 for that work condition activity.

However, the earliest that lunch can start is 11:15 (09:45 plus 01:30, the minimum interval between this and the previous activity). WFM cannot create a schedule that satisfies all of the parameters as configured. This situation can be corrected by decreasing the minimum delay of the morning break from 1:30 to 01:15, or by decreasing the lunch minimum interval to 01:15.

Example 2: Work Condition with Unpaid Activities

A contact center has created three work condition activities: Morning Break, Lunch, and Afternoon Break. The lunch break is unpaid time. Work shifts are eight hours long, but since there is a one-hour unpaid lunch, the work shift actually spans nine hours. The Schedule service will schedule nine hours for the agent.

The start and end times of work shifts are variable: start times can be as early as 07:30 and end times as late as 18:30.

Activity	Min Delay	Max Delay	Duration	Min Interval
Morning Break	01:15	03:00	00:15	00:00
Lunch	03:00	05:00	01:00 (unpaid)	01:30
Afternoon Break	08:00	08:30	00:15	01:30

If an agent's work shift begins at 08:00, then the agent's morning break can start any time between 09:15 and 11:00. The agent's lunch can start any time between 11:00 and 13:00.

The agent's afternoon break can start any time between 16:00 and 16:30. This allows for the one hour unpaid lunch. It adds the hour and allows you to put in a delay of 08:00, something you couldn't do if the lunch were a paid activity. You cannot have a delay that is the same length of the work shift unless there is unpaid time included, in this case, the agent's schedule spans a period of nine hours.

Scheduling and Unpaid Activities

Work conditions do not always extend shifts to accommodate unpaid activities.

For normal scheduling (standard work shifts, dynamic scheduling, and dynamic availability), the work conditions that are applied will extend the shift to meet the paid and unpaid hours of the shift. For

example, if an agent is scheduled for an eight hour shift and the eight hour paid hours work condition that is applied includes an unpaid one hour lunch break, then the shift is scheduled to cover an actual period of nine hours to accommodate the one hour unpaid lunch break plus eight hours of paid activities.

For other types of events that work conditions apply to, such as intraday dynamic scheduling and partial day offers and trades, work conditions do not extend shifts for unpaid activities. For example, if an agent picks up two hours of overtime in an intraday scheduling event from 3:00 p.m. to 5:00 pm, a two hour shift length work condition might be applied, and if that two hour work condition contains an unpaid 30-minute lunch break, then it will be placed within the two hour segment and not extend it. The overtime shift will continue to be 3:00 p.m. to 5:00 p.m. and not beyond, and the agent will be paid for 1.5 hours, not two hours.

Managing Work Conditions

Use the Work Conditions page (Application Management > Schedules > Work Conditions) to create, edit, and delete work conditions.

The fields on the Work Conditions page (when you create, edit, or delete a work condition) are described below.

Field	Description
What Do You Want To Do?	Choose whether you want to edit or delete an existing work condition, or create a new one.
Work Condition Name	Enter a name for the work condition that makes it easy to identify when assigning the work condition to agents, for example, Customer Service - 4.5 hours. You can also use this field to change the name of an existing work condition.
Work Condition Type	Specify the type of work condition: ■ Paid hours–(Default) When you select paid hours-based work conditions, the system extends the shift length due to unpaid breaks and lunches. ■ Shift length–When you select shift length-based work conditions, the system does not extend the shift length due to unpaid breaks and lunches.
Allow paid hours to be a range	Only appears you select Paid Hours in Work Condition Type. Click to enter a minimum and maximum number of paid hours.
Minimum Paid Hours	Appears if you select the Allow paid hours to be a range. Enter the minimum number of paid hours (in HH:MM) for the work condition.

Field	Description
Maximum Paid Hours	Appears if you select the Allow paid hours to be a range. Enter the maximum number of paid hours (in HH:MM) for the work condition.
Allow shift length to be a range	Only appears you select Shift Length in Work Condition Type. Click to enter a minimum and maximum shift length.
Minimum Shift Length	Appears if you select the Allow shift length to be a range. Enter the minimum shift length (in HH:MM) for the work condition.
Maximum Shift Length	Appears if you select the Allow shift length to be a range. Enter the maximumshift length (in HH:MM) for the work condition.
General Condition	Select the "This is a general condition" check box if this work condition applies to every work shift with the same number of hours or range of hours of work per day, and if no other work condition is associated with those work shifts. If you do not select the check box for a work condition and no other work condition is linked to a work shift or work condition profile associated with the agent, WFM will not schedule breaks or lunches to agents assigned to this work shift. **Note**: There can be only one general condition per scheduled shift length or paid hours to which the work shift is applied. Only general conditions and work conditions associated with work condition profiles assigned to agents are used in dynamic availability and partial day offers and trades.
Earliest Shift Arrival Time	Select the "Apply work condition to work shifts with any arrival time" check box if you want the work condition to apply to work shifts with any arrival time, or specify a time if you want the work condition to apply to work shifts that begin at or later than a specific arrival time. These options are mutually exclusive, you can select only one of them.
Days to Include	Select the days to which this work condition applies. Defaults to all selected. You must include at least one day.

Field	Description
Activities	Click Add to add a row to the Activities table, and then specify the details of the activity. These include: • Name: Enter a name to describe the break or lunch. If you leave this field empty, WFM fills it with Break. • Type: Select Break or Lunch from the drop-down list. • Min Delay: Enter the minimum amount of time in hh:mm format that must elapse between the shift start time and the start of this activity. This value must be in multiples of five minutes; if anything else is entered, the value is rounded to the nearest five minutes. • Max Delay: Enter the maximum amount of time in hh:mm format that can elapse between the shift start time and the start of this activity. This value must be in multiples of five minutes; if anything else is entered, the value is rounded to the nearest five minutes. • Duration: Enter the length of time the activity lasts in hh:mm format. This value must be in multiples of five minutes; if anything else is entered, the value is rounded to the nearest five minutes. Activities with a value of zero (0) are ignored. • Increment: Select the increment during an hour when the activity can begin. For example, if the activity can start one hour after the shift start of 08:00 and you choose the 15-minute increment, the activity might start at 09:15, 09:30, or 09:45. • Min Interval: Enter the minimum amount of time between this and the previous activity. This value must be in multiples of five minutes; if anything else is entered, the value is rounded to the nearest five minutes. • Paid Portion: The portion of the activity in hh:mm format that is paid. Activities that are not paid extend the work shift by the unpaid duration for paid hours work conditions. For example, an eight-hour work shift with a one-

Field	Description
	hour unpaid lunch will become a work shift that spans nine hours. There is a limit of 48 hours in a work condition. • Color/Color ID: Click the color field to select a color to represent this activity in the schedule. The color ID is the hex code for the selected color.
Maximum Optimization Adjustment	Allows you to control the amount of time the intraday lunch and break optimizer can move a break or lunch forward or backwards within the activity constraints. If the value is empty, the optimizer can move the activity as far as the activity constraints allow. If the value is zero (0), the activity cannot be moved.
Assign Work Condition Profiles	Assign one or more work condition profiles to the work condition.
Assign Work Shifts	Assign one or more work shifts that will use this work condition. This field is only visible when the work condition type is Paid Hours

Work Condition Button Definitions

Button	Description
Save	Click to save the new or changed work condition. This button is disabled until a work condition is named or selected, and all populated fields are valid.
Delete	Click to delete the work condition. This button is disabled until a work condition is named or selected.
Cancel	Click to cancel changes to the work condition.

Work Condition Profiles

Work condition profiles allow you to associate non-general work conditions with agents instead of associating them only with work shifts. Using work condition profiles, you can optimize an agent's intraday lunches and breaks, and automate moving agent's breaks and lunches to improve service queue's coverage.

Only administrators and schedulers can assign work condition profiles.

You should create work condition profiles that include paid hours work conditions, so agents will be scheduled with work conditions. You should also create work condition profiles that include shift

length work conditions, if agents might be doing partial day trades/offers or intraday dynamic scheduling.

Every work condition profile includes a set of agents and work conditions. An agent or work condition is not required to be included in a work condition profile.

Note: An agent can only be included in a *single* work condition profile; however, multiple work conditions can be included in a work condition profile, and a work condition can be a member of multiple work condition profiles.

Scheduling with Work Condition Profiles

The Schedule service can use work conditions in the agent's work condition profile to schedule the agent's lunches and breaks. The work conditions are applied to the agent's work shift on a specific date.

Managing Work Condition Profiles

Use the Work Condition Profiles page (Application Management > Schedules > Work Condition Profiles) to create, edit, and delete work condition profiles.

The fields on the Work Conditions Profile page (when you create, edit, or delete a work condition profile) are described below.

Field	Description
What Do You Want To Do?	Choose whether you want to edit or delete an existing work condition profile, or create a new one.
Work Condition Profile Name	Enter the work condition profile's name.
Assign Work Conditions	This field allows you to select and assign specific work conditions to the work condition profile. The same work condition can be included in multiple work condition profiles.
Assign Agents	This field allows you to select and assign agents to the work condition profile. **Note**: An agent can only be assigned to one work condition profile.

Shift Budget Analysis Request

A shift budget analysis request (Application Management > Schedules > Shift Budget Analysis Request) generates the data needed to analyze shift costs for one or more service queues.

Note: There must be a production forecast for the period you want to analyze for the request to run successfully.

Once you have run this request, you can run a shift budget analysis report.

To run a shift budget analysis request:

1. Enter a start date and end date for the period whose data you want to analyze.
2. Select one or more service queues.
3. Add the parameters of the shifts you want to analyze. Click Add to add a row to the table, and then for each row, enter the shift parameters:
   - Select the shift length from the drop-down list.
   - Enter the desired utilization percentage. This is the percentage of time agents are in service.
   - Enter the maximum number of agents available to work. If you want WFM to determine this, enter 9999.
   - Select the days of the week you want to use in the analysis. Select All to select each day of the week in one click.
4. Enter a run date and time to schedule the request. If you do not specify a later date and time, the request runs immediately.
5. Click Submit.

Shrinkage

Contact center shrinkage is how much time is lost in the contact center due to unscheduled off-phone activities. Reasons for shrinkage include a wide range of events that result in agents logged off the phone during their normal schedule. Depending upon the time frame being evaluated and what is currently scheduled, shrinkage events can include (but are not limited to) vacations, 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 queue by the shrinkage percentages configured in this table.

The number of agents available to work when a schedule is run is typically 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.

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 exception 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 page (Application Management > Schedules > Shrinkage) 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.

The Shrinkage 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.

Note: Shrinkage is applied only if that option is selected when making the schedule request. The shrinkage values configured at the time of the request are applied to that request. For example, if you schedule a schedule request with shrinkage for a future date and then change the shrinkage values before that date, the new shrinkage values are not used.

Managing Shrinkage

To enter shrinkage percentages for your contact center:

1. Determine how many weeks out you want to enter shrinkage percentages. The Shrinkage table can accommodate up to 13 rows, the current week plus 12 weeks into the future. To add a row, click Add at the bottom of the table. New rows are always added at the bottom. To delete a row, select the row you want to delete and click Delete 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.

Min/Max Hour Conditions

Min/Max hour conditions specify the minimum and maximum paid hours per day, paid hours per week, and days per week that agents can work. It can be assigned at the service queue and the individual agent level.

- "Day" refers to the shift day, including shifts that cross midnight, not a calendar day.
- "Week" refers to the shift week, not a calendar week.

Configuring Min/Max hour conditions is optional. It is required if you want agents to be scheduled using dynamic availability work shifts.

Min/Max hour conditions assigned at the agent level take precedence over those assigned at the service queue level. If conditions are not available at the agent level, then conditions assigned at the service queue level apply. If no conditions are assigned at any level, existing functionality is not affected.

Min/Max hour conditions factor into the following scheduling methods:

- Standard work shift-based scheduling
- Dynamic scheduling
- Dynamic availability
- Intraday dynamic scheduling
- Manually edited schedules
- Trades, offers, exceptions, mentoring, and time off

Use the Min/Max Hour Conditions page (Application Management > Schedules > Min/Max Hour Conditions) to create, edit, delete, assign, and copy Min/Max hour conditions.

The fields on the page when you create, edit, or delete conditions are described below.

Field	Description
Min/Max Hour Condition Name	Enter a unique name for the condition.
Min Hours per Week	Enter the minimum number of paid hours per week that an agent can work.
Max Hours per Week	Enter the maximum number of paid hours per week that an agent can work.
Min Days per Week	Enter the minimum number of days per week that an agent can work.

Field	Description
Max Days per Week	Enter the maximum number of days per week that an agent can work.
Apply To	Select the day or days of the week whose parameters you want to configure. Use Shift-Click to select multiple contiguous days, or Ctrl-Click to select specific days.
Shift Length Min	Enter the minimum paid hours for the selected day of the week.
Shift Length Max	Enter the maximum paid hours for the selected day of the week.
Minimum Interval Between Shifts	Enter the minimum amount of time that can exist between shifts on different days.

Assigning Min/Max Hour Conditions

Choose the "Assign Min/Max hour conditions" option to assign conditions to service queues or agents.

To assign conditions:

1. Choose the level at which you want to assign conditions, service queue or agent.
2. From the drop-down list, select the service queue or agent you are assigning conditions to.

   Note: Only conditions assigned to the agent's main service queue will be used if the agent does not have conditions assigned, not service queues associated with the agent via skill mapping or multiskill group.

3. Select the "Use default condition" check box if you want the condition you are assigning to be the default condition, and select the condition from the drop-down list. Default conditions apply whenever there is no condition assigned to a specific date range for the service queue/agent.

   Note: If you do not configure a default condition and no conditions are configured for a specific date range for an agent at either the agent or service queue level, that agent will be scheduled with no minimum or maximum hour restrictions.

4. Add conditions to the Date Range Conditions table. Click Add to add a row to the table, then select the start week, end week, and the condition to use for that date range for that service queue or agent.

> **Note**: Only one Min/Max hour condition can be assigned to a specific service queue or agent per week.

Your date selection defaults to the first day of the week (for start week) and the last day of the week (for end week) no matter what day you choose during those weeks.

> **Note**: If you do not have any specific date range conditions configured and you clear the "Use default condition" check box and click Save, you will receive an error. To delete the Min/Max hour condition assignment you must click Delete.

5. Continue adding conditions to the table as desired. When you are finished, click Save.

Copying Min/Max Conditions

You can copy the min/max conditions assigned to an agent or service queue to other agents or service queues using the "Copy Min/Max conditions" option.

The copy works differently depending on if you are copying one condition to one or more service queues or agents, or copying multiple conditions to one or more service queues or agents.

- When copying one condition, you must specify the date range the condition applies for the recipient service queues or agents.
- When copying multiple conditions, the date ranges of those conditions are copied to the recipient service queues or agents and overwrite any existing conditions for those date ranges.

To copy one condition:

1. Select the service queue or agent whose condition you want to copy.
2. From the Date Range Conditions table, select the condition to copy.
3. Choose a start week and end week.
4. Select one or more service queues or agents to copy the condition to.
5. Click Copy.

To copy multiple conditions:

1. Select the service queue or agent whose conditions you want to copy.
2. From the Date Range Conditions table, select the conditions to copy.

3. Select one or more service queues or agents to copy the conditions to.
4. Click Copy.

Interaction with Work Shifts

If an agent has a valid min/max hours condition assigned for the schedule week, its values (applied across all work shifts) are used instead of the min/max hours and days per week and minimum interval (for between shift days) settings in any variable work shifts assigned to that agent for the week.

> **Example:** A variable work shift with all optional days and minimum days per week of five has only two of its days scheduled because the maximum days per week in the min/max hours condition is two.

- Only paid hours (in service, paid breaks and lunches, paid exceptions, and paid projects) are counted for min/max hours.
- The hours per day and per week are for the schedule week, not the period week.
- Paid hours in work shifts from the previous week that cross midnight to the current week are not counted.
- The hours per day of the week are for the shift date, not the period date.
- The hours and days per week and per day of the week include all the work shifts for the agent for the schedule week.

Note the following:

- The sum of work shift hours for a shift day is capped at 24 hours even if the sum exceeds 24 hours.
- The scheduler will try to accommodate min/max hours for exceptions, but the partial day/full day exceptions can still result in agents being scheduled but with errors appearing in the log.
- The scheduler does not count paid partial day exception time when scheduling work shifts, but these can result in agents being scheduled but with errors appearing in the log.
- While scheduling the agent, if work shifts overlap because of extensions for unpaid events or split shifts, it results in a min/max hours violation.
- Min/max hours condition assignment start dates for agents and service queues that do not match the configured first day of the week, or end dates that do not match the day before the configured first day of the week, are ignored.

Violations

Violations that result in an agent not being scheduled for the week

General:

- The agent has no valid work shift for the schedule week.
- The minimum interval from the min/max hours condition, dynamic availability, variable work shift (done while scheduling)
- Overlapping work shifts that results in min/max hours per day/week or min/max days per week to be violated (done while scheduling)
- Cross schedule week that results in min hours per day/week or min days per week or min interval to be violated

Dynamic scheduling/traditional work shifts:

- Sum of number of required day of week in work shift(s) is greater than max days per week
- Sum of number of configured days of week in work shift(s) is less than min days per week and agent is active and employed for whole week
- Sum of minimum work shift(s) for week exceeds max hours for week
- Sum of maximum work shift(s) for week is less than min hours for week and agent is active and employed for whole week

Variable work shifts:

- There are no valid combinations of optional days in the variable work shifts combined with fixed/assignment work shifts such that the maximum days per week and maximum minutes per week are met.
- The sum of the minimum shift length of all work shifts for a shift day exceeds the maximum hours for the day of the week
- The sum of the maximum shift length of all work shifts for a shift day is less than the minimum hours for the day of the week and the agent is active and employed for the date

Violations that result in an agent being scheduled for the week but with errors

- The agent is only employed for part of the schedule week, causing a minimum hours/days of the week violation.
- There are unpaid (both partial and all day) exceptions that result in minimum hours per day/week or minimum days/week to be violated.

- There are paid (both partial and all day) exceptions that result in maximum hours per day/week or maximum days/week to be violated.

Schedule Release Profiles

By default, an agent's schedule becomes visible based on the Global Setting: Number of Weeks Visible in Agent Schedules. Use the Schedule Release Profiles page to adjust the schedule release cycle for individual date ranges and agents.

Schedule release profiles override the default schedule release and can be used to delay and/or provide advance schedule visibility for one or more date ranges. Schedules for dates not specified in a schedule release profile continue to become visible according to the default Global Setting: Number of Weeks Visible in Agent Schedules.

To create and assign a schedule release profile:

1. Enter a unique name for the schedule release profile.
2. Under Manage Schedule Release Dates, click **Add Date**.
   a. Enter the Start Date and End Date of the range of dates for which you want to adjust schedule visibility.
   b. Enter the Release Date on which you want to release the schedule for the specified range of dates.

   Note: A schedule release profile can include multiple date ranges with separate release dates.
3. Under Assign Agents, select one or more agents to assign to this schedule release profile.
4. Click **Save**.

Example: If today is November 1 and the Global Setting: Number of Weeks Visible in Agent Schedules is set to 6 weeks, an agent's schedule for November 1–December 12 is visible by default. If you want to provide agents advance schedule visibility for December 18–31, create a schedule release profile with a Start Date of 2016-12-18 and an End Date of 2016-12-31. Set the Release Date on which you want to release the schedule for these dates. Schedules for all other dates continue to become visible according to 6-week default.

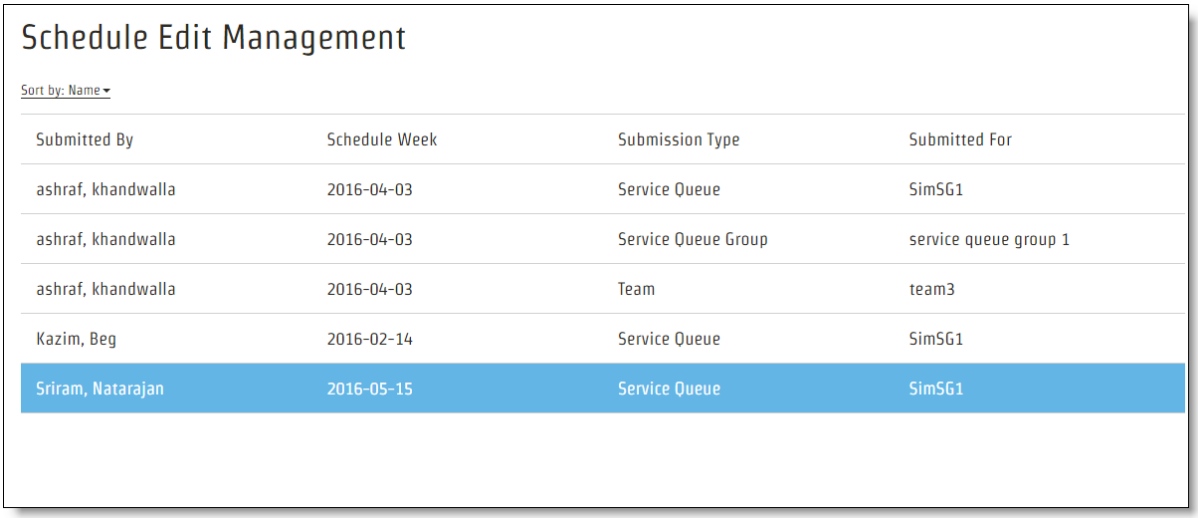
An agent can only be assigned one schedule release profile, which may include multiple date ranges with individual release dates. You can see which schedule release profile an agent is assigned (if any) or assign a new schedule release profile on the Agents page. See *Agents* for more information.

If you want to automatically assign a particular schedule release profile to new agents, you can select it in Global Settings: Schedule Release Profile. See *Global Settings* for more information.

Note that adjusting schedule visibility might impact an agent's ability to request a schedule trade, schedule offer, or mentoring request. For an agent to make a request of these types, the schedule date (or dates, if trading schedules for different days) must be visible to both the requesting agent and the responding agent.

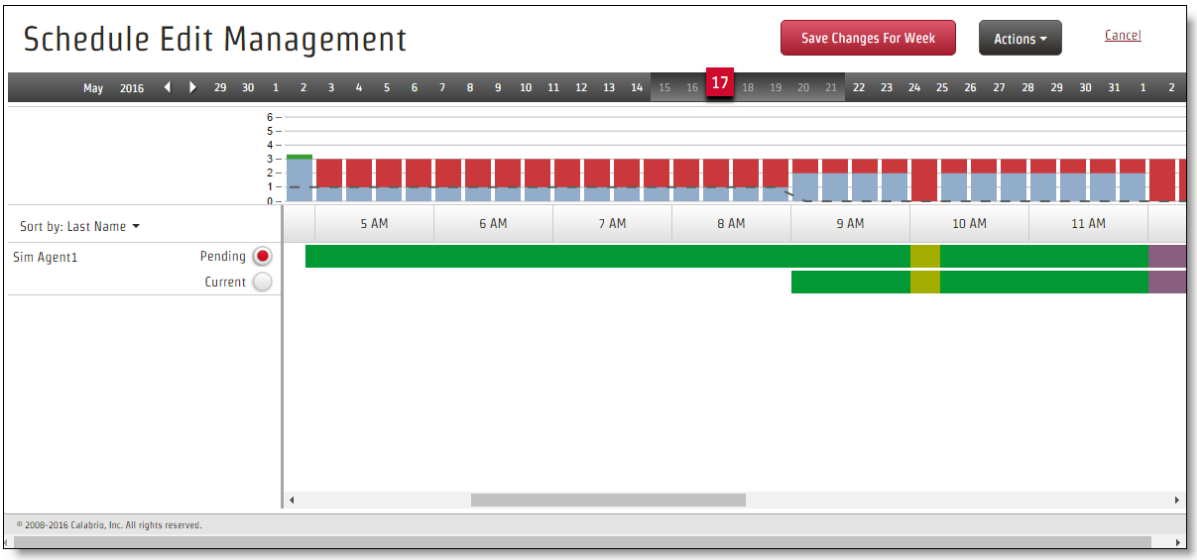
Schedule Edit Management

The Schedule Edit Management page (Application Management > Schedules > Schedule Edit Management) is available to administrators and schedulers. It lists schedule edits made by supervisors whose editing capabilities are controlled by a schedule editing rule (see *Schedule Editing Rules*) and who are included in a schedule edit event workflow. The edits made by these supervisors are on hold until they are approved or denied by an administrator or scheduler.



When you click one of entries, a page showing the changes made by the supervisor is displayed. This page shows each agent's current schedule and the pending schedule with the supervisor's proposed changes.

You can view how coverage and staffing are affected by the change by toggling between the Pending and Current options for each agent. Hover your mouse over any of the bars at the top of the schedule to display the number of agents forecast and scheduled for the interval.



To approve or deny schedule changes:

1. To approve a schedule change, select the Pending option next to the agent's name. To deny a schedule change, select the Current option.

   > **Note:** You can select all pending or all current schedules at once from the Actions button on the toolbar.

2. Click Save **Changes for Week**.

Dynamic Schedules

Dynamic scheduling, intraday dynamic scheduling, and dynamic availability enable selected agents to create their own schedules.

- *Dynamic Scheduling* enables selected agents to create their own schedules in advance.
- *Intraday Dynamic Scheduling* allows selected agents to revise their schedules when a service queue is overstaffed or understaffed. The agents are given the opportunity to take voluntary time off or overtime as needed by the staffing requirements of their service queue.
- *Dynamic Availability Rules* enables agents to configure their own work availability for specific weeks.

Dynamic Scheduling

Dynamic scheduling provides contact center agents with an active role in the creation of their work schedules while maintaining an appropriate balance between staffing needs, work rules, and agent preferences.

Before agents can schedule themselves using dynamic scheduling, you must configure WFM as follows:

1. Create a dynamic scheduling work rule. The work rule specifies the parameters for the work shift the agent will be scheduling—hours worked per week, starting times, days worked, and so on. See *Dynamic Scheduling Work Rules*
2. Configure the dynamic scheduling associations between a work rule, a specific work week, and an agent. This association gives the agent the opportunity to create a schedule for the specified work week. Note that a dynamic scheduling event can cover more weeks than the agent has an association for. For example, if an agent has an association for Week 1 and Week 2, but the dynamic scheduling event covers Week 1, Week 2, and Week 3, the agent will only be able to create a schedule for Week 1 and Week 2. See *Dynamic Scheduling Associations*
3. Configure the dynamic scheduling event. Choose the weeks that the agents can schedule themselves for, and then configure the dynamic scheduling event exception that will be added to the selected agents' schedules so they have a specific time to create their own schedules. See *Dynamic Scheduling Events*

A scheduling event exception is added to each agent's schedule according to the agent's ranking or seniority and availability in the contact center. By default, while computing the event exception times, the highest ranked agent gets the first opportunity to schedule him or herself, the second highest agent gets second opportunity, and so on down the list of selected agents.

> **Note**: The order in which the scheduling event exceptions are assigned to agents can be manually changed by administrators or schedulers before submittal.

There are factors that affect when the scheduling event exception fits into an agent's schedule. You can configure which activities can be overwritten by the event exception, and if the exception can be scheduled during a period when the agent is not available. If an agent's schedule is such that the exception cannot be added to it, the agent is scheduled automatically by WFM as usual.

You can also specify how long a gap there can be between sequential event exceptions. If Agent B is not available immediately after the time when Agent A's exception is scheduled and a gap of more than the configured number of minutes exists, then Agent B is skipped over and Agent C is scheduled next instead. Agent B's event exception will be added to the schedule as soon as possible, but Agent B will not get a chance to create a schedule in the order of his or her rank.

Dynamic Scheduling Work Rules

A dynamic scheduling work rule is used to set the parameters for the work shifts for dynamic scheduling. Work rules are assigned to agents for specific weeks.

Managing Dynamic Scheduling Work Rules

The Dynamic Scheduling Work Rules page (Application Management > Dynamic Schedules > Dynamic Scheduling Work Rules) allows you to create, edit, and delete work rules that apply to dynamic scheduling.

Note: Dynamic scheduling does not support split shifts.

The fields on the page when you create, edit, or delete a work rule are described below.

Field	Description
Work Rule Name	Enter a unique name for the work rule.
Activate this work rule	Select this check box to activate the work rule. It must be activated in order for it to be available for use.
Work Rule Type	Select the type of work rule this is. • Uniform. The agent's work shift starts at the same time every day. Hours per day and per week are fixed. • Hybrid. The agent's work shift can start at a different time every day. Hours per day and hours per week are fixed. • Variable. The agent chooses start time, shift length, and weekly hours within the defined parameters.
Work Rule Parameters	The work rule parameters depend on the type of work rule you selected.
Shift Length	(Uniform, Hybrid) Length of the shift, in hours.
Hours per Week	(Uniform, Hybrid) Calculated read-only field: shift length × number of work days selected.
Earliest Start Time	(Uniform, Hybrid, Variable) The earliest time that the shift can be scheduled to start.
Latest Start Time	(Uniform, Hybrid, Variable) The latest time that the shift can be scheduled to start.
Minimum Hours per Shift	(Variable) The minimum number of hours the agent can work in the shift.

Field	Description
Maximum Hours per Shift	(Variable) The maximum number of hours the agent can work in the shift.
Minimum Hours per Week	(Variable) The minimum number of hours the agent can work in a week.
Maximum Hours per Week	(Variable) The maximum number of hours the agent can work in a week.
Minimum Consecutive Scheduled Days	(Variable) The minimum number of consecutive days the agent is required to work.
Minimum Interval Between Work Shifts	(Uniform, Hybrid, Variable) The minimum number of hours between the end of one work shift and the start of the next work shift.
Non-consecutive days off/Consecutive days off	(Variable) Choose if days off during the week can be non-consecutive or must be consecutive.
Work Days	(Uniform, Hybrid) The days of the week that agents must be scheduled to work. By default, Monday through Friday are selected.

Note: It is strongly recommended that you use work condition profiles to optimize an agent's intraday lunches and breaks.

Dynamic Scheduling Associations

The Dynamic Scheduling Associations page enables you to set up an association between a specific work week, a work rule, and agents.

When those agents are given the opportunity to create their own schedules for a specific work week, the work rule that was associated with that week and those agents determines what options those agents will have when selecting their schedules.

You can set up associations for as many weeks in the future as you choose. For every week, an agent can be associated with only one work rule, but that work rule can change from week to week.

Managing Dynamic Scheduling Associations

The Dynamic Scheduling Associations page (Application Management > Dynamic Schedules > Dynamic Scheduling Associations) allows you to configure and manage the association between a specific week, a work rule, and an agent.

Use this page to build a list of work rule/agent associations for the selected week. The Agents table can list more than one work rule, but an agent can be associated with only one work rule per week.

Example: Select Work Rule A and associate agents 1, 2, 3, and 4 with it by moving their names to the Assigned pane. Next, select Work Rule B and associate Agents 5, 6, 7, and 8 with that work rule by moving their names to the Assigned pane.

The Agents table shows the agents you have selected for dynamic scheduling, the work rule they will use to schedule themselves, and their rank and company start date (used to determine the order in which they will be able to schedule themselves). You can sort the table by any column in ascending/descending order by clicking the column header, or filter the table by agent name.

Once you have configured and saved the dynamic scheduling associations for a specific week, you can copy them to other weeks using the Copy function.

The fields on the page are described below.

Field	Description
Work Week	Select the starting date of the week you want agents to choose their own schedules. If you select a date that is not the configured first day of the week, WFM automatically changes your selection to the first day of the week of the selected week.
Work Rule	Select the work rule you want to use. The work rules listed in the drop-down list are those configured and active on the Dynamic Scheduling Work Rules page.
Agents	Select the agents who will schedule themselves according to the selected work rule for the selected week and move their names to the Assigned pane.
Copy	Select the starting date of one or more weeks other than the one you configured in the Schedule Date field and then click Copy. This copies the work rule and agents you configured to those weeks. The Copy function is not enabled until you have saved the configured associations.

Dynamic Scheduling Events

The Dynamic Scheduling Events page (Application Management > Dynamic Schedules > Dynamic Scheduling Events) is used to set up the rules for the exception that will be added to the schedules of agents who are invited to create their own schedules.

Managing Dynamic Scheduling Events

The Dynamic Scheduling Events page is used to create, review, edit, and delete a dynamic scheduling event. It can also be used to generate a report of any scheduling incentives offered for a specified date range.

The event exception is applied to the selected agents' schedules as soon as you save the event.

Note: If a schedule is rerun, the dynamic scheduling event exceptions are overwritten. You can reinsert them into the agents' schedules by resaving the event. (Make a small change in the event to enable the Save button, such as adding a character to the event name.)

When creating and editing an event, complete fields as described below.

Field	Description
Event Name	Enter a unique name for the event.
Schedule Start Date	Select the start date of the period to be scheduled. The start date defaults to the configured first day of the week containing the date you choose.
Duration (Weeks)	Enter the number of weeks you want to schedule.
Exception	Select the exception you want to use for the event. This is the exception that appears in agent schedules.
Display staffing numbers on the dynamic scheduling grid display	Select this check box if you want the dynamic scheduling grid the agent sees to display staffing needs as numbers as well as icons.
Incentive Description	Optional field. Enter a description of an incentive you will offer to encourage agents to schedule themselves for a less desirable work shift. The description can be a maximum of 60 characters.
Agents	The Agents table displays the agents who are assigned an active dynamic scheduling work rule for the weeks you chose in the Schedule Start Date and Duration fields and who have not yet been assigned a dynamic scheduling event.
Calculate Signup Times	Click Calculate Signup Times to configure details of the dynamic scheduling event and compute the day and time the selected agents are assigned dynamic scheduling exceptions. If you change the selected agents (for example, removing agents from the right pane) click the button again to recompute days and times.
Calculate Signup Times popup window	
Duration Tab	
Event Start Date	Enter the start date for the event. This is the first date that the exception can appear in agent schedules.

Field	Description
Event Start Time	Enter the start time for the event. This is the earliest time that the exception can appear in agent schedules on the start date. For example, if the start date is 23 September and start time is 08:00, you can select 07:00 on 24 September as long as that is within the end date and time.
Event End Date	Enter the end date for the event. This is the last date that the exception can appear in agent schedules.
Event End Time	Enter the end time for the event. This is the latest time that the exception can appear in agent schedules on the end date.
Event Length (Minutes)	Enter the length of the event, in minutes. This is the amount of time that the agent will have to create his or her schedule.
Gap (Minutes)	Enter the maximum number of minutes that can exist between the end of an exception and the start of the next exception for sequentially ranked agents. If Agent B's schedule is such that the exception cannot be added to his or her schedule within the configured gap after Agent A's exception, Agent B's exception will be scheduled at the first available time slot and Agent C's exception will be scheduled in Agent B's originally intended time slot.
Activities Tab	
Activities That Can Be Overwritten	Select the schedule activities that can be overwritten by the event exception. If you choose "Not Available", you must complete the Start Time and End Time fields.
Start Time	(Visible only if Not Available is selected as an activity that can be overwritten) Enter a start time for the range during which the Not Available activity can be overwritten.
End Time	(Visible only if Not Available is selected as an activity that can be overwritten) Enter an end time for the range during which the Not Available activity can be overwritten.
Groups Tab	

Field	Description
Maximum Agent Percentage for Group Scheduling	Enter the maximum percentage of agents that can be scheduled in groups. This means that these agents will have a dynamic scheduling event added to their schedules in the same time slot, and those agents will all be creating their own schedules at the same time. **Example**: Enter 75 in the field to schedule 75 percent of your agents in groups. This means that 25 percent of your agents will be scheduled as individuals.
Maximum Group Size Percentage	Enter the maximum size of the scheduling group as a percentage of the total number of agents being scheduled. **Example**: You want to schedule 100 agents in groups, but want each group to be no more than 20 agents. To get this result you enter 20 (percent) in this field.

Reviewing an Event's Status

Schedulers and administrators can use the “Review, edit, or delete an existing dynamic scheduling event” option to monitor the current status of a dynamic scheduling event and review and edit submitted agent schedules.

The Agents table lists all the agents who are assigned the event, and each agent’s event status. Possible statuses are:

- Pending
- Completed
- Missed

You can revise the list of assigned agents if desired, and then calculate the agent exception times for newly assigned agents, newly assigned agents and agents who missed the event, or all assigned agents. Once you select which agents you want to include in the revised event, go through the tabs on the Calculate Signup Times popup window and revise the information there as needed. When you click Calculate Signup Times in the popup window, new signup events are generated for the selected agents.

You can also review submitted agent schedules and edit them. Editing the schedules must be done before the actual schedule is run. To review or edit a schedule, click the agent’s Pending or Completed link in the Status column to view their Agent Dynamic Scheduling page. If you edit the schedule, click Submit when you are finished.

If an agent has missed an event, you can create a schedule for that agent and submit it by clicking the Missed status link.

Generating a Scheduling Incentives Report

Use the Generate a scheduling incentives report option to view a listing of all scheduling incentives offered and accepted for a specified date range and for specified agents.

The report can be viewed on the Dynamic Scheduling Events page, or exported as a spreadsheet in CSV format.

To generate a scheduling incentives report:

1. On the Dynamic Scheduling Events page, select the Generate a scheduling incentives report option.
2. Select a date range and the agents you want to report on.
3. Click Display Report to view the report on the page, or Export as CSV to generate a file that can be opened in Excel or other spreadsheet applications.

Intraday Dynamic Scheduling

Intraday dynamic scheduling allows you to offer selected agents the opportunity to take voluntary time off, overtime, or both when you want to change staffing to meet the current conditions. As generated, the schedule might have overstaffed or understaffed the service queue. Intraday dynamic scheduling allows you to fine-tune your staffing.

The schedule changes can be for the current day or a day in the future. These agent-initiated schedule changes can be configured to require approval or go into effect immediately without any approval needed.

From the Intraday Dynamic Scheduling page (Application Management > Dynamic Schedules > Intraday Dynamic Scheduling) you can:

- Browse a service queue's schedule coverage
- Create a new intraday dynamic scheduling event
- View a list of existing intraday dynamic scheduling events

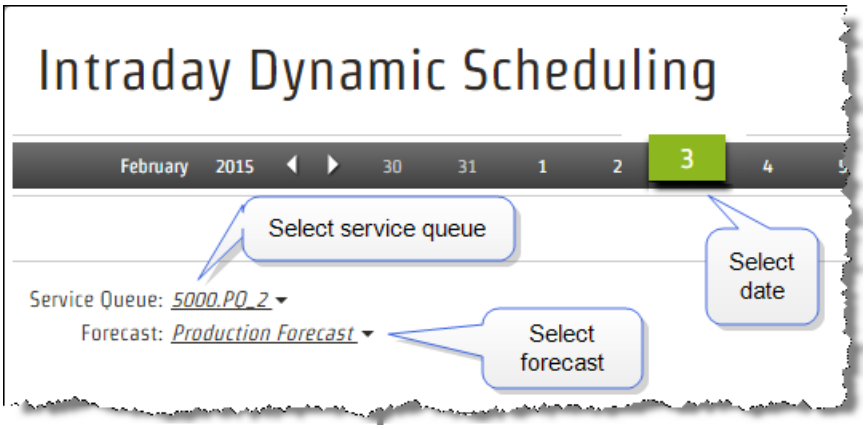
Note: It is strongly recommended that you use work condition profiles to optimize an agent's intraday lunches and breaks.

Browsing

The Intraday Dynamic Scheduling page opens in the Event view, which lists all existing events. Click Browse and then select a service queue from the drop-down field to display that service queue's schedule for the current date. You can choose a different date if desired.

Once you have displayed the schedule for a specific service queue, you can browse to display the schedules for other service queues.

- Change the service queue by selecting another one from the Service Queue drop-down field.
- Change the date displays by selecting a different date on the calendar bar. You can select today's date or any date in the future.
- Change the forecast used to generate the coverage displayed on the page by selecting a named forecast from the Forecast drop-down field. You can also select "Reforecast" to reforecast the schedule. Changing the forecast used can help you determine the staffing levels you need on the selected day. Note that Reforecast can be used only for the current date.



Viewing Existing Events

Click the Event button (upper right corner of the Intraday Dynamic Scheduling page) to view a list of existing events for the current date and future dates. You can click any of the listed events to view the Intraday Dynamic Scheduling Events page for that event. If the event is ongoing, a countdown clock showing how much more time is left for agents to sign up for the event is displayed at the top of the page.

The fields in the list are described in the following table.

Field	Description
Settings	Click this button to view, edit, or delete the intraday dynamic scheduling event.
Type	The type of change to the schedule: VTO (voluntary overtime), TO (time off), or both.

Field	Description
Event Name	The name of the intraday dynamic scheduling event. Click the event name to view the Intraday Dynamic Scheduling page for the event.
Service Queue	The service queue that the listed event applies to.
Schedule Date	The date of the amended schedule.
Status	These three numbers are, from left to right: • The number of agents whose schedule changes have been approved (Approved) • The number of agents who have submitted a schedule change but that haven't been approved yet (Pending) • The total number of agents invited to participate in the event (Total Agents Assigned)

Creating a New Intraday Dynamic Scheduling Event

Click the Create Event button (upper right corner of the Intraday Dynamic Scheduling page) to create a new event.

The fields on the Intraday Dynamic Scheduling Events page are described below.

Field	Description
Intraday Dynamic Scheduling Event Name	Enter a unique name for the event.
Deadline Date	Enter the date when the responses from agents invited to change their schedules are due.
Deadline Time	Enter the time on the date when the responses from agents invited to change their schedules are due.
Approve agent schedule changes automatically	Select this check box if you want agents' schedule changes to go into effect automatically. If cleared, all agent schedule changes must be approved manually.
Select Service Queue	Select the service queue whose schedule you want to change.
Schedule Date	Select the date of the schedule change period.
Change Start Time	Enter the start time of the schedule change period in 24-hour format.

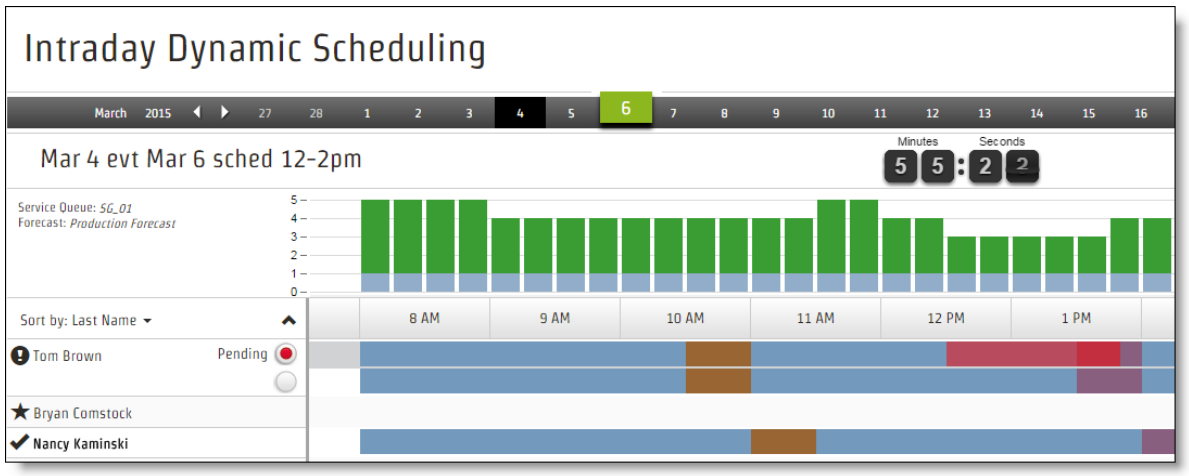
Field	Description
Change End Time	Enter the end time of the schedule change period in 24-hour format.
Select Forecast	Select the forecast used to indicate staffing needs for the date of the schedule change. You can choose the production forecast, a named forecast, or an intraday reforecast.
Schedule Change Option	Choose the kind of schedule change you want to offer selected agents: • Voluntary time off • Overtime • Both voluntary time off and overtime
Minimum Time Off	Enter the minimum amount of time off an agent can take. This field appears when the Voluntary Time Off or Both schedule change option is selected.
Maximum Time Off	Enter the maximum amount of time off an agent can take. This field appears when the Voluntary Time Off or Both schedule change option is selected.
Minimum Overtime	Enter the minimum amount of overtime an agent can take. This field appears when the Overtime or Both schedule change option is selected.
Maximum Overtime	Enter the maximum amount of overtime an agent can take. This field appears when the Overtime or Both schedule change option is selected.
Allow multiple time off selections	Select this check box to allow agents to take time off in multiple segments within the schedule change period–that is, the time off does not have to be contiguous. This check box appears only when the Voluntary Time Off or Both schedule change option is selected.
Allow multiple overtime selections	Select this check box to allow agents to take overtime in multiple segments within the schedule change period–that is, the overtime does not have to be contiguous. This check box appears only when the Overtime or Both schedule change option is selected.
Force a minimum gap between the shift and the start of overtime	Select this check box if you want to require there be a minimum amount of time between the agent's regular shift and the start of overtime.

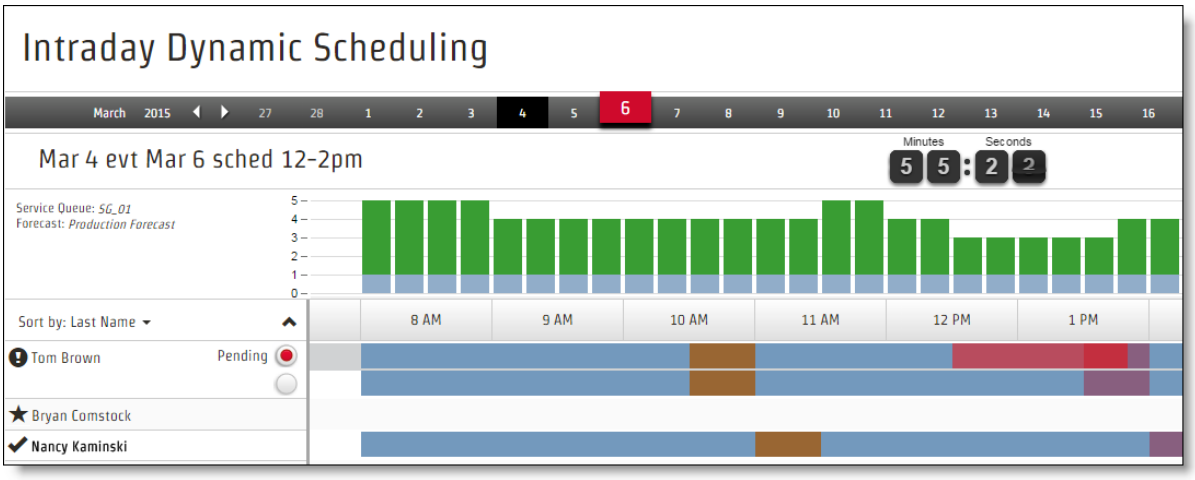
Field	Description
Minimum Gap Duration	Enter the minimum amount of time that can occur between the agent's regular shift and the start of overtime.
Staffing Goal Threshold	Enter the amount of overstaffing (positive number) or under-staffing (negative number) allowed during each interval in the schedule change period.
Exception to be Used	Select the exception to be used for the voluntary time off in the agent's schedule.
Agents	Select the agents you want to invite to participate in the intraday dynamic scheduling event. The agents listed in the Available pane are those who are supporting the service you selected. **Note**: An invited agent might not be able to take part in the event because the agent's schedule does not work with the event's requirements. In that case, the agent sees a message that selecting time off or overtime is no longer available for the event.

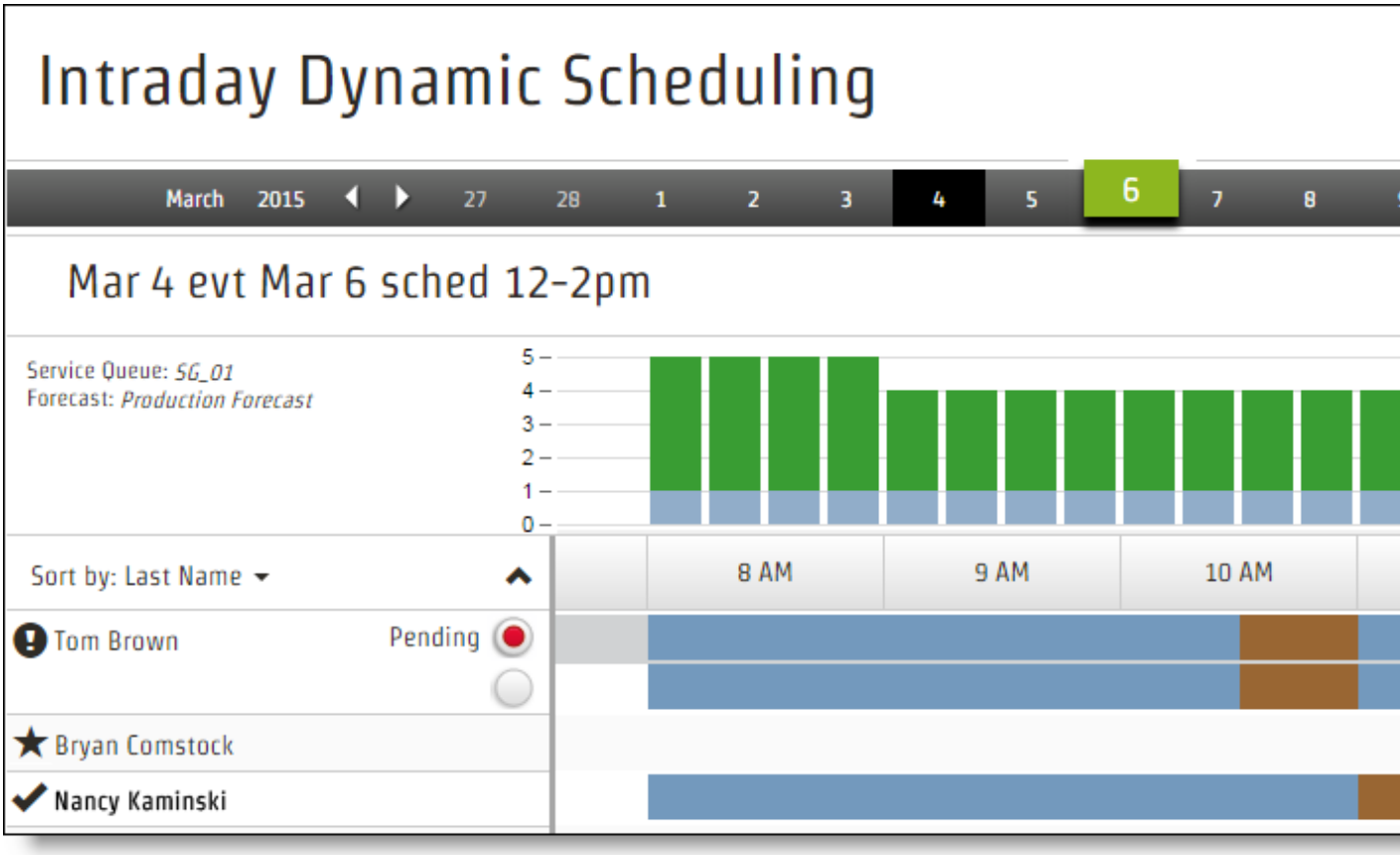
Approving Schedule Changes

If an Intraday Dynamic Scheduling event is configured to automatically approve agent schedule changes (the "Approve agent schedule changes automatically" check box is selected) then the schedule change appears immediately in the agent's schedule.

Agent schedule changes that need approval appear on the Intraday Dynamic Scheduling page for that event.







The names of the agents who have been invited to take part in an intraday dynamic scheduling event are marked with one of three icons.

- A star denotes an agent who has been invited to participate in the event, but who has not yet replied.
- A check mark denotes an agent who has made schedule changes and those changes were approved, either automatically or manually.
- An exclamation point denotes an agent whose changes are waiting for manual approval.

If an agent's changes are waiting for your approval, there are two schedule bars next to the agent's name. the upper bar is the proposed schedule (pending) and the lower bar is the agent's existing schedule. When you toggle between the agent's current schedule and the agent's pending changed schedule, the coverage updates to help you decide if you want to accept the pending change or not.

To accept the proposed schedule, select the Pending option and then click the Approve button on the toolbar.

Note: You cannot deny an agent's schedule change, but not approving the proposed schedule change keeps the agent's current schedule in place. The agent's proposed schedule change remains pending and can be approved at a later date. The proposed schedule change drops off the page when the date has passed.

Dynamic Availability Rules

Dynamic availability enables agents to configure their own work availability for specific weeks.

A dynamic availability rule is used to set the parameters for agent availability. Dynamic availability rules are assigned to agents for specific weeks or starting at a specific week and extending for an indefinite period. The agents configure their availability for those periods according to the parameters set out by the rule. Once approved, those availabilities are used as a variable type work shift to schedule agents in conjunction with their assigned min/max hour conditions.

Managing Dynamic Availability Rules

The Dynamic Availability Rules page (Application Management > Dynamic Schedules > Dynamic Availability Rules) allows you to create, edit, delete, assign, and manage work rules that apply to agent availability.

The fields on the page when you create, edit, or delete rules are described below.

Field	Description
Rule Name	Enter a unique name for the rule.
Apply To	Select the one or more days of the week you are configuring. Use Ctrl-Click to select multiple non-contiguous days.

Field	Description
Type	Configure if the agent must work, can work, or cannot work on the selected days of the week. In the chart, days an agent must work appear dark gray; days an agent can work appear light gray; and days an agent cannot work are left blank. Selected days are highlighted in blue in the chart.
Duration	(This field appears if the Type is "cannot work".) Configure the earliest start time and latest end time for the work shift on the selected day. Enter the time in 24-hour format. When you click outside the start and end time fields a bar showing the shift duration is displayed on the graph. **Note**: When configuring duration, make sure there is sufficient time allowed for shift extension due to unpaid work condition activities.
Smallest Shift Length Allowed	Enter the shortest shift length allowed on any day in hours with 15-minute increments.
Maximum Number of Shifts	Enter the number of shifts on any one day that an agent can work (split shifts).
Minimum Length of Time Between Shifts	(This field appears if the maximum number of shifts is greater than 1.) Enter the amount of time that must occur between shifts on the same day.

Assigning Rules to Agents

After a rule has been configured, it can be assigned to agents.

Note: An agent can only have one dynamic availability rule for a specific week. If a dynamic availability rule is assigned to a week that already has a dynamic availability rule assigned to it, the new assignment will be used for the specified weeks.

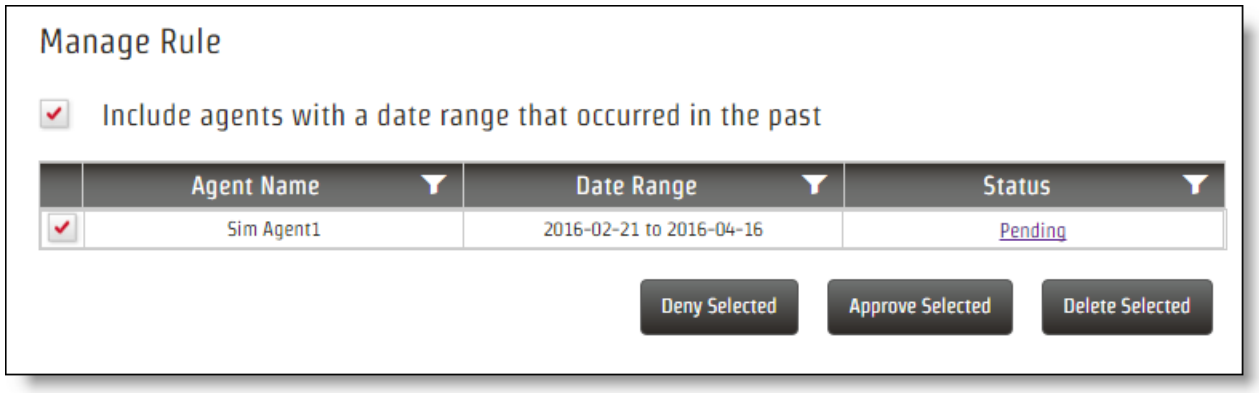
The fields on the page when you choose to assign a rule to agents are described below.

Field	Description
Rule Name	Select the rule you want to assign to agents.
Agents	Move the agents you want to assign the rule to from the Available pane to the Assigned pane.

Field	Description
Start Date	Choose a start date for the rule. If you select a date that is not the beginning of a work week, the date automatically defaults to the first day of the week selected.
Rule is indefinite	Select this check box if you do not want the rule to have a definite end date. When selected, the End Date field disappears.
End Date	Choose an end date for the rule. If you select a date that is not the end of a work week, the date automatically defaults to the last day of the week.
Approve agent dynamic availability request automatically	Select this check box if you want requests that meet the parameters set up for the rule to be approved automatically. If left clear, all dynamic availability requests must be approved by an administrator, scheduler, or supervisor.

Managing Assigned Rules

Use the "Manage assigned rules" option to view a table of all agents assigned a selected dynamic availability rule for a date range in the future. You can opt to also list agents who were assigned the rule for a date range in the past.



From this table you can view each agent's dynamic availability request status. Clicking the status takes you to the agent's My Availability page to view all the details of the request.

When you select an agent in the table, buttons appear below the table that enable you to deny, approve, or delete the selected agent's availability request. The action you can take depends on the status of the selected agent's request. For example, if the status is Approved, the actions you can take are Deny Selected and Delete Selected. If you select multiple requests with different statuses, the actions you can take are those that are common to all of the selected statuses. For example, if you select requests with Approved and Denied statuses, the only action available to you is Delete Selected because that action is available to both Approved and Denied requests.

You can filter the table by any column by clicking the Apply Filter icon on the column header.

Activities

The pages in this section of Application Management enable you to set up and manage exceptions, projects, and workflows.

The pages are:

Exceptions

Exceptions are activities that take agents away from being in service. Examples of exceptions are meetings, training, and time off.

Exceptions are assigned in any of three ways:

- Requested by agents via an Exception Request for either past and future dates. This type of exception must be approved by the agent's supervisor before it is applied to the schedule.
- Assigned to agents before a schedule is run by a supervisor or scheduler. When generating a schedule, WFM applies the exception to the agent's schedule and moves breaks to accommodate it. WFM also attempts to schedule another agent to work on that date to ensure that requirements are covered for the service queue.
- Assigned to agents after a schedule is run by a supervisor or scheduler using the Agent Schedules page. Assigning exceptions post-production ensures that the schedule accurately reflects current conditions, and that a history of exceptions is saved.

A list of agents assigned a specific exception can be generated by the Reports application (Assigned Exceptions report).

When an exception is applied to a schedule, WFM applies the exception to conform to these rules:

- An exception must appear within the agent's work shift available hours. The excess time will not appear in the agent's schedule.
- The maximum length of the exception is adjusted to the maximum availability of the agent if the duration of the exception is greater than the agent's availability.

- An exception is applied on the dates and times specified unless it occurs on a day the agent has no work shift.
- The length of an exception that is shorter than the maximum number of work hours is deducted from the maximum number of work hours for the work shift. For example, if the work shift is a maximum of 8 hours and the exception for that day is 4 hours, the agent is scheduled for a maximum of 4 hours.
- If multiple exceptions are assigned to an agent on the same date, the exceptions are applied from newest to oldest such that exceptions that are applied later will not overwrite an existing exception. For example, if Exception A was applied from 9–11 am and then Exception B is applied from 10 am–12 pm, 9–11 am will have Exception A and 11 am–12 pm will have Exception B.

Managing Exceptions

The Exceptions page (Application Management > Activities > Exceptions) allows you to create, edit, delete, and assign exceptions.

> **Best Practices:** It is recommended that you do not delete exceptions that are no longer used if they were previously assigned to agents. If they are deleted, the historical data associated with them will be lost. Deactivate the exceptions instead.

The fields on the page when you create, edit, or delete an exception are described below.

Field	Description
Exception Information	Enter a unique name for the exception. Maximum length is 50 characters.
Activate	Select the check box to activate the exception and make it available for use. If you clear the check box, the exception will no longer be available for use.
Paid	Select the check box if the activity is a paid activity. This setting can be overridden when the exception is assigned to an agent.
Hyperlink URL	If the agent should visit a web page to perform the exception activity, enter the URL of that web page here. You must use the full URL (including http, https, and www as needed). The URL appears in the exception in My Schedule.
Text to Display	Enter optional text that will appear as a hyperlink in the exception instead of the URL.
Color	Select a color to represent this exception in the schedule.

Field	Description
Agents Assigned to This Exception	To view a list of agents who have been assigned this exception, run the Assigned Exception report from the Reporting application.

The fields on the page when you assign an exception to agents are described below.

Field	Description
Exception	Select the exception you want to assign from the drop-down list.
This exception is a paid activity	By default this check box shows the paid status assigned to the exception. You can select or clear the check box to override that setting when assigning the exception.
Agents	Select the agents you want to assign the exception to. By default the available pane shows all agents; you can filter the agents by clicking the Show All button and selecting a team.
Dates	Enter the start date and end date of the exception activity. You can also enter a start date and then specify a number of occurrences for a recurring activity. If you enter a number of occurrences, the End Date field is disabled.
Duration	Enter a start and end time for the activity, or choose Entire Day. WFM automatically calculates the length of time and shows it in the Hours field.
Frequency	Choose the frequency of the activity–day, week, month, or year.
Occurrence	Depending on your choice of frequency, this displays the options you can choose to set the daily, weekly, monthly, or yearly occurrence.

The following examples demonstrate how you can set the frequency and occurrence of daily, weekly, monthly, and yearly exceptions.

Example 1: To assign an exception that occurs only once, use these settings: Start Date and End Date— the same date; Frequency—Day; Daily Occurrence—Every 1 days.

Example 2: To assign an exception that occurs once a week on Monday for 10 weeks, use these settings: Start Date—date of the first Monday in the series; Number of Occurrences—10; Frequency—Week; Weekly Occurrence—Every 1 weeks, and then select Monday from On These Days. Selected days are blue, non-selected days are white.

Example 3: To assign an exception that occurs once a month on the second Monday for 12 months, use these settings: Start Date—date of the first Monday in the series; Number of Occurrences—12; Frequency—Month; Monthly Occurrence—select the second option and complete the statement "The second Monday of every 1 months."

Example 4: To assign an exception that occurs once a year on January 15 for 5 years, use these settings: Start Date—the first January 15 in the series; Number of Occurrences—5; Frequency—Year; Yearly Occurrence—select the first option and complete the statement "Every January on this date: 15".

Exception Types

An exception type is a generic or high-level exception that agents select when requesting an exception.

Note: To view and change exception type settings, users must either be Administrators or Schedulers with the Enterprise View, or be Administrators or Schedulers who are Workflow Administrators. These users can create and edit all exception types.

If you think your agents will select an appropriate exception type when requesting time off, you can create exception types that are less generic. If you think your agents will not select an appropriate exception type, you can create a small number of very broad exception types and ask agents to include a descriptive comment when they request time off.

Example: An agent has a doctor's appointment, so when requesting time off, she selects the exception type "Sick Leave" and then types a comment indicating that the request is for a doctor's appointment. This exception type serves as a placeholder until the agent's supervisor approves the request. When approving the request, the supervisor enters the specific exception "Doctor's Appointment."

Best Practice: We recommend that multi-national companies create separate exception types for each country in which they operate.

Managing Exception Types

Use the Exception Types page (Application Management > Activities > Exception Types) to create, edit, and delete exception types.

The fields on the page are described below.

Field	Description
Exception Type Name	Enter a unique exception type name. Maximum length is 50 characters.
Default Exception	Select an exception to be the default workflow exception used for this exception type. A default exception must be specified for each exception type for Exception and Mentoring requests to be approved by a workflow.

Projects

A project is an activity that prevents agents from responding to contacts. Projects are generally assigned to optimize the use of agent idle time when contact volume is low. These activities occur each work shift and can be assigned for one or more days per week.

WFM examines the coverage for every interval and schedules a project for a time when it has the least impact on coverage. If an agent is assigned multiple projects, WFM also looks at the priority assigned to each project and schedules the project with the highest priority first.

Example: You designate some of your agents to work on two projects and assign a priority to each project. If WFM generates the schedules for the two projects and discovers there are not enough agents to support all forecast requirements across both projects, it compares the priority value for the two projects. WFM then schedules agents for the project with the highest priority first. Note that if the agent has min/max hour conditions assigned, an unpaid project would not be scheduled if doing so would violate the minimum hours per day or week.

Projects are applied only to an agent's in-service periods when that agent is not needed, closed service periods, and assignment periods.

Managing Projects

Use the Projects page (Application Management > Activities > Projects) to create, edit, and delete projects.

Best Practices: It is recommended that you do not delete projects. If you delete a project, all the historical data associated with it is lost.

Note: You cannot delete a project if it is currently scheduled.

The fields on the page are described below.

Field	Description
Project Name	Enter a unique project name.
Priority	Enter a number from 0 to 9 to describe the project priority, with 0 being the highest priority.
Hyperlink URL	If the agent should visit a web page to perform the project, enter the URL of that web page here. You must use the full URL (including **http**, **https**, and **www** as needed). The URL appears in the project activity in My Schedule.
Text to Display	Enter optional text that will appear as a hyperlink in the project activity instead of the URL.
Paid	Select the check box if this project is a paid activity.
Activate	Select this check box to activate the project. A project cannot be scheduled until it is activated.
Start Date/End Date	Enter the start and end dates of the period agents can be scheduled to work on the project.
Start Time/End Time	Enter the start and end times of the period during which agents can be scheduled to work on the project.
Schedule Increment	Enter the schedule increment that determines the intervals in which the project can start. For example, if you choose an increment of 15 minutes and the start time is 08:00, then agents could start working on a project at 08:00, 08:15, 08:30, and so on.
Days Agents Can Work on the Project	Click the days on the bar to indicate which days of the week agents can be scheduled to work on the project. Selected days are blue. By default, every day of the week is selected.
Minimum Duration	Enter the minimum length of time that agents can be scheduled to work on the project for the day. This value can not be less than the Duration Unit, and must be a multiple of the Duration Unit.
Maximum Duration	Enter the maximum length of time that agents can be scheduled to work on the project for the day. This value must be a multiple of the Duration Unit and must be at least the same as the Minimum Duration.

Field	Description
Duration Unit	Enter the basic block of time that agents are scheduled to work on the project. For example, if the duration unit is 30 minutes and an agent is scheduled to work on the project for 60 minutes during the work shift, that time could be two sequential duration units that totals 60 minutes, or one 30-minute duration unit in the morning and another 30-minute duration unit in the afternoon.
Limit the total number of hours spent on this project per week	Select the check box if you want to limit the total number of hours spent on the project per week. When the check box is selected the Maximum Hours per Week option appears.
Maximum Hours per Week	Enter the maximum number of hours per week an agent can work on this project, and select one of two options to indicate if the agent can work multiple days per week or only one day per week on the project.
Agents	Select the agents who are to work on the project.
Color	Select a color to represent this project in the schedule.

Workflows

Workflows provide a way to automate the handling of agent requests. One workflow can be configured for each type of event. There is an event for every type of agent request submission.

Each event has a set of rules, and each rule has a list of conditions. When a rule's conditions are met, then the action configured for that rule is performed and subsequent rules are not evaluated. Rules are evaluated in the order in which they appear in the Rules table. If the event does not meet any of the configured rules, then the default rule goes into effect.

Note: To view and change workflow settings, users must either be Administrators or Schedulers with the Enterprise View, or be Administrators or Schedulers who are Workflow Administrators. All of these users have Enterprise View while working with workflows.

Workflow Example

Let us assume that you want to set up a workflow for the Exception Request event. You want there to be two rules: one for approving the exception request, and one for denying the exception request.

Note: If an agent submits a time off request for a day on which that agent has no scheduled activities, the request is processed with manual handling instead of being approved automatically.

Approve Rule

In this example, for an exception request to be automatically approved, the request has to meet two conditions: the requester has to support the Email service queue and have a rank of 5 or higher.

The conditions for the Approve rule look like this:

Variable	Operator	Value
Match all of the following conditions		
Service queue	Equal to	Email
Rank	Greater than or equal to	5

The action that is taken if these conditions are met is Approve.

Deny Rule

For an exception request to be automatically denied, the requester must meet either of two conditions: the agent is not scheduled and eligible for activities, or the agent has been employed by the company for 60 days or fewer.

The conditions for the Deny rule look like this:

Variable	Operator	Value
Match any of the following conditions		
Agent is scheduled and eligible for activities	Equal to	False
Days between agent company start date and evaluation date	Less than or equal to	60

The action that is taken if these conditions are met is Deny.

Default Rule

The Default rule is executed if all other rules are not met. As a result there are no conditions associated with it. The Default rule is present in every workflow event and is always the last in the Rules table. In this example, the action taken if none of the other rules are met is Manual Handling.

Automatic Denial

The following conditions trigger the automatic denial of a request.

Note: Automatic denial will occur whether or not there are workflow rules configured if these trigger conditions are met.

Request Type	Trigger Conditions
Exception	The agent is not active. The agent is not employed for the request dates.
Mentoring	Either agent is not active. Either agent is not employed for the request dates. The request date is in the past, including if the request date is the current date but the time is in the past. The request start time is the same as the request end time.
Time Off	The agent is not active. The agent is not employed for the request dates. The default FTE per day configured in Global Settings is not positive. The agent does not have an FTE profile assigned. The request date is in the past, including if the request date is the current date but the time is in the past. The request has an overlapping date and time range. The request has identical start and end times.

Request Type	Trigger Conditions
Trade/Offer	Either agent is not active. Either agent is not employed for the request dates. The request is for a schedule date in the past or the current date. The request's expiration date is in the past or the current date. The request's desired date is in the past or the current date. Offer: The receiving agent already has scheduled activities other than Available/Not Available in the time where the copied scheduled activities will be placed. Offer: The offering agent has no scheduled activities on the schedule date. Trade: The agent has scheduled activities other than Available/Not Available in the time where the copied scheduled activities will be placed if that is not being traded away. Trade: The offering agent has no scheduled activities on the schedule date or the receiving agent has no scheduled activities on the desired date.

Automatic Manual Handling

The following conditions trigger the automatic manual handling of a request.

Note: Automatic manual handling will occur whether or not there are workflow rules configured if these trigger conditions are met.

Request Type	Trigger Conditions
Exception	The request would have been approved but the workflow exception for the exception type in the request is inactive. The request would have been approved but no workflow exception was specified for the exception type in the request. The request would have been approved but the agent does not have available work shift periods within the request date/time range.

Request Type	Trigger Conditions
Mentoring	The request would have been approved but the workflow exception for the exception type in the request is inactive. The request would have been approved but no workflow exception was specified for the exception type in the request. The request would have been approved but there are no periods within the request date/time range where both agents have available work shift periods.
Time Off	The request would have been approved but no exception associated with the specified vacation type is a workflow exception, or the workflow exception for the specified vacation type is inactive or is no longer associated with the specified vacation type. The request would have been approved but the agent does not have available work shift periods within the request date/time range.
Trade/Offer	None.

Managing Workflows

Use the Workflows page (Application Management > Activities > Workflows) to create and edit workflows for agent request events.

The fields on the Workflows page are described below.

Field	Description
Select Event	Select the event whose workflow you want to edit.
Rules table	The Rules table lists all rules configured for the selected event. Use the up and down arrows to reorder the rules within the list. The Default rule is always last in the list and cannot be moved or deleted. You can add, copy, or delete rules using the buttons below the table.
Rule Name	Enter a unique name for the rule. This name is added to a request's Comment section when the request is processed successfully by the workflow.
Activate this rule	By default a rule is activated. It will not be evaluated if this check box is cleared.

Field	Description
Conditions	Use this section to build the list of conditions for the rule. Conditions can be nested up to five levels deep. Click the plus (+) button at the end of a condition row to add another row. Click the minus (–) button to delete the current condition row. Click the ellipsis button (...) to add a sub condition group. See *Building Conditions* for more information.
Action	Select the action to take when the conditions in the rule are met. • Approve: The request is approved. • Deny: The request is denied. • Manual Handle: The request must be approved or denied by a supervisor. • Wait List: The request is neither approved or denied, but is in a holding pattern. WFM continues to evaluate the request on a daily basis until a rule with a different action evaluates as true, or the request is handled manually.

Building Conditions

The Conditions section allows you to build conditions that an event must meet in order for a rule to evaluate as true. Conditions are sets of AND and OR statements, and can contain up to five nested levels.

Note: It is possible to build rules and conditions that cannot work or where later rules will never be evaluated. WFM does not validate the rules and conditions you build. It is recommended that you carefully review the logic of your rules and conditions to ensure they do what you want them to do.

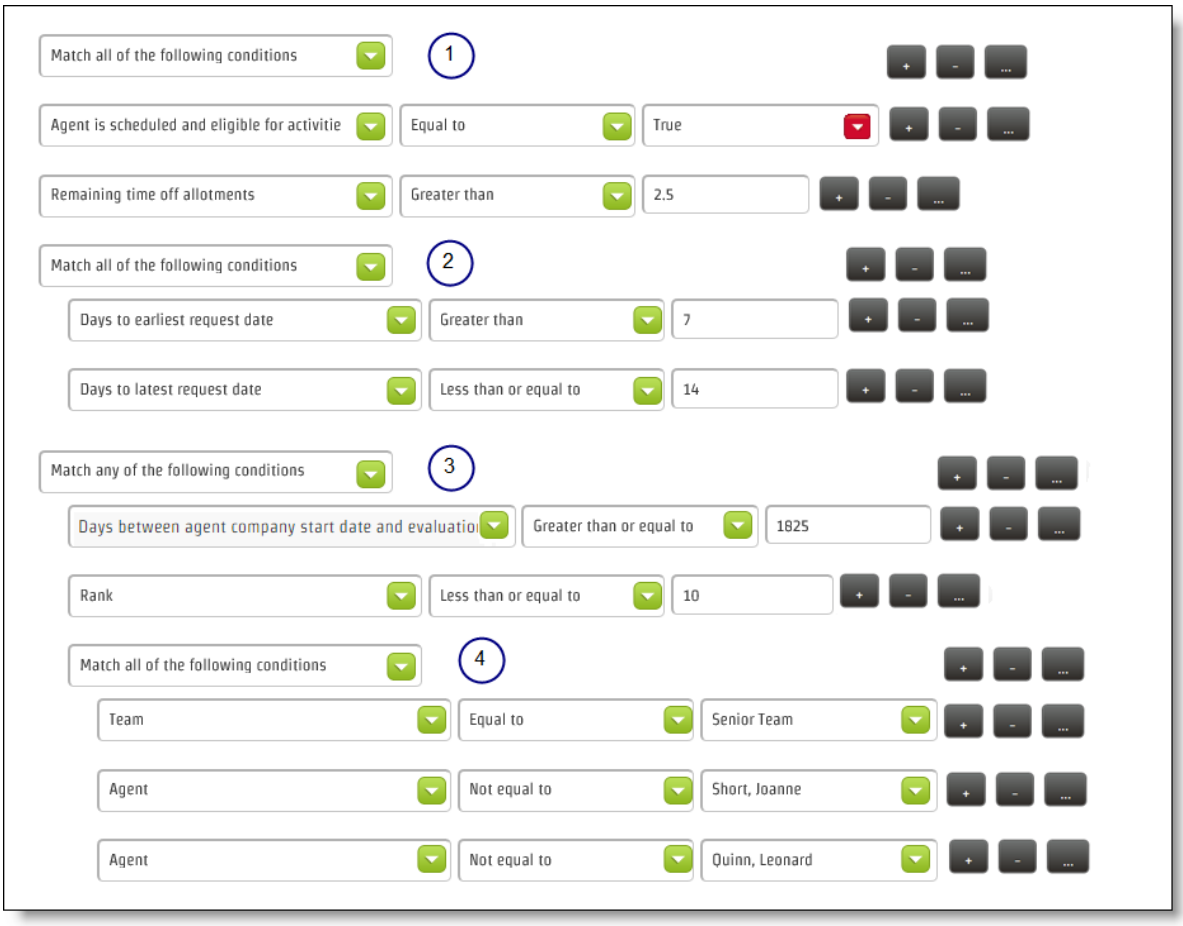
Every level of a condition set is an AND statement ("match all of the following conditions") or an OR statement ("match any of the following conditions"). In general, you alternate AND and OR statements when nesting conditions. If the primary statement for the condition set is an AND statement, nesting another AND statement immediately under it makes no difference, although you might want to do that to visually group some condition statements that relate to each other in some way.

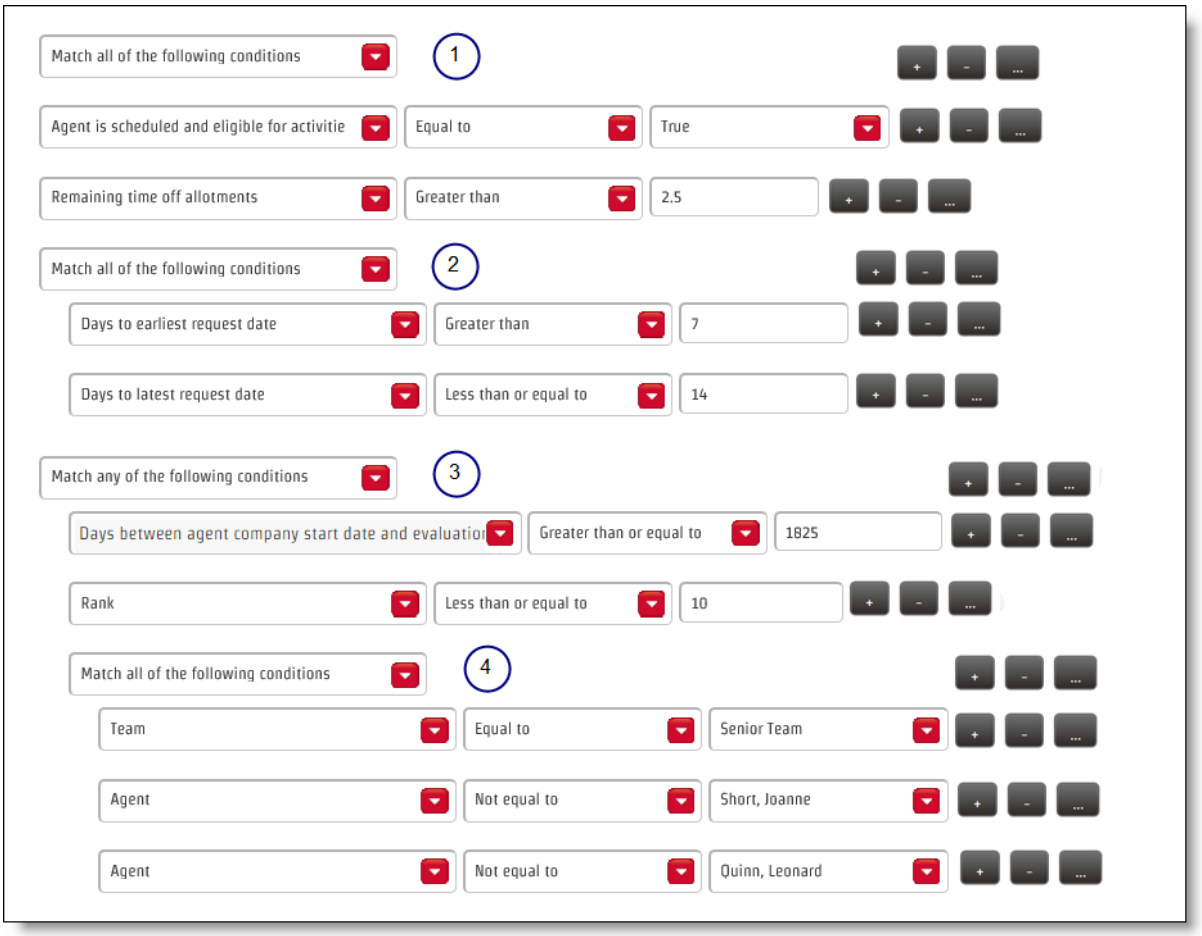
Each condition row has three components: the variable, the operator, and the value (a few variables have a fourth component: percentage). The operators and types of values are dependent on the variable you choose. At the end of the row is three buttons.

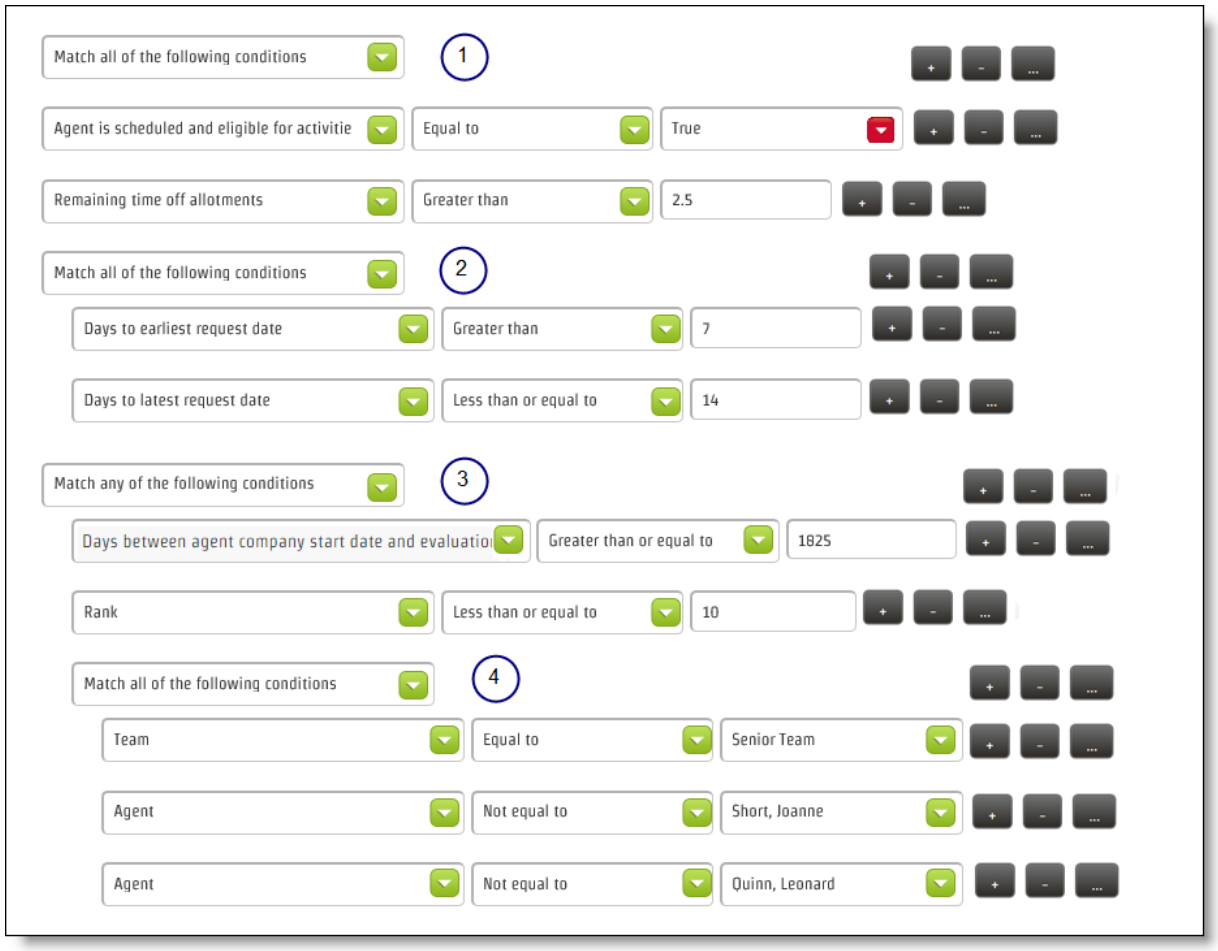
- The plus (+) button adds a new condition row at the same level as the current row
- The minus (—) button deletes the current row

- The ellipsis (...) button adds a new AND or OR statement nested below the current row

The following is an example of a condition set that has three nested levels. The callout numbers are explained below.




Match all of the following conditions
1
Agent is scheduled and eligible for activitie
Equal to
True
Remaining time off allotments
Greater than
2.5
Match all of the following conditions
2
Days to earliest request date
Greater than
7
Days to latest request date
Less than or equal to
14
Match any of the following conditions
3
Days between agent company start date and evaluatio
Greater than or equal to
1825
Rank
Less than or equal to
10
Match all of the following conditions
4
Team
Equal to
Senior Team
Agent
Not equal to
Short, Joanne
Agent
Not equal to
Quinn, Leonard



Callout 1	This AND condition group is the overarching condition group. Each condition statement at this level must be met for the rule to be true.
Callout 2	This AND condition group defines the time period within which the requested dates occur. The request must be for a period between 7 and 14 days from the current date. The conditions in this AND statement could have been placed at the first level. They are grouped to provide a visual cue that they are related.
Callout 3	This OR condition group defines the agents whose request will be considered. The agent must have been employed at least 1825 days before the evaluation date of the request, the agent must have a rank less than or equal to 10, or the condition group in Callout 4 must evaluate as true.

Callout 4	This AND condition group is a sub-condition of the group in Callout 3. It defines the agents whose request will be automatically approved. The agent must belong to the Senior Team, but Joanne Short and Leonard Quinn are excluded for some administrative reason.

Variables

The following table defines the variables available to use in a condition statement. Not every variable is available for every event.

Variable	Description
Agent	The agent's ID (the agent name is displayed). If two agents are involved in the request, the request is checked against both agents. If the operator is Equal to, the condition evaluates to true if either agent ID is equal to the value. If the operator is Not equal to, the condition evaluates to true if both agent IDs are not equal to the value.

Variable	Description
Agent is scheduled and eligible for activities	Whether the agent has scheduled activities for the dates and time ranges in the request. An agent is considered to have scheduled activities for a date and time range if the agent is scheduled for anything except Not Available for the date and within the time range. If the agent has only some of the request's time range scheduled, it is still considered true. If there are two agents involved in the request, the variable is checked against both agents. The variable is true if both agents have schedules for all the dates in the request. For specific types of requests, the variable is true if" • Time Off requests: the agent is scheduled for all the dates/time ranges in the time off choice. • Schedule Offer/Schedule Trade requests: both agents are scheduled for any activities except Available/Not Available. • Schedule Offer requests: the check for the requesting agent is for the schedule date. This check is not done for the responding agent. • Schedule Trade requests: the check for the requesting agent is for the schedule date and the check for the responding agent is for the desired date. • Mentoring requests: both agents must have scheduled activities for the same periods in the time range.
Days between agent company start date and evaluation date	The number of days between the agent's company start date and the request evaluation date. If there are two agents involved in the request, it is checked against both agents. Both agents must evaluate as true for the condition to evaluate as true. Format: number up to 5 digits, cannot be negative
Days between agent department start date and evaluation date	The number of days between the agent's department start date and the request evaluation date. If there are two agents involved in the request, it is checked against both agents. Both agents must evaluate as true for the condition to evaluate as true. Format: number up to 5 digits, cannot be negative

Variable	Description
Days to earliest request date	The number of days from the current date to the earliest date in the request. The current date is the date when the request is evaluated by the workflow. Format: number up to 5 digits, positive or negative
Days to latest request date	The number of days from the current date to the latest date in the request. The current date is the date when the request is evaluated by the workflow. Format: number up to 5 digits, positive or negative
Days to request date	The number of days from the current date to the request date. The current date is the date the request is evaluated by the workflow. Format: number up to 5 digits, positive or negative
Exception type	The exception type selected in the agent request.
Gap between available hours and requested hours	Available hours is based on the Remaining Hours field in the Time Off request. The value can be a decimal. If HRMS integration is not enabled, the number of available hours is calculated at the time the request is processed by the workflow for the vacation year in which the request date falls. If HRMS integration is enabled, the number of available hours is based on the last imported data from the HRMS and is not tied to any vacation year. This value is not adjusted for other time off requests entered since the last HRMS import/export. **Note:** If the entire day is specified for the time off date, the time off per day used is equal to the minimum hours per week for the FTE profile associated with the agent divided by 5. If the agent does not have FTE profile assigned, the condition (and workflow rule) is not applicable. Note that if the minimum hours per week in the FTE profile is 0, the time off hours for the entire time off date is 0 also. Format: number up to 10 digits with 1 decimal, positive or negative

Variable	Description
Gap between scheduled agents and forecast agents	The number of scheduled agents minus the number of agents forecast (worst case for all service queues associated with the agents) for all the dates and time ranges in the request. For every service queue associated with the agent via skill mapping and every member service queue of multiskill groups associated with the agent, the workflow checks every 5-minute period in the request dates and time range to get the difference between scheduled and forecast agents. If the entire day is checked in the request, all the agent's available periods on the date are checked. It will not adjust the scheduled agents for shrinkage. If at least the specified percentage of periods meets the condition, the condition evaluates to true. If there are two agents involved in the request, both agents must evaluate to true for the condition to evaluate to true. For Time Off requests, all the dates in the specified choice must evaluate to true. All of the agents' service queues must have a forecast for the dates, and the agents must have scheduled activities for all the dates and time ranges in the request. This variable has two value fields, one that accepts a decimal and one that accepts a percentage. The decimal field contains the gap value. The percentage field contains the percentage of 5-minute intervals in the dates and time ranges in the request that must meet the condition. Format: number up to 10 digits with 1 decimal, positive or negative

Variable	Description
Gap between scheduled agents with shrinkage and forecast agents	The number of scheduled agents minus the number of agents forecast (worst case for all service queues associated with the agents) adjusted for shrinkage for all the dates and time ranges in the request. The shrinkage week used is the number of weeks between the week when the request is evaluated and the date in the request. If the request time range includes multiple dates, different shrinkage weeks could be used if the dates are on different schedule weeks. For every service queue associated with the agent via skill mapping and every member service queue of multiskill groups associated with the agent, the workflow checks every 5-minute period in the request dates and time range to get the difference between scheduled and forecast agents. If the entire day is checked in the request, all the agent's available periods on the date are checked. It will not adjust the scheduled agents for shrinkage. If at least the specified percentage of periods meets the condition, the condition evaluates to true. If there are two agents involved in the request, both agents must evaluate to true for the condition to evaluate to true. For Time Off requests, all the dates in the specified choice must evaluate to true. All of the agents' service queues must have a forecast for the dates, and the agents must have scheduled activities for all the dates and time ranges in the request. This variable has two value fields, one that accepts a decimal and one that accepts a percentage. The decimal field contains the gap value. The percentage field contains the percentage of 5-minute intervals in the dates and time ranges in the request that must meet the condition. Format: number up to 10 digits with 1 decimal, positive or negative
Paid hours per day	The number of paid hours per day for both agents after the schedule trade or schedule offer for the affected days. This condition validates only when it is true for both agents. Format: number up to 2 digits with 1 decimal, allowable values – 24 to 24

Variable	Description
Paid hours per week	The number of paid hours per week for both agents after the schedule trade or schedule offer for the affected schedule weeks. This condition validates only when it is true for both agents. **Note:** This condition considers only work shifts beginning in the current schedule week. Time belonging to a shift from the previous schedule week does not carry over to the current week. Any time that extends into the current week as part of a shift from the previous week is considered part of the previous schedule week. Format: number up to 2 digits with 1 decimal, allowable values, –168 to 168
Rank	The agent rank. If the agent rank is not specified, it is treated as 99999. If there are two agents involved in the request, both agents must evaluate to true for the condition to evaluate to true. Allowable values: 0 to 99999

Variable	Description
Remaining time off allotments	The number of time off allotments remaining (worst case for all service queues associated with the agent) after the dates in the request choice are applied. ■ For entire days, the time off allotment used is one-fifth the minimum hours per week for the FTE profile associated with the agent divided by the Default FTE per Day as specified in Global Settings. ■ For partial days, the time off allotment used is the date's time range in hours divided by Default FTE per Day as specified in Global Settings. The remaining time off allotment is total allotment - (existing used allotment + time off allotment used for the request for the date). If any of these service queues has no time off allotments configured for any of the dates, the specified choice in the request is considered not applicable and ignored. If all the choices are not applicable, the condition (and workflow rule) is considered not applicable and ignored. If there are no service queues associated with the agents involved in the request, the condition (and workflow rule) is considered not applicable and ignored. Format: number up to 10 digits with 1 decimal, positive or negative
Same schedule week	Indicates whether both dates are for the same schedule week.

Variable	Description
Same service queues	The agents support the same set of service queues. For example, an agent who supports SQ1 and SQ2 via skill mapping is considered to support the same set of service queues as another agent who belongs to a multiskill group that consists of SQ1 and SQ2. If the multiskill group contains more service queues, it does not count as the same. An agent who supports SQ1 via skill mapping is considered to have a different set of service queues than another agent who supports SQ1 and SQ2 via skill mapping. If there are no service queues associated with an agent involved in the request, the agents are considered to support the same service queues only if the other agent also has no associated service queues.
Same team	The agents have a team in common.
Service queue	The service queues associated with the agent through a skill mapping or a multiskill group. If there are two agents involved in the request, it is checked against both agents. If the operator is Equal to, the condition evaluates to true if either agent has a service queue whose ID is equal to the value. If the operator is Not equal to, the condition evaluates to true if both agents do not have any service queues whose ID is equal to the value. If none of the service queues are associated with the agents involved in the request, the condition (and the rule) is considered not applicable and is ignored.

Variable	Description
Service queues have forecast	If there is a forecast for all the dates in the request for every service queue associated with the agent via skill mapping and every member service queue of a multiskill group associated with the agent. If there are two agents involved in the request, it is checked against all of both agents' service queues. For a Time Off request, it is checked against all dates in the specified choice. If there are no service queues associated with the agents involved in the request, the condition (and the rule) is considered not applicable and is ignored.
Team	The name of the team the agent belongs to. If there are two agents involved in the request, it is checked against both agents. If the operator is Equal to, the condition evaluates to true if either agent has a team whose ID is equal to the value. If the operator is Not equal to, the condition evaluates to true if both agents do not have any team whose ID is equal to the value.
Exceeds maximum days per week	The agent's work shift exceeds the maximum days per week set by the min/max hours condition.
Below minimum days per week	The agent's work shift is below the minimum days per week set by the min/max hours condition.
Exceeds maximum hours per week	The agent's work shift exceeds the maximum number of hours per week set by the min/max hours condition.
Below minimum hours per week	The agent's work shift is below the minimum hours per week set by the min/max hours condition.
Exceeds maximum hours per day	The agent's work shift exceeds the maximum hours per day set by the min/max hours condition.
Below minimum hours per day	The agent's work shift is below the minimum number of hours per day set by the min/max hours condition.
Partial day request	Indicates it is a partial day request.

Copy Schedule Activities

The Copy Schedule Activities page allows you to copy activities from one agent's schedule on a particular day to other agents' schedules on selected days, or to the same agent's schedule on other

days. The copy function overwrites whatever is on those agents' schedule in those time slots with the source agent's activities.

Note: The copy function will not warn you if the resulting schedules violate min/max hour conditions.

Copying Schedule Activities

Use the Copy Schedule Activities page (Application Management > Schedules > Copy Schedule Activities) to copy activities from one agent's schedule to other agents' schedules.

The fields on the Copy Schedule Activities page are described below.

Field	Description
Agent	Select the agent whose schedule is the source of the activities you want to copy.
Date	Select the shift date of the source agent's schedule.
Schedule	Once you select an agent and date, the agent's schedule for that day appears. Select the check boxes next to the activities you want to copy.
Select Agents	Select the agents whose schedules you want to copy the activities to.
Select Dates	Select the shift dates you want the activities copied to. The dates must have a schedule generated for them.
Copy	Click Copy to copy the activities. This button is not enabled until you have completed all fields on the page.

People

The pages in this section of Application Management enable you to configure users, agents, team, and views to set up agent access to WFM.

The pages are:

Users

A user is someone who has a role within WFM. In systems that do not sync with an ACD, users are created, edited, and deleted from within WFM.

In systems that sync with an ACD, users are created and managed in the ACD, although you can still create users in WFM. When users are synced from the ACD, both a user record and an agent record are created and the user record is automatically linked to the corresponding agent record. You cannot change these settings.

Note: In synced systems, users created in WFM are not synced back to the ACD.

A user must have at least one role within WFM. The roles you can assign are agent, supervisor, and scheduler. There is no assignable administrator role, there is only the built-in system administrator. For more information on the administrator role, see About the Administrator Role.

Managing Users

Use the Users page (Application Management > People > Users) to create, edit, and delete users. You can edit and delete users one at a time or many at a time.

If you choose to manage multiple users, you can perform three different actions:

- Activate or deactivate them
- Assign roles to them
- Delete them

Note: In synced systems, if you want to delete a user record, you must delete it first in the ACD and then in WFM. The Sync service does not delete users from WFM when they are deleted in the ACD, so it must be done manually.

Best Practices: It is recommended that you do not delete users from WFM. If they are deleted, then you lose the link between the agent record and the user record.

The fields on the Users page are described below.

Field	Description
First Name	The user's first name.
Last Name	The user's last name.
Username	The WFM user name. In an Active Directory environment, this is the user's AD username and cannot be edited.

Field	Description
Password/Confirm Password	Create or reset the user's password here. In an Active Directory environment, these fields are not displayed because the user's Active Directory password is used. The password is administered in AD.
Activate this user	Select this check box to activate the user. The user cannot log in until the user account is activated.
Creation Date	(Read only) The date the user record was created.
Deactivation Date	(Read only) The date the user record was deactivated. As long as a record is activated, this field is not visible. When visible, it displays the date of the most recent deactivation.
Display Time Zone	Select the time zone the user's schedules are displayed in. By default this is the time zone configured on the *Global Settings* page.
Roles	Select one or more role for this user. In a synced system, the user is automatically assigned the agent role. **Note**: If a user is an active agent and is then assigned an additional role (for example, is promoted to supervisor), and that user is no longer required to work as an agent, you should deactivate the user's agent record and also unassign the user's agent role. Otherwise WFM might not function correctly.
Link this user to an agent/Select Agent	Select the check box and then select an agent from the Select Agent drop-down list. In synced systems, the check box is selected and read only, and the agent created at the same time as the user record is linked to the record.
Views	Select the views for the user. You must select at least one view, and one of the selected views must be designated as the Main View. The Main View designation affects the access the user has. If a view is designated as a user's Main View, then that user has read-write access to schedules in the Agent Schedules application. Also, if an agent's Main Team is part of a supervisor's Main View, then the supervisor has access to that agent's requests in the Messaging application.

Field	Description
Action	If you choose to manage multiple users, the Action section appears. Select the action you want to take from the Action drop-down field and then select the desired users in the selection pane.

Agents

In a synced system, agents are automatically created when the ACD is synced to WFM. You can also create non-ACD agents in a synced system.

Best Practices: Do not edit the First Name, Last Name, or ACD ID of a synced ACD agent in WFM. Those changes should always take place in the ACD. Also, any non-ACD agents you create should be assigned an ACD ID that is unique and that does not have the potential to be a duplicate of an ACD ID created by the ACD.

In a non-synced system, you can create, edit, and delete agents without restriction. However, the agents you create in WFM must have the same names and IDs as are set up for them in your ACD. This enables WFM to associate the historical data imported from the ACD into WFM with the correct agent.

Managing Agents

Use the Agents page (Application Management > People > Agents) to create, edit, and delete ACD and non-ACD agents.

Note: An agent must be inactive before he or she can be deleted.

Best Practices: It is recommended that you do not delete agents. If you delete an agent, all the historical data associated with the agent and all the agent's schedules are lost.

The fields on the Agents page are described below.

Field	Description
What Do You Want To Do?	Choose whether you want to edit an existing agent or create a new agent.
First Name	The agent's first name. In synced systems, this value comes from the ACD.
Last Name	The agent's last name. In synced systems, this value comes from the ACD.
Employee ID	The agent's ID within WFM. This value must be unique.

Field	Description
User Name	(Read only) The agent's WFM user name as configured on the Users record linked to this agent record. In an Active Directory system, this is the agent's AD username.
ACD ID	The agent's ID as assigned in the ACD. This number is used to connect synced agent records between the ACD and WFM, and WFM uses this number to identify the agent. In synced systems this value comes from the ACD and should not be changed. In a non-synced system, if the agent is an ACD agent, enter the agent's ID as assigned in the ACD. If the agent is not an ACD agent, enter a unique number in a range that will never conflict with any ID assigned to an ACD agent.
Company Start Date	Enter the date the agent started employment with the company. WFM uses this value to define scheduling priorities.
Company End Date	(Optional) Enter the date the agent will end employment with the company. The agent will not be scheduled after this date. Use this field when you know the agent's termination date.
Department Start Date	Enter the date the agent started working in the contact center. WFM uses this value to define scheduling priorities. The agent will not be scheduled before this date.
Rank	(Optional) Enter a whole number from 0 to 99999 to rank agents based on their seniority and expertise. WFM uses this value to define scheduling priorities. The exact meaning of rank depends on the service that your contact center provides. If you do not enter a rank, WFM treats it as 99999. **Note**: In version 9.2 and earlier, alphanumeric values were accepted in this field. Any existing rankings that are alphanumeric will be lost when WFM is upgraded to version 9.3 or newer.
Activate this agent	Select this check box to activate the agent in WFM. Agents must be activated in order to be scheduled.

Field	Description
Main Service Queue	Select the agent's primary service queue (optional). A service queue is a group of agents to which contacts are routed; it is generally associated with a particular skill. In WFM, min/max hour conditions can be set by service queue. Main service queues are also used in partial day swaps, to determine placing of breaks and lunches based on service queue requirements. For more information, refer to *Service Queues*.
Work Condition Profile	Select a work condition profile for the agent (optional). Use work condition profile to determine which work conditions can be applied to the agent's schedule. **Note**: An agent can only be assigned to one work condition profile.
Teams	Assign the agent to one or more teams, and designate one team as the agent's Main Team. The Main Team determines which statistics and messages the agents sees on the dashboard. By default the agent is assigned to the NewAgents team and that team is designated the agent's Main Team. **Note**: If an agent is assigned to more than one team, and then the agent is removed from the team that is designated as the Main Team, then you must designate one of the remaining teams as the agent's Main Team. If the agent is assigned to only one team after being removed from the team designated as the Main Team, the remaining team is automatically designated as the agent's Main Team.
Skill Mappings	Assign the agent to one or more skill mappings. The skill mappings you choose determine which service queues the agent can be scheduled for. Both the agent and the service queue must be assigned to the same skill mapping in order for the agent to be scheduled for that service queue. **Note**: Multiskill groups can be used instead of skill mappings to associate the agent with the service queues.

Field	Description
Standard Work Shift Rotation	Assign work shift rotations to the agent. When creating a work shift rotation, the first work shift moved to the Assigned pane is dated with the start date of the current week. Every subsequent work shift assigned is dated with the next week's date. There can be no gap in weeks from one work shift to the next. An agent's dynamic scheduling work shifts are ignored by WFM when doing work shift rotations. **Note**: If automatic work shift rotation is not enabled when running a schedule, there must be a work shift configured for the specific week of the schedule in order for this agent to be scheduled. Use the up and down arrows to reorder the work shifts in the rotation. The work shifts move up and down by half steps–one click up and the selected work shift is concurrent with the work shift above, becoming a split shift. Click again and the work shift moves to the week before the work shift above, and assumes that work shift's date; and all work shifts below redate themselves accordingly. The same goes for using the down arrow. See this example of work shift rotations for more information. **Note**: If the agent has an approved dynamic availability selection for a specified week, the dynamic availability selection is used for that week instead of these assigned/rotated work shifts. If the agent has completed dynamic scheduling and an approved dynamic availability selection for a specific week, the dynamic scheduling will be used for that week.
Copy Work Shift Rotations	You can copy this agent's work shift rotation to one or more selected agents. This will replace those agents' previous work shift rotations. You must first save this agent record before you can perform the copy.
Other Work Shifts	This section displays the other types of work shifts (dynamic scheduling work rules and dynamic availability), that are assigned to the agent and that contribute to the creation of the agent's schedule. Click the status to view details about the assigned work shift.

Field	Description
Assigned Exceptions	This table displays all exceptions assigned to the agent. By default the table is sorted by date in descending order, so the most current date is at the top. The table can be sorted on any column. You can delete exceptions from the table by selecting the check box next to the exception and clicking Delete. The Delete button is not enabled until at least one exception is selected. **Note**: Deleting an assigned exception here will not delete that exception from an agent's schedule that has already been generated.
Vacation Hours	This table displays the agent's current vacation hours status for the current vacation plan and date range. The Type is the vacation type assigned to the vacation plan. The Hours Earned comes from the vacation plan assigned to the agent, or, if *HRMS Integration* is enabled, from the HRMS. The Hours Used and Hours Approved But Not Yet Taken are calculated from the exceptions mapped to the vacation types that have been used and approved for the agent. The Hours Remaining is calculated by subtracting the Hours Used and Hours Approved But Not Yet Taken from the Hours Earned.
Schedule Release Profile	(Optional) Select the schedule release profile that applies to this agent. If left blank, schedules are displayed to new agents according to Number of Weeks Visible in Global Settings (unless a schedule release profile is specified in Global Settings). See *Schedule Release Profiles* for more information.

Example: Work Shift Rotation

The following table shows what happens when you move work shifts up and down in the Work Shifts section's Assigned pane on the Agents page.

Action	Effect on Shift Rotation	Comment
Select Shift 3	Week A | Shift 1 Week B | Shift 2 **Week C | Shift 3** Week D | Shift 4	

Action	Effect on Shift Rotation	Comment
Click Up	Week A | Shift 1 Week B | Shift 2 **Week B | Shift 3** Week C | Shift 4	Shifts 2 and 3 are now split shifts for Week B
Click Up	Week A | Shift 1 **Week B | Shift 3** Week C | Shift 2 Week D | Shift 4	Week B no longer has a split shift
Click Up	**Week A | Shift 3** Week A | Shift 1 Week B | Shift 2 Week C | Shift 4	Shifts 3 and 1 are now split shifts for Week A
Click Up	**Week A | Shift 3** Week B | Shift 1 Week C | Shift 2 Week D | Shift 4	Shift 3 is now first in the rotation and all other shifts have moved down one week

Note: A split work shift is a situation in which an agent works two different shifts during the same day. Before you split a work shift, you must create two work shifts that start and end at different times or days, and that do not overlap.

Example: If an agent works four hours in the morning and four hours in the evening, you must create one work shift that covers the morning hours and another work shift that covers the evening hours.

Teams

In a synced Cisco system, some teams are created in the ACD and synced to WFM. If a team has agents assigned to it in the ACD, then in WFM those agents have the team listed as their Main Team. For these teams, you should not change the team name, the agents assigned to the team, or the team's status as those agents' Main Team.

However, you can create and manage teams in WFM. These teams are not synced back to the ACD.

In a non-synced system, you can create and manage teams as desired.

Managing Teams

Use the Teams page (Application Management > People > Teams) to create, edit, and delete teams.

> **Best Practices:** It is recommended that you do not delete teams. If you delete a team, all the historical data associated with the team is lost.

The fields on the Teams page are described below.

Field	Description
Team Name	Enter a unique name for the team. Synced team names are read only.
Agents	Assign the desired agents to the team, and for each agent, if this is that agent's Main Team, select the Main Team check box. If this is the Main Team for all selected agents, you can select the check box next to the column header to select every check box in the list. In a synced system, you cannot change the list of agents assigned to the synced team.
Include this team in productivity reports	Select this check box if you want this team's statistics to be included when the Capture service compiles all daily, weekly, monthly, and yearly productivity statistics.

Views

A view controls the scope of access a user has in WFM. A user assigned to a view has access only to the entities (teams, service queues, service queue groups, multiskill groups, skill mappings, work conditions, work shifts, exceptions, and projects) assigned to that view according to the privileges of their role.

A WFM entity can be included in multiple views, and a user can be assigned to multiple views.

The WFM system view is called EnterpriseView. This view cannot be renamed or deleted. You can use this as your primary view or create new views to suit your needs.

Managing Views

Use the Views page (Application Management > People > Views) to create, edit, and delete views.

The fields on the Views page are described below.

Field	Description
View Name	Enter a unique name for the view. **Note**: EnterpriseView is a system view and cannot be renamed or deleted.
Activate this view	Select this check box to activate the view. A view cannot be used unless it is activated.
Users	Select the users to assign to the view.
Teams	Select the teams to assign to the view.
Multiskill Groups	Select the multiskill groups to assign to the view.
Service Queues	Select the service queues to assign to the view.
Service Queue Groups	Select the service queue groups to assign to the view.
Skill Mappings	Select the skill mappings to assign to the view.
Work Conditions	Select the work conditions to assign to the view.
Work Shifts	Select the work shifts to assign to the view.
Exceptions	Select the exceptions to assign to the view.
Projects	Select the projects to assign to the view.
Dynamic Work Rules	Select the dynamic work rules to assign to the view.
Dynamic Scheduling Events	Select the dynamic scheduling events to assign to the view.

Note: Administrators and schedulers specified as Workflow Administrators (System Configuration > Global Settings) are automatically given Enterprise View permissions while they are working with workflows, exception types, or vacation types.

Schedule Editing Rules

An administrator might want to limit a supervisor's ability to edit agent schedules for various reasons. For example, a supervisor might be in training and not yet experienced enough to have full access to schedule editing. The Schedule Editing Rules page allows you to assign a schedule editing rule to specific supervisors that manages their editing capabilities.

You can configure a rule to prevent supervisors from the following actions:

- Inserting all or certain kinds of activities
- Trading schedules
- Changing schedules using the Find Optimal Time feature
- Moving various types of activities (for example, lunches or breaks) by more than a specified number of minutes

If you just assign a schedule editing rule to a supervisor, then that supervisor is prevented from doing whatever task you have set limits on, or moving activities by more than a specified amount of time. However, you can create a workflow that will allow a supervisor to perform a task but will defer the resulting schedule changes from taking place until they have been manually approved. This is done by use of a workflow.

Setting up a workflow is optional. You do not need a workflow for a change that meets the rule requirements to take effect (for example, a supervisor who is limited to moving a break no more than 30 minutes is allowed to move a break 15 minutes), However, setting up a workflow enables WFM to check coverage and staffing. If that is important in your contact center, it is recommended that you do set up workflows along with schedule editing rules.

Creating a Workflow

You can set up a schedule edit workflow that can approve, deny, or force manual handling for schedule changes. Use the following options:

- Choose a Schedule Edit event

  Note: A supervisor trade event is not available at this time. You can create a workflow for supervisor schedule edits only.

- Choose the Manual Handling, Approve, or Deny action
- Assign the appropriate supervisors in the Assign Users section

See *Workflows* for information on how to configure a workflow.

The workflow runs when the supervisor clicks **Save** after making edits on the Agent Schedules page. If the action chosen for the workflow is Manual Handling, the changes will not go into effect until they are manually approved by an administrator or scheduler on the *Schedule Edit Management* page.

Managing Schedule Editing Rules

Use the Schedule Editing Rules page (Application Management > People > Schedule Editing Rules) to create, edit, and delete schedule editing rules.

To create a new schedule editing rule:

1. Choose the “Create new schedule editing rule” option.
2. Enter a unique name for the rule.
3. Select the activities you want to prevent supervisors from performing in the “Prevent user from doing” pane. You can prevent supervisors from inserting all or some types of new activities, trading schedules, and finding optimal times.
4. Select the existing activities you want to prevent or limit supervisors from moving in the schedule more than a specified number of minutes in five-minute increments. For example, select “Breaks by more than” and enter **15** in the minutes field to limit a supervisor from moving a break more than 15 minutes earlier or later in the schedule. To prevent the supervisor from moving breaks at all, enter **0** in the minutes field. Any value you enter, if not in a five-minute increment, will snap to the nearest five minutes.
5. Assign supervisors to the rule by selecting them in the Available pane and moving them to the Assigned pane. Only supervisors are listed in the Available pane.
6. Click **Save**.

To edit or delete an existing schedule editing rule:

1. Choose the “Edit or delete existing schedule editing rule” option.
2. Select the desired rule from the Schedule Editing Rule drop-down list and do one of the following.
   a. Edit the rule as desired, and click **Save**.
   b. To delete the rule, click **Delete**, and **Yes** to confirm the deletion.

Services

The pages in this section of Application Management enable you to configure the service queues in your contact center.

The pages are:

Service Queue Types

The service queue type describes the kind of contact a service queue handles. It allows you to group like service queues together into service queue groups and virtual service queues, and to generate forecasts for like service queues.

There are two types of contacts:

- **Interactive contacts** are agent/customer interactions that occur in real time, such as calls and chats.
- **Non-interactive contacts** are agent/customer interactions that do not occur in real time, such as email, tweets, social media, and faxes.

Each service queue type has a unique name. For example you can create a service queue type called Twitter with a contact type of Non-interactive, and another called Chat with a contact type of Interactive.

WFM comes with two system service queue types: Voice/Interactive and Email/Non-interactive. If you are upgrading from a previous version of WFM that allowed you to configure service queues for calls or email, then those service queues are automatically assigned the Voice or Email service queue type.

There are limitations on what you can do with a service queue type once it has been created.

- You cannot change its contact type. For example, if you create the ABC service queue type with a contact type of Interactive, you cannot change it to Non-interactive later on.
- If a service queue type is assigned to a service queue, you cannot delete it.
- You cannot edit or delete the system service queue types, Voice and Email.

You can, however, change the name of a service queue type you created even after it has been assigned to a service queue. The new name will be reflected throughout the system.

Managing Service Queue Types

Service queue types are configured and maintained on the Service Queue Types page (Application Management > Services > Service Queue Types).

To create a new queue type:

1. Choose Create a new service queue type.
2. Enter a unique name for the service queue type that describes the kind of contact a service queue handles, with a maximum of 50 characters.
3. Choose the contact type, interactive or non-interactive.
4. Click Save.

To edit an existing service queue type:

1. Choose Edit or delete an existing service queue type.
2. Select the desired service queue type from the drop-down list.
3. Edit the service queue type's name as desired. You cannot change the contact type.
4. Click Save.

To delete an existing service queue type:

1. Choose Edit or delete an existing service queue type.
2. Select the desired service queue type from the drop-down list.
3. Click Delete.

Note: You cannot delete a service queue type that is assigned to a service queue, or either of the system service queue types (Voice and Email).

Service Queues

A service queue is a group of agents to which contacts are routed. It is generally associated with a specific skill.

In WFM, you schedule agents to support service queue requirements. For this reason, WFM makes service queues the focal point for schedules and forecasts.

Environments with Synchronized ACDs: WFM imports service queue data from these ACDs via the Sync service. Imported service queue data that cannot be changed in WFM (the service queue ID) is read-only on the Service Queues page. That data can only be changed in the ACD. Service queues you create in WFM exist only in WFM and are not added to the ACD. For more information, see Synchronizing Service Queue Data.

Environments with Non-synchronized ACDs: The service queues you create in WFM must have the same names and IDs as are set up for them in your ACD. This enables WFM to associate the historical data imported from the ACD into WFM with the correct service queue.

Managing Service Queues

Use the Service Queues page (Application Management > Services > Service Queues) to create, edit, and delete service queues.

You cannot delete a service queue if schedule data for that service queue exists.

Best Practices: It is recommended that you do not delete service queues. If you delete a service queue, all the historical data associated with it is lost.

The fields on the Service Queues page are described below.

Field	Description
Service Queue ID	The unique ID that identifies the service queue. In synced systems, the ID is created in the ACD. Once an ID is assigned to a service queue, it cannot be changed.

Field	Description
Service Queue Name	The service queue's name. In synced systems, the name is created and maintained in the ACD.
Do not generate forecasts or schedules for this service queue	Select this check box to deactivate the service queue. It will no longer be available when generating distributions, forecasts, and schedules. However, you will still be able to view its historical data. **Note**: If you select this check box, be sure to remove the service queue from all multiskill groups it is associated with. If you do not, a schedule request for those multiskill group will fail.
Service Queue Type	Select the service queue type that describes the kind of contacts this service queue handles. See *Service Queue Types* for more information.
Redistribution Type	(Non-interactive service queues only) Select the redistribution type that determines how non-interactive contacts that arrive during the service queue's closed hours are redistributed among target intervals for forecasting purposes. Target intervals are determined by the handling threshold. Your options are the following: • None: Contacts that arrive during closed hours are ignored and not redistributed (default). • Proportional: Contacts are redistributed proportionally among target intervals based on the target intervals' distribution ratios. • Even: Contacts are redistributed evenly among the target intervals.

Field	Description
Service Queue Priority	Enter the service queue priority, any number from 0 to 999, with 0 being the highest priority. The service queue priority allows WFM to resolve scheduling conflicts when agents are assigned to multiple service queues. **Example**: You designate some of your agents to support two service queues. If WFM generates the schedules for the two service queues and discovers that there are not enough agents to support all forecast requirements for both, it compares the priority value of each service queue and schedules agents for the service queue with the highest priority first.
Average Talk Time	Enter the average amount of time, in seconds, that a contact lasts for this service queue. WFM uses this information to determine the number of agents needed to meet requirements when it generates a distribution for this service queue. You can opt to let WFM calculate this value for you automatically when it generates a distribution by selecting the check box in the Service Queue Standard Times section of the Distribution Request page.
Average After Contact Work Time	Enter the average amount of time, in seconds, that an agent spends in after contact work for this service queue. WFM uses this information to determine the number of agents needed to meet requirements when it generates a distribution for this service queue. You can opt to let WFM calculate this value for you automatically when it generates a distribution by selecting the check box in the Service Queue Standard Times section of the Distribution Request page.
Handling Threshold	(Non-interactive service queues with a proportional or even redistribution type only) Enter the amount of time in which contacts must be handled, in minutes. Valid values are from 0 to 4,320 minutes (72 hours).

Field	Description
Service Level Objective	(Interactive service queues only) Enter the percentage of contacts to be answered within a specified number of seconds. The number of seconds must be greater than zero. WFM uses this goal to determine the number of agents needed to meet requirements when it generates a distribution and forecast for the service queue.
Forecast Precision Level Percentage	This read-only value is calculated when you run a forecast accuracy computation request for the service queue. If you have not done this, then the value displayed is 0%. The forecast precision level is a measure of how accurate a forecast was by comparing forecasted contact volume with actual contact volume. For example, if the forecast precision level is 105%, the forecasted contact volume was 5% greater than the actual contact volume.
Opening and Closing Hours	Enter the days and hours of operation of the service queue. A check indicates that the service queue is active, or open, on a particular day. The hours of operation are in 24-hour format, and must be in multiples of five minutes. If anything else is entered, the value is rounded to the nearest five minutes. The exception is the value 23:59, meaning midnight.
Multiskill Groups	This section displays the name of each multiskill group that this service queue is a part of. Assign a priority (from 0 to 999, with 0 being the highest) to each multiskill group. The priority you assign here helps to determine how agents are scheduled to support the service queues that make up the multiskill groups.
Skill Mappings	Assign one or more skill mappings to the service queue and set their priorities (0-999, with 0 being the highest). Skill mappings link agents to service queues. In order for agents to be scheduled to support this service queue, both the agents and the service queue must be assigned to the same skill mapping. Assigning a priority to each skill mapping allows WFM to resolve scheduling conflicts when agents with multiple skills belong to multiple service queues.

Field	Description
Virtual Service Queue	Select the check box if this service queue is a virtual service queue. Once you do this, a service queue selection pane opens so you can assign service queues to be members of the virtual service queue. The available service queues all have the same service queue type. **Note**: Do not make a synced service queue a virtual service queue. Select this check box only if you created the service queue in WFM.
Scheduling Order	Use the table to configure the order in which agents are scheduled for the service queue. WFM compares the agents based on this order and schedules the highest priority agents first. If you want to reset the order to the system default, click the Restore Default button. The criteria used are the following: • Maximum hours available: The sum of the maximum number of hours an agent can be scheduled each day of the week • Minimum hours available: The sum of the minimum number of hours an agent can be scheduled each day of the week • Maximum hours per week: The maximum number of hours per week configured for the agent's work shift (from the Work Shifts page) • Minimum hours per week: The minimum number of hours per week configured for the agent's work shift (from the Work Shifts page) • Rank: The agent's ranking in the contact center based on expertise (from the Agents page) • Company start date: The date the agent started working for the company (from the Agents page) • Department start date: The date the agent started working for the department (from the Agents page)

Field	Description
Color	Select the color you want to represent this service queue in the schedule. This color is used only for in-service scheduled activities; closed service queue and overtime scheduled activities for the service queue use standard, non-editable colors.

To improve a service queue's coverage, you can automate the process of changing agents' breaks and lunches using work condition profiles. For more information, refer to *Work Condition Profiles*.

Virtual Service Queues

A virtual service queue is a collection of service queues with the same service queue type. Virtual service queues exist only in WFM.

Once you create a virtual service queue, WFM starts collecting historical data for it. If historical data already exists for each service queue in the virtual service queue, you can merge the historical data from the source service queues into the virtual service queue using a Historical Data Merge Request.

Create a virtual service queue when you want to generate a single forecast, distribution, or schedule for a group of like service queues. The following are examples of some situations where a virtual service queue is useful.

Example: A contact center has one service queue for premium customers and another for regular customers. Premium customers reach an agent faster and receive higher value services. The agents who handle customer calls are members of both service queues. Creating a virtual service queue that is comprised of the premium and regular customer service queues simplifies scheduling.

Example: An organization has IT help desks in multiple locations. The contact center uses a service queue for each location to account for multiple time zones, and to allow reporting by location. The contact center routing consolidates the agents from each location into a single pool, and distributes calls to the next available agent regardless of location. By grouping the service queues into a virtual service queue, WFM can schedule the agents as a single group in a pattern that is consistent with the routing and time zones.

Service Queue Groups

The Service Queue Groups page (Application Management > Services > Service Queue Groups) allows you to create and manage service queue groups.

A service queue group is a collection of individual service queues of the same service queue type. 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.

Managing Service Queue Groups

Use the Service Queue Groups page (Application Management > Services > Service Queue Groups) to create, edit, and delete service queue groups.

The fields on the Service Queue Groups page are described below.

Field	Description
Service Queue Group Name	Enter the name of the service queue group.
Select Service Queue Type	Select the service queue type for the service queue group.
Service Queues	Select the desired service queues from the list of the available service queues of the service queue type you selected.
Color	Select the color you want to assign to the service queue group.

Multiskill Groups

A multiskill group is used to schedule agents to support multiple service queues during the same period of time. A multiskill group is made up of a number of service queues. Each service queue is weighted by percentage to indicate how much of an agent's time is spent supporting that service queue within the multiskill group.

Scheduling agents for multiskill groups is reflected in calculations such as Agents Scheduled and Service Level Scheduled. Because the agents split their time among multiple service queues, their contribution to each service queue by percentage is reflected in these calculations.

Managing Multiskill Groups

Use the Multiskill Groups page (Application Management > Services > Multiskill Groups) to create, edit, and delete multiskill groups.

> **Best Practices:** It is recommended that you do not delete multiskill groups. If you delete a multiskill group, all the agent schedules associated with it are also deleted.

The fields on the Multiskill Groups page are described below.

Field	Description
Multiskill Group Name	The multiskill group's name.
Service Queues	Assign one or more service queues to the multiskill group, and then assign a weight (percentage) to each service queue. The weight is the percentage of time an agent assigned to this multiskill group spends supporting that service queue. The weights must add up to 100%. **Note**: If a service queue is deleted or has the "Do not generate forecasts or schedules for this service queue" check box selected, its weighting is not automatically redistributed to the other service queues in the multiskill group.
Agents	Assign one or more agents to the multiskill group. An agent can belong to only one multiskill group. **Note**: You are not warned if an agent belongs to another multiskill group.
Color	Select the color you want to represent this multiskill group in the schedule.

Skill Mappings

Skill mappings provide links between service queues and agents. The agents assigned to a skill mapping generally have the same skills.

To schedule an agent to support a service queue, you must assign the agent to the skill mapping or multiskill group associated with the service queue. You can assign an agent to more than one skill mapping. Agents not assigned to a skill mapping or multiskill group cannot be scheduled.

Note: When WFM imports service queue information from synced ACDs, it automatically creates a skill mapping for each service queue on a one-to-one basis. The skill mapping has the same name as the service queue, and the service queue is automatically assigned to it. The sync happens only once. If you delete the skill mapping it will not be recreated the next time synchronization occurs.

The service queues assigned to the skill mapping are prioritized. This enables WFM to resolve scheduling conflicts when agents are assigned to multiple service queues—the agent will be scheduled for the highest priority service queue first.

Example: You designate some of your agents to support two service queues and assign a priority to each service queue. When WFM generates the schedules for the two service queues and discovers there are not enough agents to support all forecast requirements for each service queue, it compares the priority value assigned to the service queues. WFM then schedules agents for the service queue with the highest priority first. If a service queue has more than one skill mapping or multiskill group, agents associated with the higher skill mapping or multiskill group priority will be scheduled before agents associated with the lower skill mapping or multiskill group priority.

Managing Skill Mappings

Use the Skill Mappings page (Application Management > Services > Skill Mappings) to create, edit, and delete skill mappings.

Note: In environments that sync with the ACD, any new skill mappings you create in WFM will not be added back into the ACD.

Best Practices: It is recommended that you do not delete skill mappings. If you delete a skill mapping, all the historical data associated with it is lost.

The fields on the Skill Mappings page are described below.

Field	Description
Skill Mapping Name	Enter a unique name for the skill mapping.
Service Queues	Assign service queues to the skill mapping.
Priority	Assign a priority to each selected service queue, from 0 to 999, with 0 being the highest priority. This priority enables WFM to resolve scheduling conflicts when agents are assigned to multiple service queues.
Agents	Assign agents to the skill mapping. The assigned agents will then be able to be scheduled for the assigned service queues.

Service Queue Closed Days

Use the Service Queue Closed Days page to designate dates on which a service queue is closed and therefore not able to handle customer contacts. Typical closed days are national holidays.

Closed days should not be used for the days when the service queue is routinely closed. For example, a service queue might be open Monday through Friday and closed on Saturday and Sunday. This is more appropriately configured on the *Service Queues* page in the Opening and Closing Hours section.

In WFM, all service queues are assumed to be open every day of the year unless configured otherwise.

If closed days are the same from year to year for a service queue, or the same for multiple service queues, you can configure them for one service queue and then copy them to other years and other service queues.

Note: Designating a day as closed changes the forecast for that day to zero contacts. However, it does not affect any schedule that is already generated for that day. If agents are scheduled to work on a day that is designated as closed, they remain scheduled for that day. A solution for this situation is to create an exception and assign it to the service queue for that day. If a date is designated as closed after the forecast has been generated, the Schedule service still treats the forecast for that date as zero even if the forecast shows positive values.

Note: If agents are scheduled on a closed date, they will still have breaks and lunches scheduled if the configuration requires those work condition activities. For example, if agents have a fixed work shift assigned on the closed date where there is a matching work condition assigned to the work shift that has breaks and lunch, the agents will have breaks and lunch scheduled.

Best Practices: It is recommended that you update a service queue's closed days at least once a year.

Managing Service Queue Closed Days

Use the Service Queue Closed Days page (Application Management > Services > Service Queue Closed Days) to create, edit, and delete closed days.

The fields on the Service Queue Closed Days page are described below.

Field	Description
Service Queue	Select the service queue whose closed days you want to configure.
Year	Select the year that contains the closed days.
Select Closed Days	Select the closed days from the calendar.
Copy To	Once you have configured closed days and saved the record, you can copy those closed days to another year for the same service queue or to any year for another service queue. Select the desired year and/or service queue and then click Copy.

Firm Date Associations

A firm date association is a link between two dates that fall on different days of the week from year to year. Firm date associations are useful because when WFM generates a forecast, it uses historical data from the same day of the week.

To ensure that WFM uses a date with similar data for its forecast, you must create firm date associations.

> **Example:** To generate a forecast for Wednesday, January 1, 2014, WFM uses data from Wednesday, January 2, 2013. However, the 2014 date is New Year's Day and the 2013 date is the day after New Year's Day. The contact data for the two dates is probably going to be significantly different because of the holiday. Creating a firm date association between January 1, 2014 and January 1, 2013 corrects this when generating a forecast.

If you do not have adequate historical data in the WFM database to use firm date associations, you can generate a forecast and then edit the data for that specific date to reflect correct information.

Managing Firm Date Associations

Use the Firm Date Associations page (Application Management > Services > Firm Date Associations) to create, edit, and delete associated dates for individual service queues.

Once you set up firm date associations for one service queue, you can copy them to another service queue.

You cannot edit associated dates once you have set them up, but you can edit their descriptions. If you have made an error in selecting the two dates, delete the date association and start again.

The fields on the Firm Date Associations page are described below.

Field	Description
Service Queue	Select the service queue you want to create firm date associations for.
Associate this future target date	Select the date in the future you want to link to a past reference date. This is the date you will be creating forecasts for.
With this historical reference date	Select the date in the past that has historical data similar to what you expect on the future date.
Description	Enter a description of the associated dates to identify them, such as "New Year's Day" or "Annual Sales Event." This is the only field you can edit once you save a firm date association.
Add button	Click the Add button to add the associated dates to the table.
Delete button	If you want to delete a date association, select the check box next to it in the table and click Delete.

Field	Description
Copy to Service Queue	Once you have saved firm dates for a service queue, you can copy them to another service queue. Select the target service queue in this field and then click Copy. **Note**: The Copy action overwrites any firm date associations that might have been set up for the target service queue.

Special Events

A special event is a type of event that causes contact volume to deviate from normal. The special event can cause volume to either increase or decrease. When you assign a special event to a service queue, WFM makes adjustments for the effect of the special event when generating distributions and forecasts.

When examining a historical special event, consider the following:

- Which service queue does the special event affect? A special event is always related to a service queue.
- What type of event is this special event? You can configure generic types of special events with default values. Once you create a generic special event, you can select it from a list of available special event types whenever you need it.
- When does the special event occur?
- How many days after the special event does the contact volume impact appear? The impact of a power outage is immediate. The impact of a bill format change happens after the postal service delivers the bills and the customers open the mail.
- How long does the contact volume impact last in days? The impact of a power outage might only last a day, if service is restored during that time. The impact of a bill format change is likely to endure for a number of days, because customers handle bills at different times.
- What was the impact ratio? This is determined by dividing the contact volume that occurred with the special event by the contact volume that would most likely occur in the absence of the special event.

Impact on Distribution Requests

If the reference period you specify in a distribution request includes a special event, the special event date is excluded from the reference period. This ensures that the abnormal contact patterns

(including contact handle times) on the special event day do not affect the contact distribution patterns.

Example: Consider a power outage that causes the daily contact volume to be halved—it is normal in the morning but goes to zero in the afternoon. A special event with an impact ratio of 0.5 is created. The date of this special event, if part of a reference period, will be excluded from that reference period.

Impact on Forecast Requests

If the reference period you specify in a forecast request includes a special event, the normalized contact volume is calculated by dividing the actual contact volume on the special event day by the impact factor. That is:

> Normalized contact volume = Actual contact volume on special event date ÷ Impact factor

In the power outage example, let us say that the actual contact volume on the day the power outage occurred was 5,000 contacts. The power outage special event has an impact factor of 0.5. Using the above equation:

> Normalized contact volume = 5,000 ÷ 0.5 = 10,000

The contact volume in the reference period has been normalized to 10,000 contacts to compensate for the effect of the special event, which makes the forecast more accurate.

Limitations of Special Events

Special events are used to negate the effects of a sudden and nonrepeating change in the contact volume in the past to ensure that forecasts do not include these anomalies.

Special events cannot be used to predict changes in contact volume due to future events, such as an upcoming marketing campaign. These types of events can be accommodated either automatically or manually during the forecasting process.

Managing Special Events

Use the Special Events page (Application Management > Schedules > Special Events) to create and manage special events and assign them to service queues.

Best Practices: It is recommended that you do not delete a special event. If a special event is deleted, the historical data associated with it will be lost, which can affect forecast accuracy.

The fields on the page when you create, edit, or delete a special event are described below.

Field	Description
Special Event Name	Enter a name for the special event.

Field	Description
Impact Delay	Enter the delay in whole days between the special event's occurrence and when it actually affects the contact center. Default value = 0.
Impact Duration	Enter the number of whole days you expect the effects of the special event to last. Default value = 1.
Impact Ratio	Enter the impact of the special event on normal contact volume. Default value = 1.

The fields on the page when you assign a special event to a service queue are described below.

Field	Description
Service Queue	Select the service queue you want to assign the special event to.
Special Event	Select the special event you want to assign to the service queue.
Event Date	Select the date of the special event.
Impact Delay	This field is autofilled with the value configured for the special event. You can change it if desired.
Impact Duration	This field is autofilled with the value configured for the special event. You can change it if desired.
Impact Ratio	This field is autofilled with the value configured for the special event. You can change it if desired.
Comment	Enter a comment about the special event if desired.
Assign button	Click this button to assign the event to the service queue. It is added to the Assigned Events table.
Delete button	Click this button to delete the selected special event from the Assigned Events table.

Historical Data

The pages in this section of Application Management enable you to capture, merge, and edit historical data.

The pages are:

View and Edit Historical Data

WFM requires historical data to generate distributions, forecasts, and schedules and to calculate statistics. The more accurate the historical data is, the more accurate forecasts and schedules will be. However, sometimes historical data for a service queue is incomplete, inaccurate, or missing entirely. When this happens, you can enter the missing data manually or edit existing inaccurate data using the View and Edit Historical Data page.

Reasons you might want to edit or enter historical data include the following:

- To correct data that is inaccurate due to system or network issues
- To adjust data that is unusual due to an infrequent event, such as a marketing campaign
- To input missing data when contact volume is normal but no data was captured because the system or network was down
- To create data when historical data is either unavailable or missing, such as when you first install WFM
- To support forecasting and scheduling for non-interactive service queues (such as those that handle email and social media)

Note: The Generic Interface Services (GIS) API can also be used to add historical data from any ACD to the WFM database. The GIS API is part of WFM and requires no separate installation or executable to function. See the *Data Import Reference Guide* for more information.

Viewing and Editing Your Historical Data

Use the View and Edit Historical Data page (Application Management > Historical Data > View and Edit Historical Data) to display the historical data for a specific service queue and date.

Once you have completed the historical data parameters a table is displayed with the requested data, if any exists. If none exists for a service queue, you can enter data for that service queue and a specific day at the Interval zoom level.

You can copy and paste data in the table using standard Windows shortcut keys.

- Click and drag with your mouse to select specific rows and columns in the table, or Ctrl + A to select the entire table.
- Use Ctrl + C to copy the selected cells to the clipboard in TSV (tab separated value) format. This action copies both editable and read-only columns.

- Use Ctrl + V to paste the contents of the clipboard into table cells. The data you are pasting can be in TSV or CSV format. You can paste into a specifically chosen group of cells, or just select the cell that becomes the upper left corner of your pasted data. The data is pasted into the selected cells, unless the selected column is read-only. You cannot paste copied data into read-only columns. If the copied data is too big to fit into the selected paste area, paste expands the selection to the size of the data on the clipboard. For example, if you select a 2 × 2 area but the data on the clipboard is 3 × 3, then it will paste 3 × 3. The pasted data is highlighted in the table.

The fields on the View and Edit Historical Data page are described below.

Field	Description
Service Queue	Select the service queue whose data you want to view and/or edit.
Zoom Level	Select the level of detail you want to use to view the data. Your choices are: ■ I (by interval) ■ D (by day) ■ W (by week) ■ M (by month) ■ Y (by year) Data can be edited only at the Interval zoom level.
Date	Appears only when the Interval zoom level is selected. Enter the date whose data you want to view or edit.
Start Date/End Date	Appears only when the Day, Week, Month, or Year zoom level is selected. Enter the start and end date of the period whose data you want to view.

The fields in the historical data table are described below. The table shows the definition of the field for both interactive service queues and non-interactive service queues.

For more information on interactive and non-interactive service queues, see *Service Queue Types*.

Field	Description
Contacts Offered	The number of ACD calls/contacts routed to the service queue during the interval.

Field	Description
Contacts Handled	The number of ACD calls/contacts the agents completed during the interval.
Contacts Abandoned	The number of ACD calls routed to the service queue during the interval that were abandoned (the caller hung up while in queue or while ringing at the agent's phone). Calls are counted for the interval when the caller hangs up.
Contacts Answered	The number of ACD calls/contacts answered in the service queue during the interval. Calls are counted in the interval in which the agent answered them.
Total Answer Time	The amount of time that all calls/contacts were in the queue and answered in the interval.
Average Talk Time	Interactive service queues: The average amount of time spent talking and on hold for all calls handled in the interval. Non-interactive service queues: The average amount of time spent working on each contact for all contacts handled in the interval.
Average Work Time	Average amount of after contact work for each contact for all contacts handled in the interval.
Service Level Percentage	The percentage of contacts that met the service level objective for the interval.
Maximum Contacts in Queue	The maximum number of contacts in queue for the interval. Present only for non-interactive service queues.

Capture Historical Data

Capturing historical data from your ACD might become necessary in certain circumstances. These include:

- You want to import historical data from your ACD for the period before you installed WFM.
- You want to fill in gaps in your historical data that occurred because of interruptions in the connection to your ACD after you installed WFM.

Capturing Historical Data

Use the Capture Historical Data page (Application Management > Historical Data > Capture Historical Data) to run a request to capture historical data from your ACD and import it to WFM.

Best Practices: Capturing data from the ACD can put a large load on the system. We recommend that if you are requesting a large amount of data, you run this request when the contact center is closed or during a quiet period.

The fields on the Capture Historical Data page are described below.

Field	Description
Start Date	Select the start date of the data you want to capture. The default value is the current date.
Start Time	Select the start time of the data you want to capture. The default value is the beginning of the current half-hour interval you are in.
End Date	Select the end date of the data you want to capture. The default value is the current date.
End Time	Select the end time of the data you want to capture. The default value is the end of the current half-hour interval you are in.

Historical Data Merge Request

Virtual service queues are composed of multiple service queues. Often those service queues were in existence before the virtual service queue was created, and as a result there is historical data associated with each of them for that prior period. To build historical data for the virtual service queue, the historical data of each of its component service queues must be merged into the virtual service queue. The Historical Data Merge Request page (Application Management > Historical Data > Historical Data Merge Request) enables you to do this.

The historical data for the individual service queues is preserved, so if you delete a service queue from the virtual service queue, it is still available for use.

To run a historical data merge request:

1. Enter a start date and end date for the period of historical data you want to merge.
2. Select the virtual service queue.
3. Enter a run date and time to schedule the request. If you do not specify a later date and time, the request runs immediately.
4. Click Submit.

Forecast Accuracy Compilation Request

Forecast accuracy is the ratio of the forecasted contact volume to the actual contact volume. The Forecast Accuracy Compilation request (Application Management > Historical Data > Forecast Accuracy Compilation Request) calculates this ratio for one or more service queues based on historical

data. It cannot tell you how accurate a forecast will be in the future, it can only evaluate the accuracy of forecasts in the past.

> **Example:** If the forecast precision level percentage for a service queue is 105%, it means that the forecasted contact volume was 5% greater than the actual contact volume.

The value calculated by this request is displayed on the Service Queues page in the Forecast Precision Level Percentage section.

To run a forecast accuracy compilation request:

1. Enter a start date and end date for the period whose forecast accuracy you want to calculate.
2. Select one or more service queues. Each service queue must have forecasts generated for them for the selected date range.
3. Enter a run date and time to schedule the request. If you do not specify a later date and time, the request runs immediately.
4. Click Submit.

Strategic Planning

The pages in this section of Application Management enable you to estimate future contact center requirements and costs.

The pages are:

Strategic Resources

Strategic resources are the people and capital equipment that make up your contact center. The strategic resources you configure here are used to generate strategic planning reports that estimate future costs and requirements.

The base resource is the agent. All other resources are calculated directly or indirectly in terms of the number of agents in the contact center.

> **Example:** You configure one administrator for every 50 supervisors, and configure one supervisor for every 20 agents. A supervisor has a direct relationship to the number of agents,

and an administrator has an indirect relationship to the number of agents through the number of supervisors.

Managing Strategic Resources

Use the Strategic Resources page (Application Management > Strategic Planning > Strategic Resources) to create, edit, and delete strategic resources.

Note: The Agent resource is a system resource. You can edit the details of the Agent resource, but you cannot delete it.

The fields on the Strategic Resources page are described below.

Field	Description
Resource Name	Enter a unique name for this resource.
Resource Category	Choose the type of resource this is: a human resource (employees and contractors) or a capital item (equipment, furniture, and fixtures).
Resource Cost	Enter the resource cost per month or per year, or as a one-time expenditure. If you choose one-time expenditure, enter the resource's lifespan in months.
Resource Ratio	Complete the statement to describe the ratio of this strategic resource to another resource. Directly or indirectly, every resource is defined in relation to the Agent resource. **Note**: This field is not present for the Agent system resource, since the agent is the base resource.
Current Number of Resources	Enter the number of this strategic resource you currently have in the contact center. If the resource is a human resource, use the number of FTE agents. If the strategic resource is a one-time expenditure, use the number of resources whose cost has not yet been fully amortized.

Hiring Steps

A hiring step is a component of a hiring plan. The metrics you configure for each step are used to determine how many candidates must enter the hiring pipeline to meet future agent requirements as determined by a strategic forecast.

Managing Hiring Steps

Use the Hiring Steps page (Application Management > Strategic Planning > Hiring Steps) to create, edit, and delete hiring steps.

You can edit and delete steps that are being used as part of a hiring plan. Once a step is added to a hiring plan, the step's attributes remain as they were at that time. The step can be deleted here and not affect the plan it was made a part of.

The fields on the Hiring Steps page are described below.

Field	Description
Select Hiring Plan Step	Select an existing step for editing or deletion.
Step Name	Enter the name of the hiring step.
Duration	Enter the number of days the step lasts. This value must be a whole number.
Attrition Rate	Enter the percentage of candidates that drop out from the hiring process during this step. This value must be a whole number.

Hiring Plans

A hiring plan is a sequence of hiring steps that describes the process of hiring agents to meet future requirements in your contact center. Hiring plans are used in conjunction with strategic resources and the strategic forecast to generate the Strategic Hiring Plan Report.

Managing Hiring Plans

Use the Hiring Plans page (Application Management > Strategic Planning > Hiring Plans) to create, edit, and delete hiring plans.

The fields on the Firm Date Associations page are described below.

Field	Description
Plan Name	Enter a unique name for the hiring plan.
Plan Details	Select the desired *Hiring Steps* from the left pane and move them to the right pane. You can rearrange the hiring steps in the right pane using the up and down arrows.

Vacation Planning

The pages in this section of Application Management enable you to configure and manage agent time off.

The pages are:

HRMS Integration

WFM can be configured (using the WFM Configuration Setup utility) to integrate with your Human Resources Management System (HRMS). This means that vacation plans are imported from the HRMS to WFM, and the number of vacation hours used by agents are exported from WFM to the HRMS. In this way, the Vacation Hours section on the Agents page contains current information for each vacation type:

- Hours of vacation earned
- Hours used
- Hours approved (but not yet taken)
- Hours remaining

Note: Agents must be assigned to a Full Time Equivalent Profile in order for their hours to be included in these calculations. See *Full Time Equivalents Profiles* for more information.

Systems that do not have HRMS integration use vacation plans created on the *Vacation Plans* page. Systems that do have HRMS integration do not include the Vacation Plans page—the information from the HRMS replaces the information that is configured there.

For more information on how to integrate HRMS with WFM, see the *Workforce Management Data Import Reference Guide*.

Vacation Plans

Vacation plans are the time off plans assigned to agents. You can create multiple vacation plans to manage time off for various types of agents, for example, part-time agents and full-time agents. How this is managed is specific to your contact center. Vacation plans can be configured for different date ranges.

The vacation types that make up a vacation plan are user-configurable (see *Vacation Types*). How each of these vacation types are defined is up to your contact center. In order to track hours used against each of these vacation types, you map exceptions to each type.

Note: The Vacation Plans page is present only in systems that do not use *HRMS Integration*. Systems that do use HRMS integration get their vacation plans from the HRMS.

Best Practice: We recommend that multi-national companies create separate vacation plans for each country in which they operate.

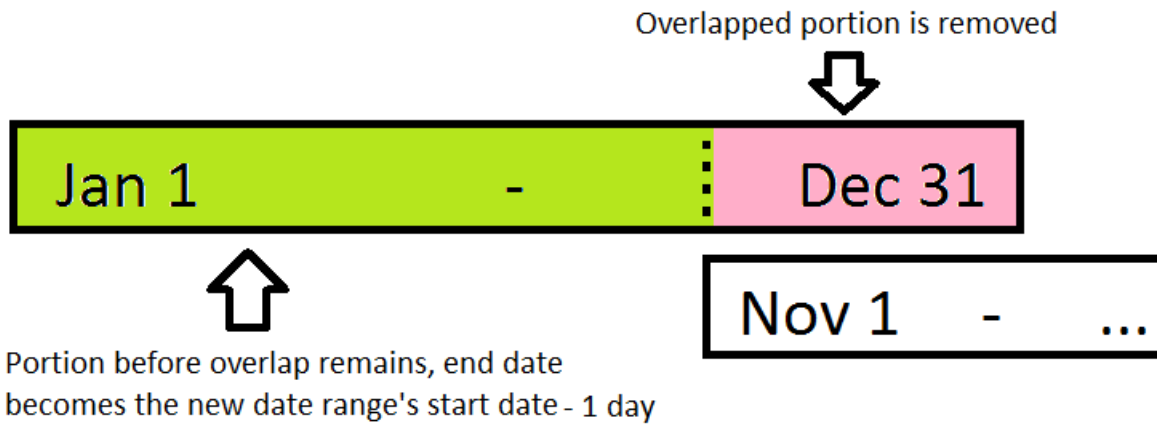
Overlapping Vacation Plans

Agents can be assigned to multiple vacation plans, but to only one vacation plan for a specific date. The following scenarios explain what happens when an agent is assigned to vacation plans that overlap.

Note: If you assign a plan to agents that overlaps an old plan, it is up to you to reallocate the hours in the plans. For example, iff there were 40 hours of vacation in the old plan and you then add a new plan for the second half of the year, it is up to you to reallocate those 40 hours between the two plans.

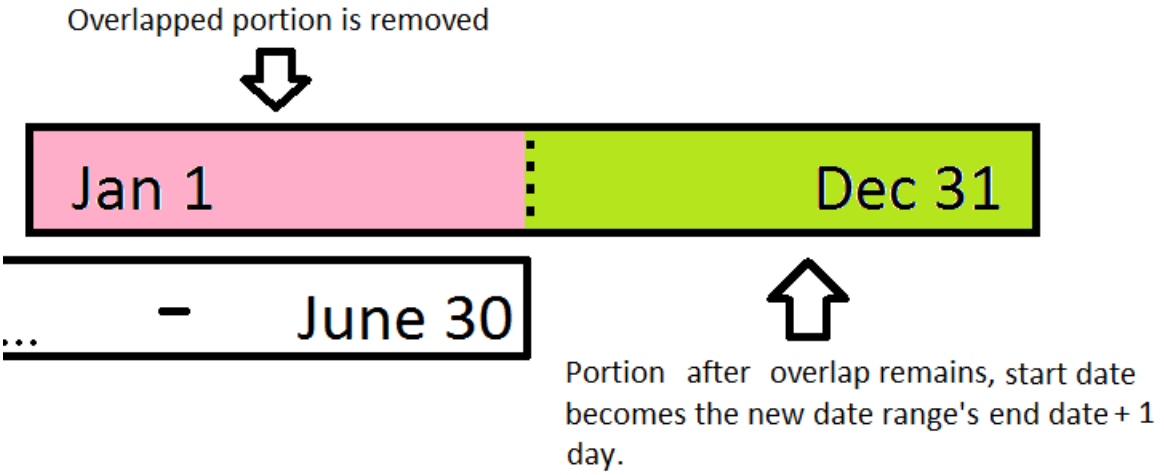
Scenario 1

In this scenario, a new vacation plan date range overlaps the end of an existing vacation plan date range.



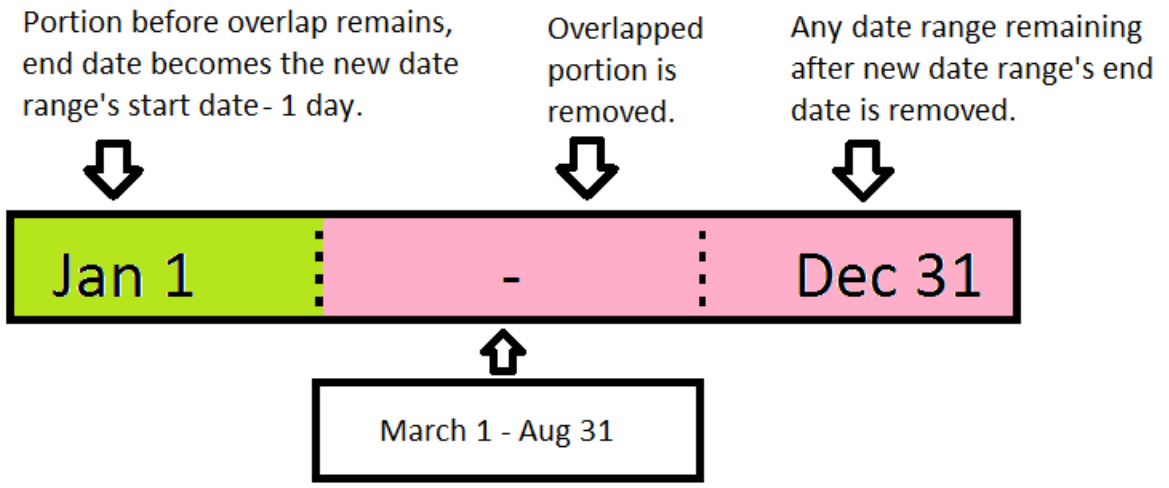
Scenario 2

In this scenario, a new vacation plan date range assignment overlaps the start of the existing vacation plan date range assignment.



Scenario 3

In this scenario, a new vacation plan date range assignment overlaps a segment between the start and end date of the existing vacation plan date range assignment.



Scenario 4

In this scenario, a new vacation plan date range matches the existing vacation plan date range, or completely encompasses the existing vacation plan date range (it begins before the existing plan's start date and ends after the end date). The result is that the new vacation plan replaces the old vacation plan.

Managing Vacation Plans

Use the Vacation Plans page (Application Management > Vacation Planning > Vacation Plans) to assign create, edit, and delete vacation plans.

The fields on the Vacation Plans page are described below.

Fields	Description
Plan Name	Enter a unique name for the plan. An example of a name is "Full time up to 5 years service"
Select Plan	Select the vacation plan you want to edit or delete.
Vacation Types/Allocated Hours	Select the vacation types to include in this vacation plan and enter the number of hours allocated for each vacation type. You can add up to 20 vacation types to one vacation plan.
Assign Agents	Select the agents you want to assign to this plan. An agent can be assigned only one plan on any given date.
Start Date for Selected Agents	Select the start date of the period the plan applies to for the selected agents.
End Date for Selected Agents	Select the end date of the period the plan applies to for the selected agents.
Assign button	Click this button to assign the selected agents to the plan for the configured date range. Clicking the button saves your changes.
Review Assignments	Enter a date and click Search to view a list of all agents assigned the selected vacation plan for the date you entered. The search results show the date range of the plan assignment for each agent.
Delete Selected Assignments button	To unassign an agent from the vacation plan for the displayed date range, select the check box next to the agent's name and click this button.

Full Time Equivalents Profiles

If you are using the strategic planning and vacation features, you must create full time equivalents profiles and assign agents to these profiles. WFM uses full time equivalents profiles when creating strategic plans and analyzing vacation requests.

A full time equivalent (FTE) is equal to the number of total scheduled person hours divided by the number of hours per week that constitute a full time person (for example, 40 hours or 35 hours). An FTE might consist of several part time individuals whose combined work hours in a week equal the full time person, but might not incur benefits expenses.

For forecasting and planning purposes you need to establish the number of hours an agent is paid per week (for example, 20, 35, or 40 hours). WFM uses this value to determine the number of FTE agents required for a forecast. If the number of paid hours is 40 and the forecast calls for 80 hours, you need two full time agents.

Example: A contact center has 100 agents. An FTE is 40 paid hours a week (160 hours a month), and an FTE agent earns $3,000 a month. All agents are required to take eight hours of training this month. That is 800 hours of training for the month (100 × 8). If you change the number of hours training to FTEs, you would need five FTEs (800 ÷ 160), which corresponds to $15,000 spent on training for this month (5 × $3,000). By using strategic planning to determine costs in advance, managers can ask for fewer training hours in relation to their budget or spread the training out over a period of two or three months.

Managing Full Time Equivalents Profiles

Use the Full Time Equivalents Profiles page (Application Management > Vacation Planning > Full Time Equivalents Profiles) to create, edit, and delete full time equivalent profiles.

The fields on the Full Time Equivalents Profiles page are described below.

Field	Description
FTE Name	Enter a unique name for the FTE profile.
Minimum Hours per Week	Enter the minimum number of paid hours per week for this profile.
Maximum Hours per Week	Enter the maximum number of paid hours per week for this profile.
Assign Agents	Assign agents to this profile. This is required for vacation planning. An agent cannot request time off unless the agent is assigned to an FTE profile.

Vacation Types

The Vacation Types page enables you to create and manage vacation types, and associate exceptions with specific vacation types. This lets you customize exactly what each vacation type means in your contact center. An exception can be mapped to only one vacation type.

WFM then can track how many hours of each type of vacation have been used by an agent. In systems with HRMS integration (see *HRMS Integration*), this information is exported to a file that can be imported into the HRMS on a daily basis. In systems without HRMS integration, this information is applied to the vacation plan configured for each agent. In both systems, the vacation hours available to an agent are displayed on the Agents page and can be reported on in the Vacation Status report.

Note: To view and change vacation type settings, users must either be Administrators or Schedulers with the Enterprise View, or be Administrators or Schedulers who are Workflow Administrators. These users can create and edit all vacation types.

Best Practice: We recommend that multi-national companies create separate vacation types for each country in which they operate.

Managing Vacation Types

Use the Vacation Types page (Application Management > Vacation Planning > Vacation Types) to create and manage vacation types and assign exceptions to them.

The fields on the Vacation Types page are described below.

Field	Description
Vacation Type Name	Enter a unique name for a vacation type, or select an existing vacation type.
Exceptions	Assign the desired exceptions to the vacation type. Each exception can be assigned to only one vacation type. Select one exception to be the workflow exception used for this vacation type. **Note**: A workflow exception must be specified for each vacation type for Time Off requests to be approved by a workflow.

Time Off Report

The Time Off Report (Application Management > Vacation Planning > Time Off Report) is a quick way to see a list of agents who have time off scheduled on a selected date. As soon as a date is selected in the Date field, the list of agents is displayed.

The list if read-only. If desired, you can export the list as a comma-separated values (CSV) file by clicking the Save as CSV button.

Time Off Allotments

Time off allotments are used to assist in managing time off requests. A scheduler or administrator sets the maximum number of FTEs per service queue that can have time off for each day of the year. When an agent requests time off, the agent can display a table showing the current available number of FTEs on a specific day and the gap between the forecasted FTEs and scheduled FTEs for that day. If the gap is negative, the service queue is understaffed; if it is positive, the service queue is overstaffed. The allotted FTE number reflects how much time off has already been approved for that day.

Note: If a time off request is approved via a workflow, then the workflow updates the allotment for an agent's main service queue. If the agent does not have a main service queue or the agent's main service queue does not have allotments configured for it, then no used allotments are updated.

The impact of an agent's time off on the daily allotment is calculated as a fraction of the Default FTE per Day (configured on the *Global Settings* page). The agent's daily FTE is used for a whole day off. The agent's daily FTE is calculated by dividing the agent's weekly FTE by five.

For example, if three agents ask for September 10 off, and their daily FTEs differ, the following table shows how that impacts the time off allotment for that day. In this case, the Default FTE per Day is configured to be 8 hours and the time off allotment for that day is 3 FTEs.

Time Off Requester	Agent's Daily FTE	Default Daily FTE	Impact Calculation
Agent A	4	8	4 ÷ 8 = 0.5 FTE
Agent B	6		6 ÷ 8 = 0.75 FTE
Agent C	8		8 ÷ 8 = 1.0 FTE
Total			2.25 FTEs
Remaining Time Off Allotment for September 10			3 – 2.25 = 0.75

Therefore, after these agents' time off requests are approved, the time off allotment remaining for September 10 is 0.75 FTE.

Note: If an agent belongs to multiple service queues, the supervisor who approves a time off request determines which service queue's FTE allotment it applies to.

Managing Time Off Allotments

Use the Time Off Allotments page (Application Management > Vacation Planning > Time Off Allotments) to create, edit, and delete time off allotments for service queues.

The fields on the Time Off Allotments page are described below.

Field	Description
Service Queue	Select the service queue whose allotments you want to configure.
Year	Select the year to configure.

Field	Description
Month	Select the month to configure. If you select a specific month, you will be able to configure the allotments for that month only. If you select All, you will be able to configure the allotments for the entire year.
Quick Entry	To quickly enter values in the allotment table, enter the desired allotment for each day of the week. That value is then written to each corresponding day of the week in the allotment table. When your cursor is in the field for a specific day, the corresponding days in the allotment table are highlighted in blue. You can edit the values in the allotment table after you have filled it using Quick Entry.
Copy To	Once you have configured and saved the allotments for the service queue, you can copy those values to another year for this service queue, or to another service queue for any year. Even if you configure only one specific month's allotments, the copy action fills all other days with blanks and overwrites the entire year's allotments for the other service queue or year.

System Configuration

The pages in this section of Application Management enable you to configure system-wide settings in the WFM environment and manage user requests.

The pages are:

Global Settings

The Global Settings page enables the administrator to set up system-wide parameters for WFM. These parameters are defined in the following table.

Updates to global settings do not go into effect on client desktops until users refresh or restart their browsers.

Parameter	Description
First Day of the Week	Sets the first day of the week of the schedule. The default value is Sunday. Do not change this setting if you have already set up and assigned work shift rotations. If you do change it you will have to create new work shift rotations to incorporate the change. If agents have completed dynamic scheduling, you will have to reschedule all the dynamic scheduling. If agents have completed dynamic availability selections, you will have to delete and reassign all dynamic availabilities. If there are min/max hour conditions assigned to service queues or agents for specific date ranges, you will have to delete and reassign them. If there are schedule release profiles with date ranges, you will have to delete and re-add them.
Number of Weeks Visible in Agent Schedules	Sets the number of future weeks that are displayed in agent schedules.
Default Time Zone	Sets the time zone that is used by default in agent schedules. If you change it again, it applies to all users who are configured from that point on. You can apply the changed time zone to all current users by clicking the Apply to All Users button.
Default FTE per Day	Sets the default number of paid hours per day worked by a full time equivalent. This value is used for vacation planning purposes only.
Default FTE per Week	Sets the default number of paid hours per week worked by a full time equivalent. This value is used for strategic planning purposes only.
Agent Access to Time Off Allotment Information	When the “Allow agents to view time off allotments” check box is selected, agents can view the time off allotments configured for a service queue when requesting time off. A button called Time Off Allotments is added to the Time Off Request dialog box. When the check box is cleared, this button is not present in the dialog box.
Workflow Wait List Reevaluation Time	Sets the daily time when the workflow wait list is reevaluated for possible action.
Workflow Administrators	(Optional) Select the schedulers and administrators to have permission to create and manage agent request workflows, vacation types, and exception types.

Parameter	Description
Real Time Adherence Refresh Rate	Select the rate at which real-time adherence (RTA) metrics are updated on your screen. The default is 30 seconds. **Note:** WFM captures RTA metrics in real time, regardless of the real time adherence refresh rate. Calculated RTA metrics (adherence and conformance percentages) are captured every 15 minutes. The real time adherence refresh rate you select takes effect after the next scheduled calculation (up to 15 minutes after you make your selection).
Assigned Exceptions Scheduling Preference	Select the preferred method of generating variable schedules for agents who have assigned exceptions. If you choose “Avoid assigned exceptions” WFM attempts to create shifts that avoid the assigned exceptions in order to maximize coverage. If you choose “Include assigned exceptions” WFM attempts to create shifts that include the assigned exceptions, but that can result in insufficient coverage. A reason to use this option is that the assigned exception is for a required event, such as a team meeting.
Other Agent Schedule Details	When "Restrict schedule view to shift start/stop time only" is selected, agent's detailed schedule activity start and stop times is hidden from agents when they are viewing other agent's schedules. Only the agent's shift start and stop times will be visible.
Schedule Release Profile	(Optional) Select the schedule release profile that applies to new agents. If left blank, schedules are displayed to new agents according to Number of Weeks Visible in Agent Schedules. See *Schedule Release Profiles* for more information.

User Requests

Schedulers and administrators can send requests to the server to produce various scheduling and planning results. These requests are put into a queue and processed one at a time.

Note: Administrators can see all requests. Schedulers can see only the requests that they generate.

The User Requests page (Application Management > System Configuration > User Requests) lists all the requests that are run. The list displays the request type, the time and date the request was submitted, the name of the user who made the request, and the current status of the request.

The requests can be filtered and sorted by any column. Requests stay in the list until they are deleted.

Note: Requests that are scheduled to be run at a later date and time than when they are submitted are shown as Pending until they run.

Note: If a capture request is in pending state for longer than seems reasonable, consult the log for possible reasons the request is not being processed.

Managing User Requests

By default all requests are displayed on the User Request page, with the most recent request at the top of the list.

- To filter the list, enter your selection criteria and click Display User Requests.
- To sort the list, click any column header to sort the table in ascending or descending order.
- To view more details about a request, click View Details to display a popup with the details.
- To delete one or more requests from the list, select the check box next to the request and click Delete. To select all requests for deletion, select the check box at the top of the table.

Note: You cannot delete requests that are tagged as In Progress. Requests that are tagged as Success, Partial Success, Failure, and Pending can be deleted.

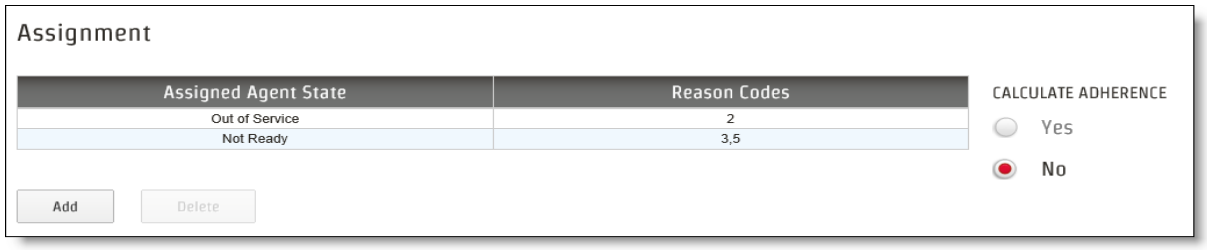
Adherence State Mappings

The Adherence State Mappings page (Application Management > System Configuration > Adherence State Mappings) enables you 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 are used to calculate agent adherence percentages.

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

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.

Example: In the following figure an administrator has mapped two ACD agent states, Out of Service (with reason code 2) and Not Ready (with reason codes 3 and 5), 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 3 or 5 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 option is set to "No".

The following table lists the columns that appear in the Adherence State Mapping page.

Name	Description
Assigned Agent State	The agent state and reason code used to calculate agent adherence to the schedule activity.
Reason Codes	The reason codes associated with the agent state and 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 Mappings

To customize how adherence is shown and calculated in your contact center:

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, select the field and click Delete.
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. Select the Calculate Adherence option you want. 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.

To revert the adherence state mapping settings to the default configuration:

- Click Reset.

Adherence State Mapping for Non-Interactive Service Queues

Adherence can be calculated for non-interactive service queues (for example, those that handle customer email). Since the default settings are intended for service queues that support interactive customer contacts, you must configure custom mappings of all ACD states that agents are allowed to be in when handling non-interactive contacts.

Example: Your contact center might want to map the following agent states to the In Service activity for a service queue that supports non-interactive customer contacts:

- Ready Available
- Talk
- After Contact Work
- Hold
- Out of Service (reason code 10)
- Not Ready (reason code 20)

Notifications

The Notifications page (Application Management > System Configuration > Notifications) enables you to configure the kinds of notifications WFM sends to users. This is a global setting and cannot be customized for specific roles.

When enabled, users will receive that type of notification via the Alerts feature.

Notification Type	Description	Expiration
Server Request	Notifies users who submitted server requests of the status of those requests.	None. They must be deleted manually.
Messaging	Notifies agents when their requests are approved or denied, and when another agent has sent a request to them.	When the date that the change request was made for is passed, and the alert is more than 5 days old.
Schedule Reminder	Notifies agents of upcoming schedule activities 15 minutes before the start of the activity when the agent is logged into WFM.	When the start time of the reminded activity is passed.
Schedule Change	Notifies agents when their schedules are changed within their visible weeks. This includes intraday dynamic scheduling events.	When the date of the schedule change is passed, and the alert is more than 5 days old. The 5-day limitation does not apply to intraday dynamic scheduling events.

To enable or disable notifications, follow these steps:

1. Select or clear the check box next to the type of notification you want to enable or disable.

   Note: Server request notifications are enabled by default. All other types of notifications are disabled by default.

2. Click Save.

Import and Export

The Import and Export page (Application Management > System Configuration > Import and Export) enables you to import and export user, agent, and team information by means of CSV format files.

Imported data will overwrite existing records with the same ID. New users, agents, and teams will not have any ID associated with them (the field in the CSV file is empty) and will be added to the database as new records. The system creates IDs for them when they are added.

The import files must conform to the required column order defined below.

When you upload an import file, the contents of the file are previewed on the page. You can edit the data if necessary in the preview, and then finalize the import into the database. Export data is also presented in the preview mode, but it cannot be edited.

CSV File Format

The following tables define the order and content of the columns that are required in the user, agent, and team import and export files.

Note: All fields are required in the CSV file unless specifically called out as optional. The header line is required in import files.

Note: The date format in the CSV files (YYYY-MM-DD) might be changed by a spreadsheet application such as Microsoft Excel to the format that is set in the application as the default. Be aware of this possibility and make sure that the date columns are configured so that the date format is correct.

Users Import and Export Files

Column	Header	Description
1	ID	The unique ID that identifies the user. For new users, leave this blank.
2	First Name	The user's first name.
3	Last Name	The user's last name.
4	User Name	The WFM username. In an Active Directory environment, this is the user's AD username. This field cannot be blank.
5	Active	TRUE or FALSE (case insensitive). Indicates if the user is activated in WFM. If the value in this field is anything except TRUE or FALSE, it is treated as FALSE.
6	ACD ID	The user's ID in the ACD, used to link an agent to this user record. If left blank, an existing user will be unlinked from a previously linked agent.
7	Creation Date	The date the user record was created, in YYYY-MM-DD format. For existing records, any changes made to this field are ignored, and the original creation date of the record will be maintained.
8	Deactivation Date	The date the user record is deactivated, in YYYY-MM-DD format. This field can be blank.

Column	Header	Description
9	Display Time Zone	The display time zone for the user. Valid values are the <continent>/<city> shown in the Display Time Zone drop-down list on the Users page, for example, America/Chicago or Asia/Seoul. If left blank, the time zone defaults to the Cisco server time zone.
10	Roles	The roles assigned to the user. There can be multiple roles, separated by a semicolon. Valid options are AGENT, SUPERVISOR, and SCHEDULER (case insensitive), or blank.
11	Views	The views assigned to the user. There can be multiple views, separated by a semicolon. Valid options are any existing views in the system, or blank. This field is required if the Active field value is TRUE. It can be blank only if the Active field value is FALSE.
12	Main View	The user's main view. If only one view is listed in the Views field, then this field can be left blank and that view will become the main view. If more than one view is listed in the Views field, then this field must contain one of those listed views and cannot be blank.

Agents Import and Export Files

Column	Header	Description
1	Agent ID	The unique ID that identifies the agent. For new agents, leave this blank.
2	First Name	The agent's first name.
3	Last Name	The agent's last name.
4	Employee ID	The agent's unique alphanumeric ID within WFM.
5	ACD ID	The agent's ID in the ACD.
6	Active	TRUE or FALSE (case insensitive). Indicates if the agent is activated in WFM. If the value in this field is anything except TRUE or FALSE, it is treated as FALSE.
7	Company Start Date	The agent's start date in the company, in YYYY-MM-DD format.

Column	Header	Description
8	Department Start Date	The agent's start date in the department, in YYYY-MM-DD format.
9	Rank	The agent's ranking in the contact center, based on expertise. This field can be blank.
10	Company End Date	The agent's end date in the company, in YYYY-MM-DD format. This field can be blank.
11	Work Condition Profile	The agent's work condition profile name.
12	Teams	The teams assigned to the agent. There can be multiple teams, separated by a semicolon. Valid options are any existing teams in the system.
13	Main Team	The agent's main team. If only one team is listed in the Teams field, then this field can be left blank and that team will become the main team. If more than one team is listed in the Teams field, then this field must contain one of those listed teams and cannot be blank.
14	Skill Mappings	The skill mappings assigned to the agent. There can be multiple skill mappings, separated by a semicolon. Valid options are any existing skill mappings in the system, or blank.

Teams Import and Export Files

Column	Header	Description
1	ID	The unique ID that identifies the team. For new teams, leave this blank. If it is not blank, the new team will not be created.
2	Name	The team's name.
3	Productivity	TRUE or FALSE (case insensitive). Indicates if the team will be included in productivity statistics. If the value in this field is anything except TRUE or FALSE, it is treated as FALSE.

Importing Data

To import data into WFM, follow these steps:

1. in the What Do You Want To Do? section, select Import.
2. In the Import Options section, choose the type of data you want to import.

   Note: If you are updating existing records, the order in which you import the data does not matter. If you are importing new records, the order does matter. Teams must be in the system before you can add agents, because those agents must belong to a team. Finally, agents must be in the system before you can link them to users.

3. In the Team, Agent, or User Import section, browse to the location of the CSV file that contains the data you want to import. The data in the file is displayed in the preview table. You can edit any of the entries in the preview table by clicking in the table cell and typing your correction. You can also resize the columns in the preview table by dragging the header cell's border to the left or right, and sort on any column by clicking in the column header.
4. When you are satisfied with the data, click Import to import the data into the WFM database.

Exporting Data

To export data from WFM, follow these steps:

1. In the What Do You Want To Do? section, select Export.
2. In the Export Options section, choose the type of data you want to export. As soon as you make your selection, the preview table is populated with the data. This data is read only, you cannot edit it.
3. Click Export. The data is saved to the default browser download location in a file named according to this format:

   <type of data>-YYYY-MM-DD.csv (for example, Agents-2015-10-25.csv)

Schedules and Planning

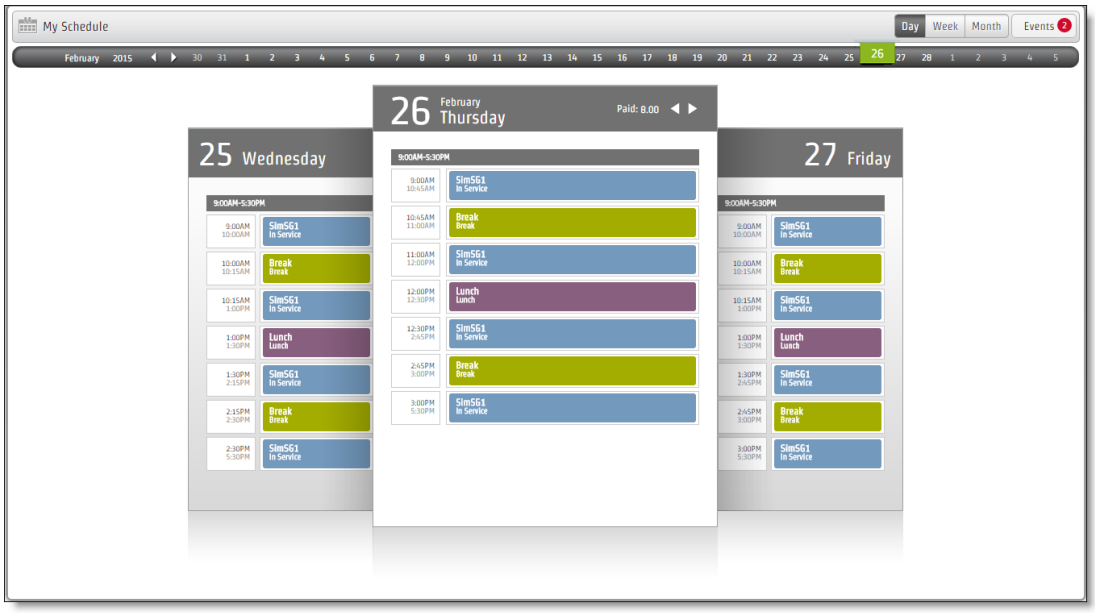
The Schedules and Planning application allows you to view and manage schedules. The components available to you depend on your role.

Available components are:

- My Schedule
- My Availability
- Agent Schedules
- Planning

My Schedule

My Schedule allows you to view your schedule by day, week, or month, and any intraday dynamic scheduling events available to you.



By default, My Schedule 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.

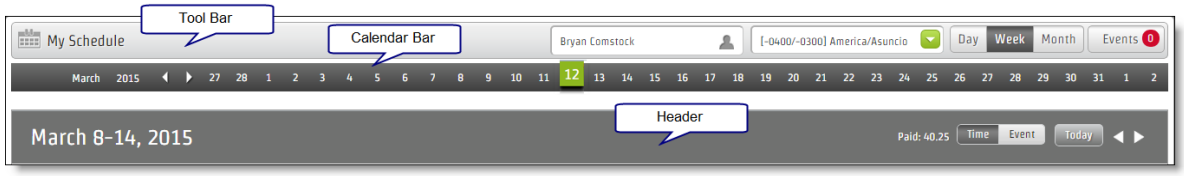
If you are a supervisor, you can view your own schedule and the schedules for agents on your teams, and change the time zone a schedule is displayed in.

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 allows you to view your schedule by day, week, or month.

The graphic below displays the toolbar, calendar bar, and header seen by supervisors, schedulers, and administrators. The agent's view is identical except that the Select Agent and Select Time Zone fields are not present on the toolbar.



The following table describes the My Schedule toolbar, calendar bar, and header functionality.

Field	Description
Toolbar	
Select Agent	(Supervisors, administrators, and schedulers only) Select the agent from the drop-down list whose schedule you want to view.
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* 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.
Events	Click to view intraday scheduling events you have been invited to participate in.
Calendar Bar	

Field	Description
Month and year	The month and year displayed is shown at the left end of the calendar bar. You can quickly navigate to another date by clicking the month and year and choosing the desired period from the drop-down menu.
Day view/Week view	Click any specific date from the 4 to 6 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 red. 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.
Month view	Click any month from the 12 months displayed to view the schedule for that month. Four to 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 red. 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.

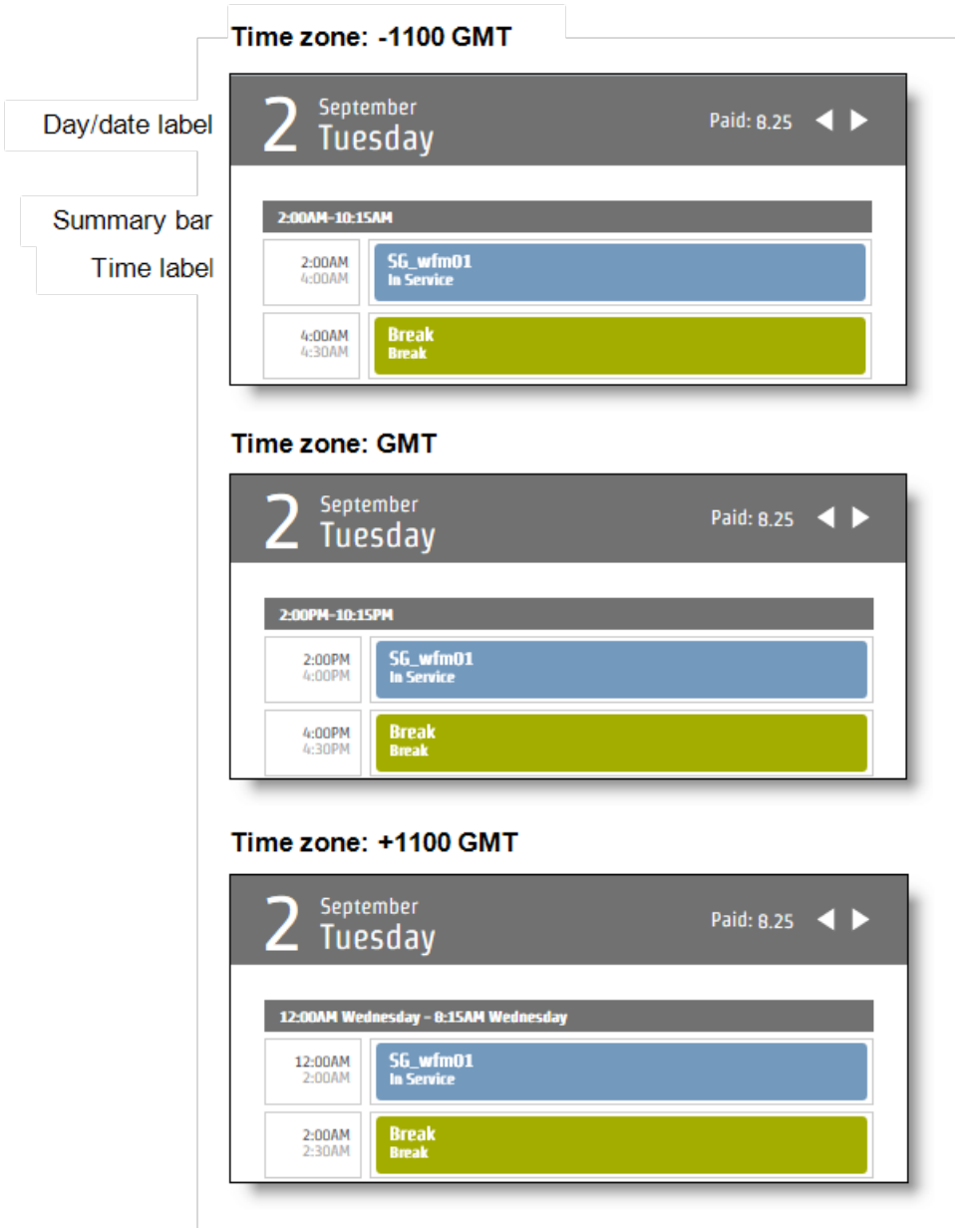
Field	Description
Today	(Week and Month view only) Click to display the week or month that contains today's schedule.
Left/Right Arrows	Click to move you one day, one week, or one month back and forth in the schedule, depending on the view you are using.

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.

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 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.



The figure above shows the same schedule in three different time zones. Note that, while the time labels change, the day/date labels do not.

If the time shift forces the schedule onto another day, that is shown in the summary bar.

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

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, schedulers, and administrators also see their schedules and the schedules of the agents on their teams in the time zone assigned to the their user account. For example, 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, schedulers, and administrators can control which time zone is shown in My Schedule by changing it in the time zone drop-down list. For example, 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 display time zone set on the user's Users record.

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.

Accessing Your Schedule Outside of Work

Agents can view their schedules outside of work through an email client or calendar application on a mobile device or personal computer. The email client or calendar application displays your WFM schedule as it appears in the WFM interface by reading the iCalendar data file from the WFM iCalendar Service.

Note: The iCalendar feature is only supported for agents, not supervisors, schedulers, or administrators.

Note: Agents can view only their own schedule.

Note: The color coding that appears in the WFM interface is not displayed when you view the WFM schedule on your mobile device or personal computer.

The following clients and devices are supported:

- Apple devices such as an iPhone or iPad (in conjunction with the Apple Calendar app)
- Microsoft Outlook
- Android devices such as a tablet or phone (in conjunction with a calendar app that can read an .ics file)

Consult your client or device documentation for exact instructions on how to add or import a calendar. Your mobile device or email client will typically access your WFM schedule via a URL. Ask your administrator for the correct URL. The format for the URL is as follows, where <base server> is the IP address of the WFM base server:

`https://<base server>:4430/calendar` (secure) or
`http://<base server>:8086/calendar` (unsecure)

You will be prompted for a username and password. These are the same login credentials you enter when logging in to WFM. If you are using Active Directory, you must use <domain>\<username> or <username>@<domain>.

Note: If you are integrating your schedule into Microsoft Outlook, you must use two back slashes (\\<domain>\<username>).

Dynamic Scheduling

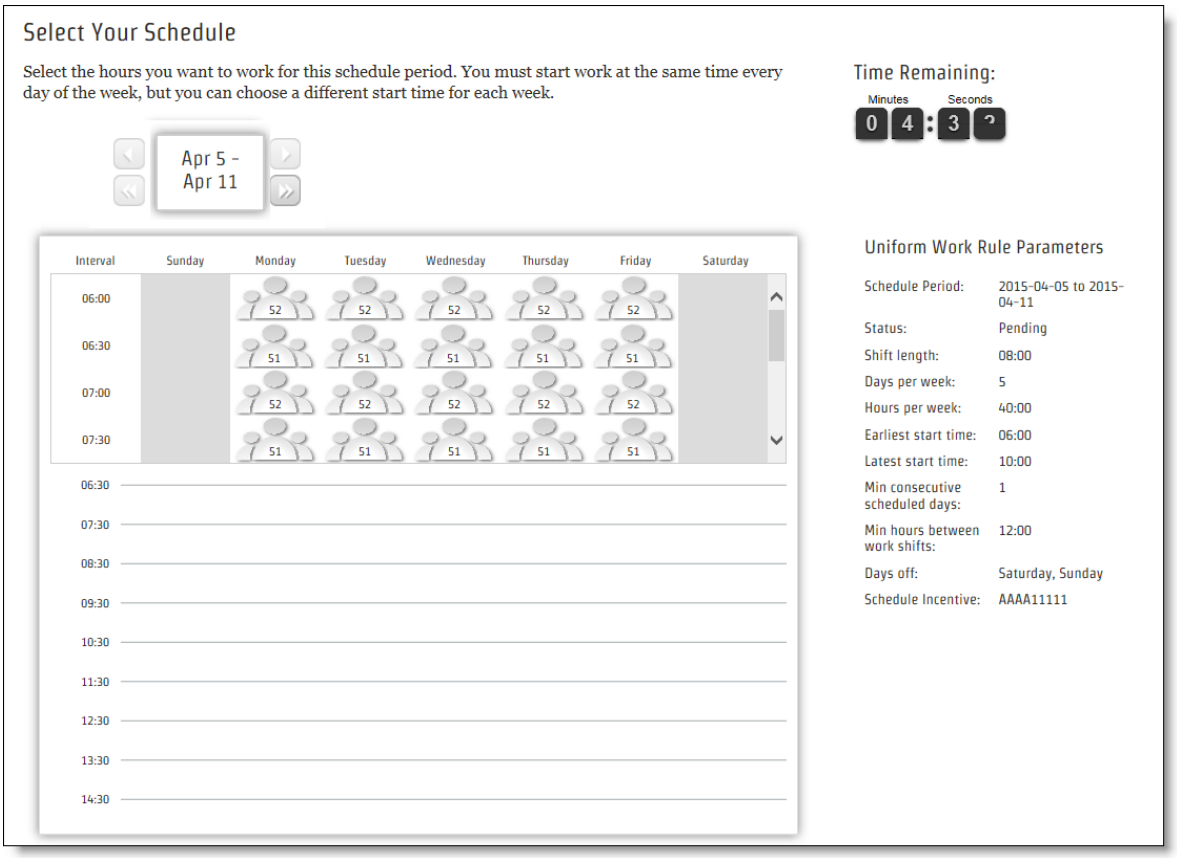
The dynamic scheduling feature enables you to create your own schedule for specific weeks if configured to do so by your administrator or scheduler.

If you are included in a dynamic scheduling event, you will see an event exception appear in your daily schedule. The exception includes a link that will take you to the Agent Dynamic Scheduling page.

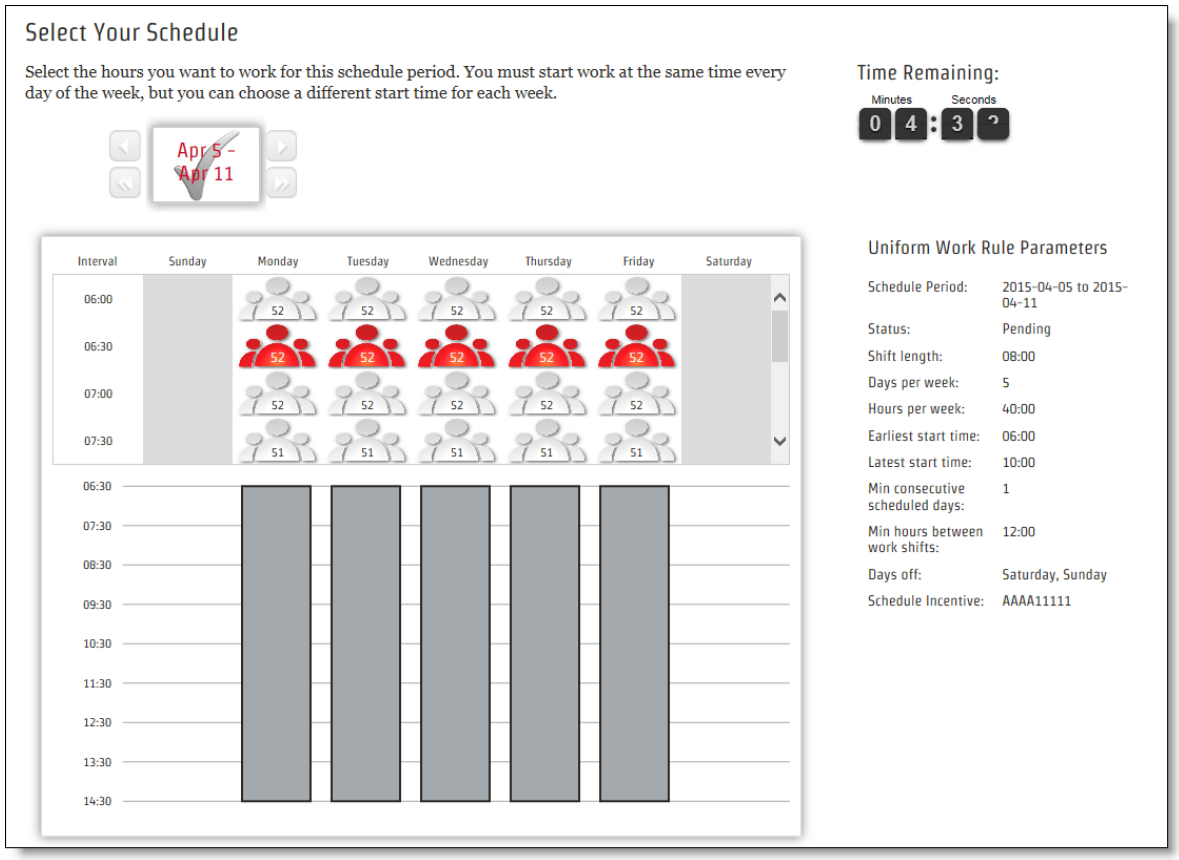
Note: The only time you can create your schedule is during the exception. Once that time is past, you can only view, not edit, the Agent Dynamic Scheduling page.

When you first access the page you will see the following:

- Work rule parameters for the schedule you will be creating. There are three kinds of work rules: uniform, hybrid, and variable.
- Staffing icons that give you an idea of the staffing needs for the intervals that cover the times you can start your shift. In this graphic, the parameters say that you can start work any time between 07:00 and 12:00, so the staffing icons are displayed for every half hour interval between those times.
- A countdown timer that tells you how much time is left for you to create and submit your schedule. Once the countdown timer reaches zero, you can no longer edit or submit your schedule.



When you select your schedule, it is depicted by gray bars underneath the staffing icon section.



Staffing Icons

The staffing icons depict the relative need for staffing for a shift starting in that interval.

You might see a number on a staffing icon (if your administrator configured dynamic scheduling to include them). The number conveys the same information as the staffing icon, it is just an alternative way to display it.

The staffing icon and number are determined according to the kind of work rule configured for the work shift.

Work Rule	Calculation
Uniform	The average staffing need across all work days for shifts beginning in that interval.
Hybrid	The average staffing need for the shift length for that day beginning in that interval.
Variable	The average staffing need for the selected shift length for that day beginning in that interval. When you first view the page, the icon displayed is based on the configured minimum shift length. When you specify a shift length, the icon and number can change accordingly.

The average staffing need for a shift is computed by considering the forecasts for all service queues that the agent is configured to work as well as the agents who have previously submitted dynamic scheduling shift selections. The average staffing need is computed by averaging these values over all intervals in the shift (not just the shift's starting interval). This average is rounded up to the nearest whole number.

Example

The forecast for service queue A indicates that 10 agents are needed for every interval in the day. Agent X only works on service queue A and is the first agent to sign up in a dynamic scheduling event. Agent X will see 10 for the staffing need as the average need for the shift starting on any period will be 10. Agent X indicates that he wants to start his shift at 10:00 am each day.

Agent Y is the second agent to sign up in the same dynamic scheduling event. She has the same work rules (including shift length) as Agent X, and works the same service queue (A). Agent Y will see exactly 1 less for the 10:00 am interval, but other intervals might or might not be less. The 10:00 am interval will be exactly 1 less because the staffing need for that shift will now be 9 agents for every interval in that shift, and the average when all intervals are 9 is 9. For overlapping shifts before and after 10:00 am, some intervals will need 9 and others will need 10, so the average will be 9.x, rounding up to 10.

Multiskill Agents

The staffing need considers all service queues that an agent can work. If an agent is configured to work both service queue A with a need of 10 agents, and B with a need of 20 agents, then the agent will see that the need for that shift is 30.

When multiskill agents make their shift selections, the remaining staffing need for all of their skills goes down.

If skill mappings are used to configure multiskill agents, then agents count equally towards each service queue that they are mapped to. This means that when an agent who is mapped to both service queue A and service queue B submits a dynamic scheduling shift selection, that agent counts as 0.5 agents for every interval in that shift for both service queue A and service queue B.

If multiskill groups are used to configure multiskill agents, then agents count proportionally towards each service as defined in the multiskill group settings.

Creating Your Own Schedule

Important! You have a limited time to create your schedule. Keep an eye on the countdown timer so you don't run out of time. Once the timer reaches zero, you can no longer edit or submit your schedule.

To create your own schedule:

1. Click the link in the dynamic scheduling exception in your schedule to access the Agent Dynamic Scheduling page.
2. Based on the work rule parameters listed to the right of the scheduling grid, select the start time for each day you will work. Use the staffing icons to help you determine which shifts have the most staffing requirements and choose accordingly.

   Days that are set aside as days off display a gray column instead of any staffing icons.

   If you are scheduling according to a variable work rule, and you are allowed to select a day off, do not select a staffing icon for that day.

   Note: It is possible that the requirements for a day have been fulfilled by other agents before you attempt to schedule yourself. In that case, you cannot make a selection on that day. If all requirements have been fulfilled, you will not be able to complete your selections.
3. When every day in the week has been configured with a work shift, a check mark appears in

the date box to tell you that the work week is complete:

4. If you are to schedule more than one week, click the right arrow next to the date box to go to the next week, and create a schedule for that week.

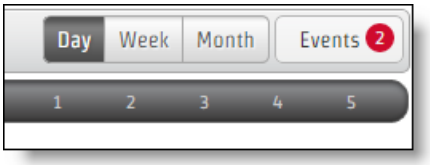
   Note: A different type of work rule might apply to each week you schedule.

5. When you have scheduled every week, click Submit.

Intraday Dynamic Scheduling

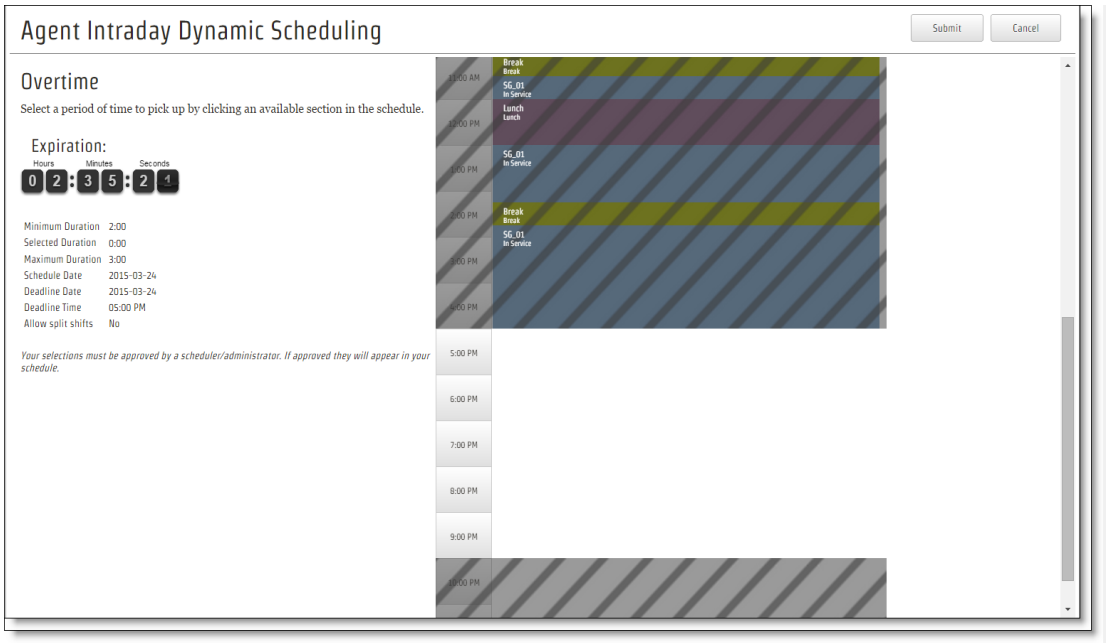
The intraday dynamic scheduling feature enables you to add voluntary overtime or time off, or both, to your own schedule if invited to do so by your administrator or scheduler. These changes are usually for the current day or for a few days in the future. If your administrator or scheduler sees that contact volume is lower or higher than expected, they might decide to meet the actual coverage requirements by offering some agents who support the affected service queue the option to take time off or add overtime.

If you are one of the agents who are invited to participate in an intraday dynamic scheduling event, you will see a number displayed on the Events button on your My Schedule page. In this image, the agent has been invited to participate in two events.



Changing Your Schedule

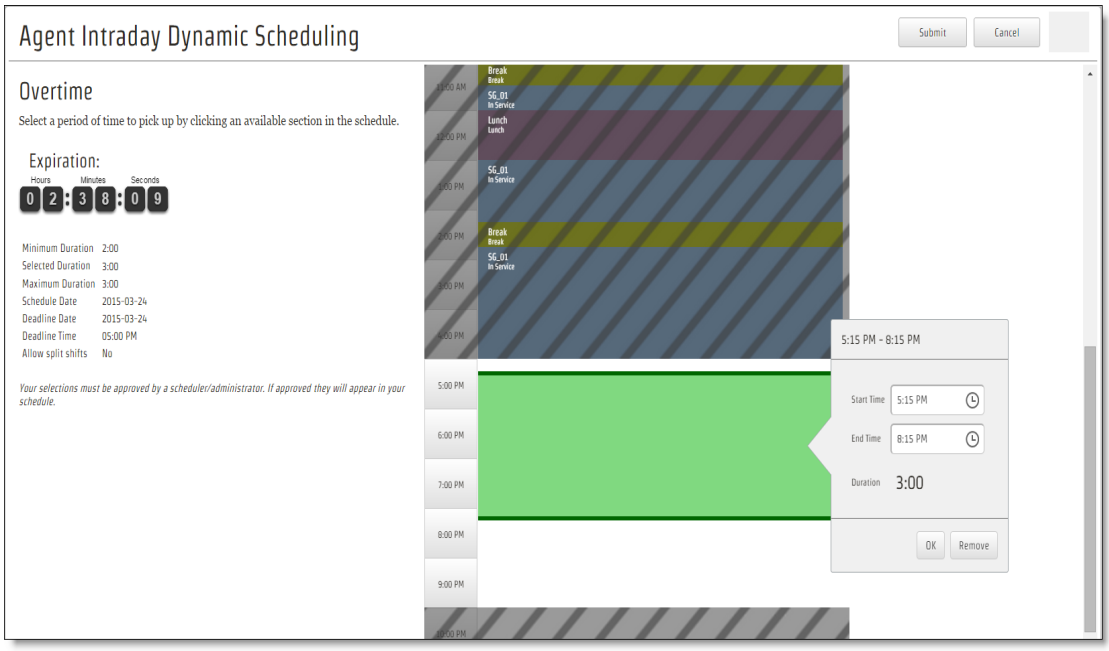
1. Click the Events button to display the event names as links.
2. Click the link to display the Agent Intraday Dynamic Scheduling page for that event. The initial view shows your schedule for the day of the event. Your existing schedule is shaded in gray. The event period is displayed as a blank area.



The text at the left of the page summarizes the details of the changes you can make to your schedule, and informs you if your schedule change must be approved before it goes into effect.

When min/max hour conditions have been configured for you, those details will also appear at the left of the page. Your schedule changes must be within the min/max hour limitations in order for the request to be submitted.

3. Click in the blank area to display a flyout panel. You can either click intervals in the blank area to select them or configure the start time and length of the time you want to select. Selected areas are shaded in green (overtime) or red (time off).



4. The page displays one kind of schedule change at a time. If you have been invited to change your schedule with both voluntary time off and overtime, there are buttons at the top of the page labeled OT and VTO. Use these to toggle between the two types of schedule change.
5. If you are given the option to schedule overtime or time off in multiple segments—the time does not have to be contiguous—an Add and a Remove button are added to the window.
6. When you are finished, click Save. A popup window is displayed that contains your revised schedule. Click Submit to confirm and submit your changes, or Cancel to return to the Agent Intraday Dynamic Scheduling, where you can make revisions, save them, and then submit them.

   If the event is set up so your changes are automatically approved, your schedule is updated immediately. If the event is set up to require approval from your administrator or scheduler, your schedule will not be updated until the changes are approved. If your changes are not approved, you will know because your schedule is not updated.

My Availability

The My Availability feature (also known as “dynamic availability”) allows agents to indicate the days of the week and the hours of the day they are available to work. This information is then used like a

variable work shift to schedule agents within their availability to meet service needs, in conjunction with the agent's configured min/max hour condition.

Note: This feature cannot be used to schedule agents unless min/max hour conditions are configured and assigned to the agents. The page itself is available to agents as soon as a dynamic availability rule is assigned to them for a specific date range.

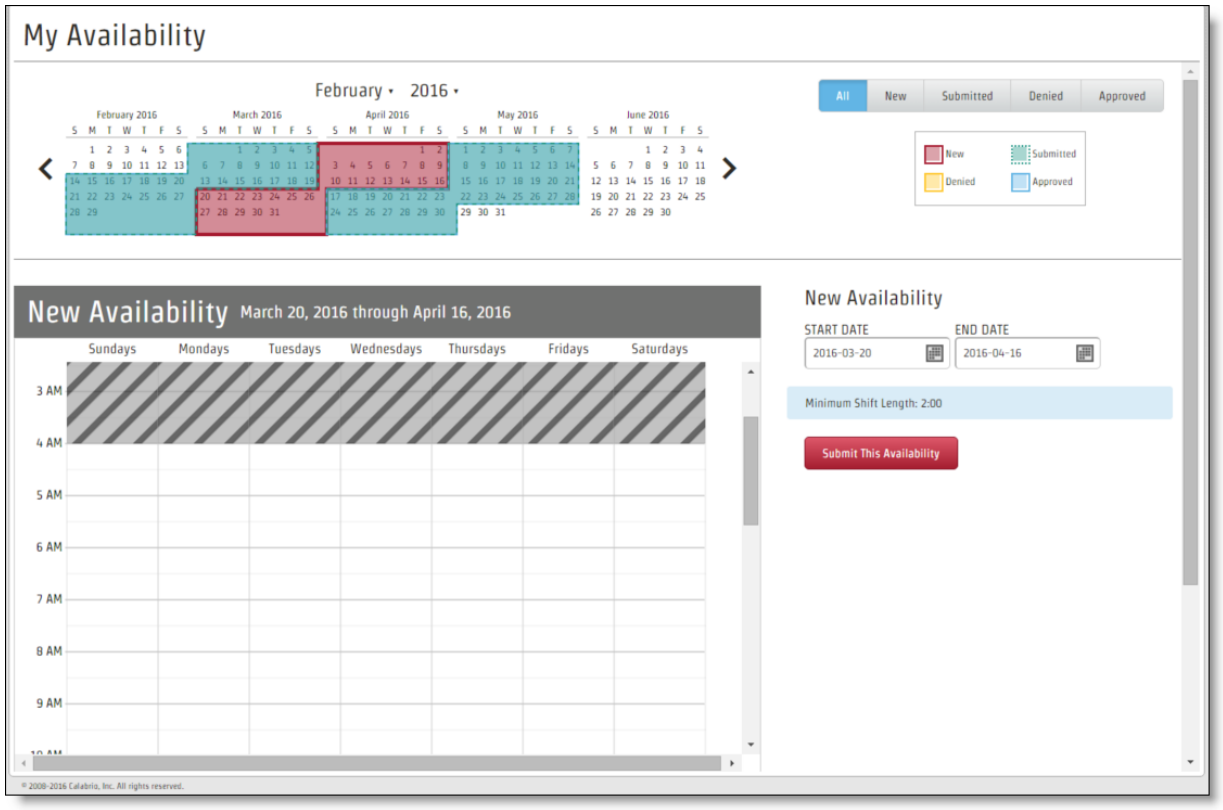
An administrator or scheduler creates a dynamic availability rule that specifies the parameters of the days and hours the agent can work and then assigns it to agents for a specific date range or for an indefinite period. The "My Availability" feature then becomes available to the agent under the Schedules and Planning icon.

Dynamic availability rules can be configured so that agent availability requests are approved automatically, as long as the request conforms to the rule parameters. Otherwise, availability requests must be approved by an administrator, scheduler, or supervisor to go into effect.

My Availability for Agents

When a dynamic availability rule is assigned to you, the My Availability option becomes visible under Schedules and Planning on the toolbar.

On the My Availability page, the weeks you must select your availability for are shaded in red (new availability) or yellow (denied availability). Click in the red area to display a chart showing the days of the week and the hours available to you for selection. Unavailable hours are shaded in gray. Restrictions in how you can choose your days and hours are noted to the right of the graphic. In the example below, the restriction "Minimum Shift Length: 2:00" is displayed in the light blue box.

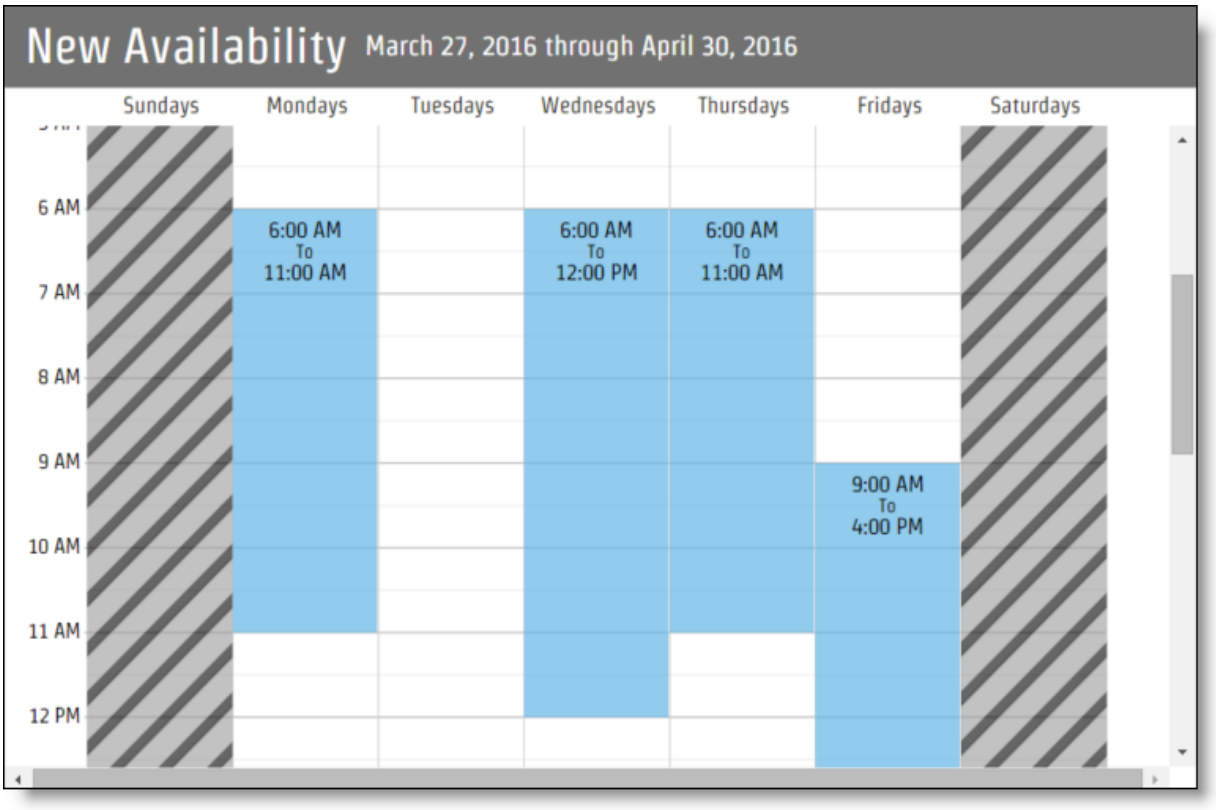


You do not have to configure the same availability for the entire period. You can configure different availabilities for subsets of the entire period by selecting start and end dates for the desired weeks. Availabilities always start on the first day of the week and end on the last day of the week; you cannot start or end an availability selection in the middle of a week.

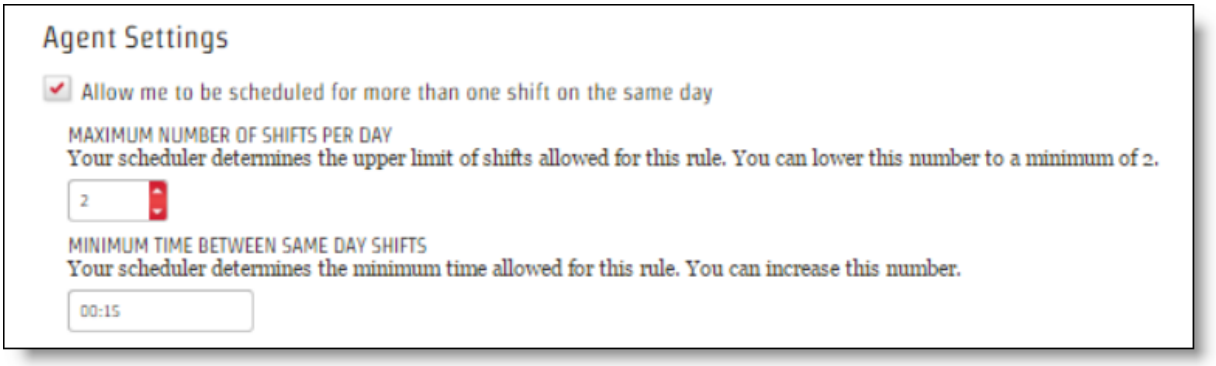
Note: You cannot select dates outside the date range in the original assignment.

Configure the days and hours you are available to work on the chart. Click on a day's column and then drag the ends of the resulting blue bar to your chosen start and end times. If there is a restriction, for example setting the minimum shift length to two hours, you cannot shorten the bar to less than two hours long.

The following graphic shows a chart with completed availability choices. This agent has opted to not work on Tuesdays for the weeks covered by this availability rule.



If the dynamic availability rule assigned to you allows for split shifts, the Agent Settings section appears. If you select the "Allow me to be scheduled for more than one shift on the same day" check box, you can then choose the maximum number of shifts per day (it must be less than or equal to what is configured in the rule) and the minimum time between same day shifts (it must be greater than or equal to what is configured in the rule).



You have the option to attach a comment to your availability request at any time. Type your comment in the "Leave a Comment" field and click Add Comment.

When you have finished selecting your availability, click Submit This Availability. In the calendar area, the weeks covered by your availability request turn from red to green to denote they were submitted. If they are approved, either automatically or by an administrator, scheduler, or supervisor, the weeks will turn blue. If they are denied, they will turn yellow.

In the event your availability is denied, you must resubmit a new availability selection. Check the comments attached to the page for information why your initial request was denied. In most cases, if you do not have your availability approved, you will not be scheduled to work.

You can go back at any time and edit or delete all or any subset of your submitted availability, even if it has been approved. If you edit your availability, you can change a subset of what you submitted earlier or the entire period.

Your submitted, approved, and denied availability requests (but not new requests) appear in your Messaging Out Box. You can track their status there, or view the status on your My Availability page.

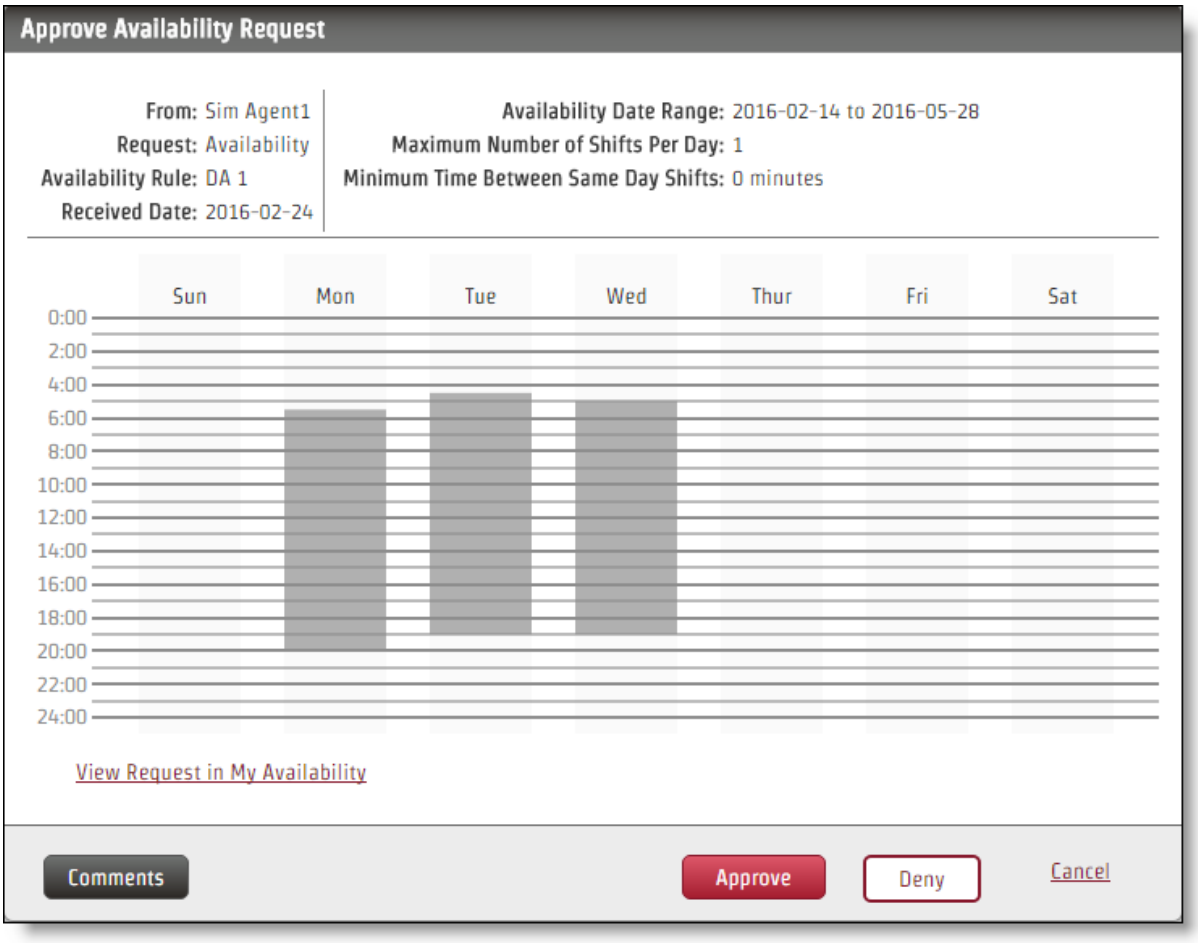
My Availability for Administrators, Schedulers, and Supervisors

Once agents have completed their availability selections, the dynamic availability request must be approved before it can be used in scheduling. If the dynamic availability rule is configured to allow for automatic approval, the request is approved if it meets the parameters of the rule. Since requests cannot be submitted successfully unless they do meet the rule parameters, they are always approved automatically.

If the dynamic availability rule is not configured for automatic approval, each request must be approved by an administrator, scheduler, or supervisor.

> **Note**: Supervisors can only approve or deny requests made by members on their teams. Supervisors who are also agents cannot approve their own requests.

You are notified of dynamic availability requests in your Messaging To-Do box if messaging alerts are enabled on the *Notifications* page. When a request is opened, a summary of the request is displayed.



You can approve or deny the request from this dialog box, or you can click the “View Request in My Availability” link to be redirected to the My Availability page with the agent selected and this request displayed.

You can then approve or deny the request from the My Availability page. You also have the option of editing the selections and then approving the changed request.

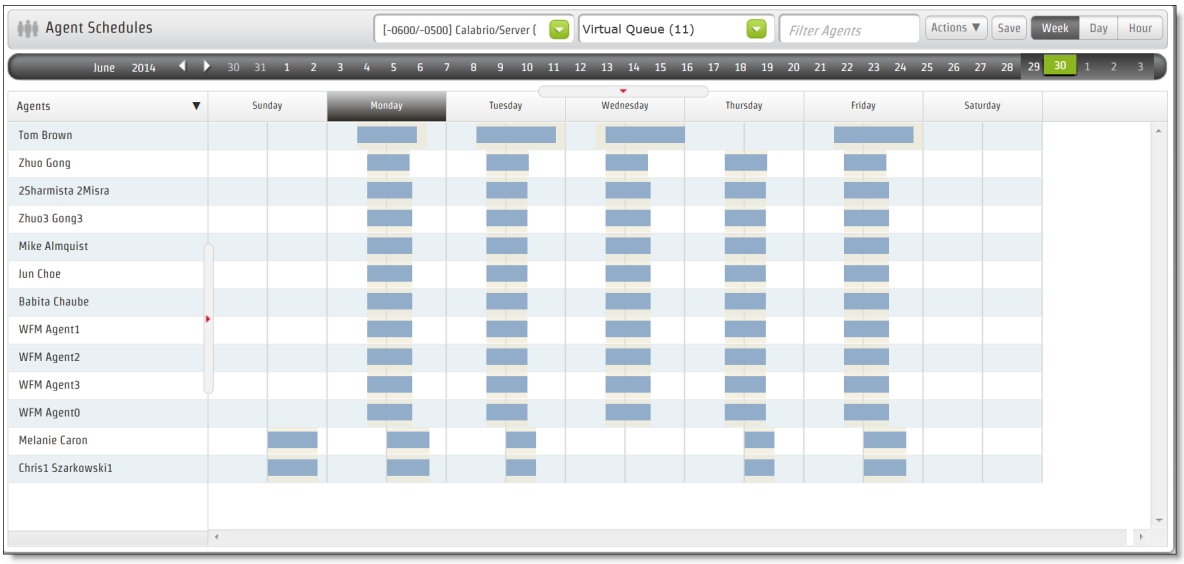
You can view an agent’s availability at any time by choosing My Availability from the Schedules and Planning menu and then selecting the agent. When that agent’s My Availability page is first displayed, it shows just the calendar bar with the shaded areas indicating the status of each dynamic availability rule assigned to the agent.

Click any of the shaded areas to display the details of the availability request. You have the option of approving, denying, or editing the selected availability, depending on its current status. The table below describes the actions you can take for each current status.

If current status is	You can:
New	Submit
Submitted	Approve, deny, edit
Approved	Deny, edit
Denied	Edit, approve

Agent Schedules

Agent Schedules allows supervisors, schedulers, and administrators to manage the schedule for selected agents by updating the production schedule.



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

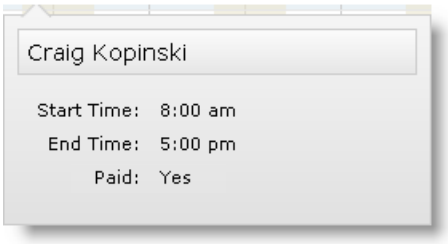
By default, Agent Schedules opens to today's date. You can quickly navigate to another date by clicking the month and year and choosing the desired period from the drop-down menu.

Use Agent Schedules to complete the following tasks.

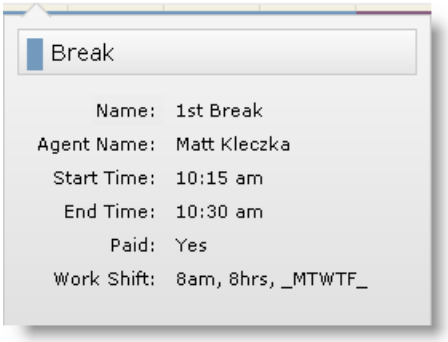
- Determine the optimal time to schedule an activity so that it has the least impact on the service level and insert the activity
- Trade schedules between agents
- Monitor real-time adherence and conformance and other performance statistics

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.

A popup appears when you hover over a schedule in the Agent Schedules page for the Day or Week option. The popup identifies the agent, the agent's start and end time, and if the agent is paid.



A popup appears when you hover over a scheduled activity in the Agent Schedules page for the Hour option. The popup identifies the activity, service queue, or multiskill group, the agent associated with the activity, service queue or multiskill group, the start and end time, whether or not the activity is paid, and the work shift.



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.

Agent Schedules Toolbar

The Agent Schedules toolbar controls which agents you see in the Agent Schedules page. Its fields and buttons are described in the table below.

Note: Until you select a service queue group, service queue, or team, the Agent Schedules page is blank.

When you pick a service queue, schedules are shown for the entire week. The schedules that appear are for agents who fit one or more of these criteria:

- They are in a team that is in your view
- They have at least one activity scheduled for the selected service queue and are working the queue
- They have schedules and are mapped to the selected service queue via skill mapping and can work the queue
- They have schedules and are mapped to the selected service queue via multiskill groups and can work the queue

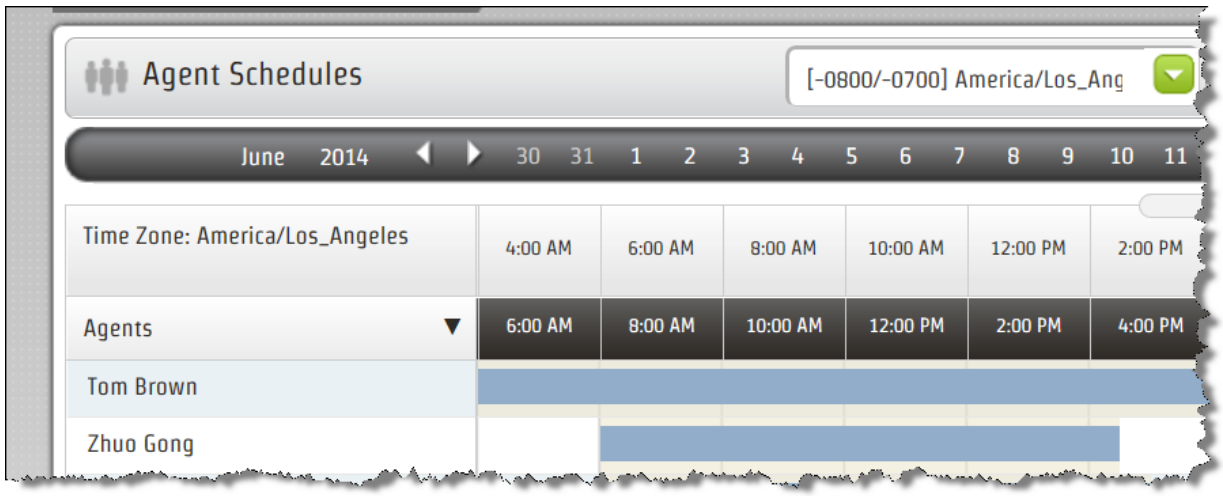
Field/Button	Description
Select Time zone	Choose your time zone preference from the drop-down list. The server's time zone appears in this field by default. When you change this value your selected time zone appears in the Time Zone row. The server's time zone appears in the Agents row.
Select Criteria	Choose the service queue group, service queue, or team to display those agents' schedules. To see agents who are scheduled for a multiskill group, select the service queues associated with the multiskill group or the agent's team. You can type all or part of the 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.
Actions	This button allows you to modify agents' schedules by inserting activities and trading schedules. It also can take you to today's schedule in one click and discard any changes you made but have not yet saved, and find an optimal time for an activity you want to insert.

Field/Button	Description
Save	This button saves the changes to the database and updates the production schedule.
Paging	The paging tool allows you to navigate through a long list of agents on multiple pages. Click the double arrows to navigate to the first or last page. Click the single arrows to move forward or backward one page at a time. Agents you pin to the top of the list remain there when you go to another page. Filters apply only to the page you are currently viewing.
Week/Day/Hour	These buttons enables you to display the agent schedules by week, day, or hour. Changes to the date and view persist from session to session.

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.

Example: The time zone row in the schedule grid below shows that the America/Los Angeles time zone has been selected. As a result, a row labeled with the time zone name has been added to the top of the schedule grid, which shows schedule times in the server time zone. The added time zone row is the only place where times in the selected time zone are displayed. Everywhere else in the schedule, the server time zone is used.



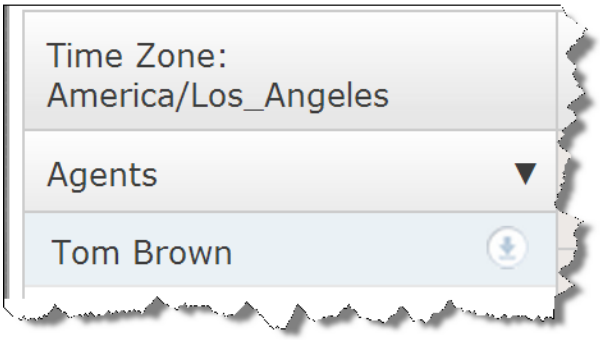
Sorting the List of Agents

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 last name and first 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 as assigned on the Agents page. 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, no matter how many pages of agents there are. You can pin multiple agents, and the one most recently pinned is at the top.

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 below). To unpin the agent, click the icon again and the agent is immediately subject to the sorting method used in the list of agents.



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, the schedule bar splits in two. General time, such as In Service time, becomes the bottom bar, and specific time, such as exceptions and breaks, becomes the top bar.

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

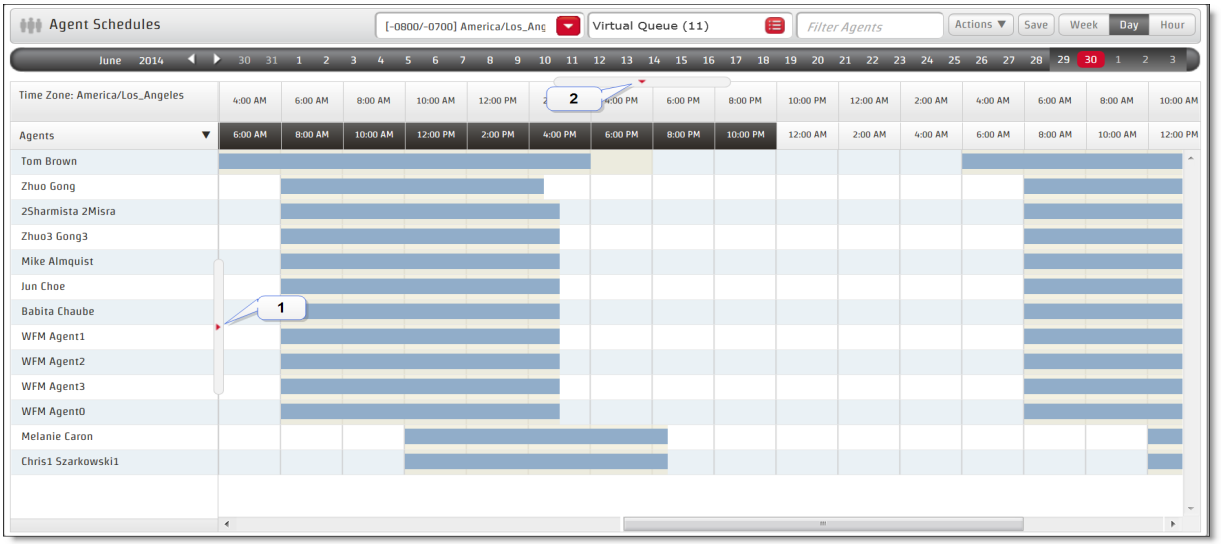
Note: A dynamic scheduling event exception that is outside of the agent's In Service time cannot be moved.

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.

Note: A popup dialog box appears after you click Save if you violate min/max hour conditions. The dialog box displays the violations and gives you the option of saving the changes despite the violations.

Drawers

A drawer is a pane that is opened and closed by clicking a control in the Agent Schedules page.



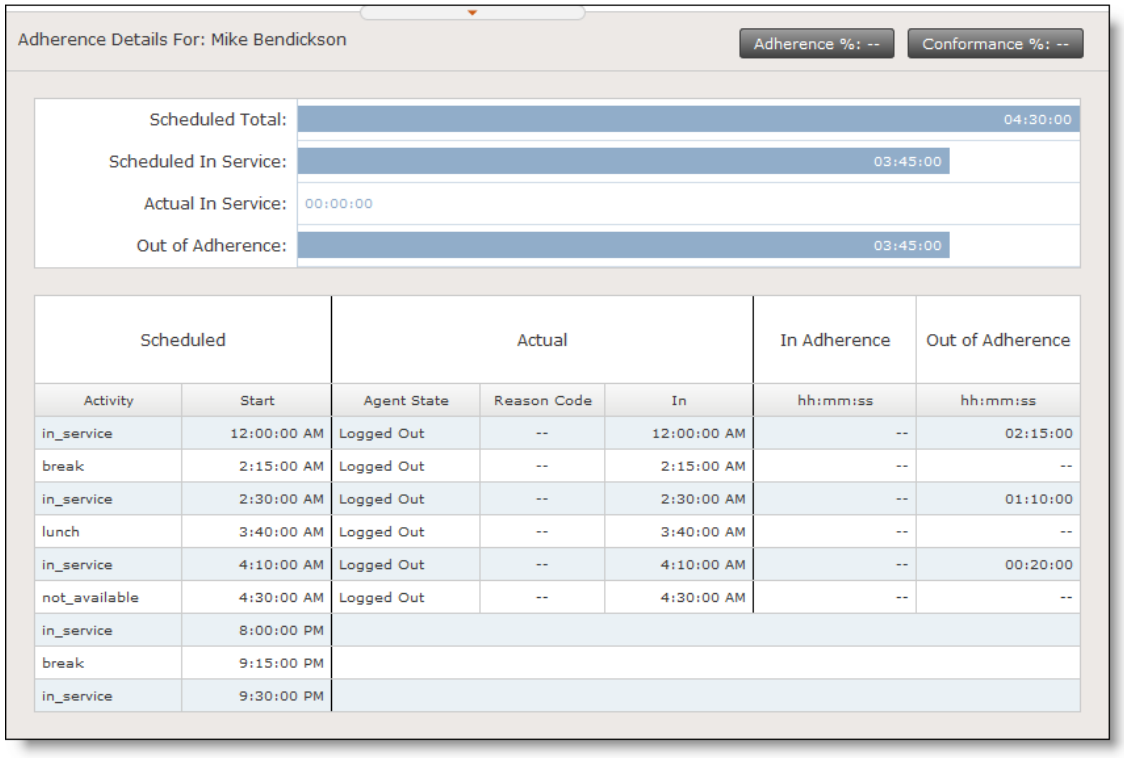
There are three drawers available:

- *Adherence Details Drawer*, displayed by clicking an agent's name in the Agents list
- *Adherence Drawer*, displayed by clicking the arrow control (number 1 in the figure) to the right of the Agents list
- *Coverage Drawer*, displayed by clicking the arrow control (number 2 in the figure) below the calendar bar

> **Note:** The Coverage drawer is available only when the agent schedules are filtered by service queue or service queue group.

Adherence Details Drawer

The Adherence Details drawer 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, Actual 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

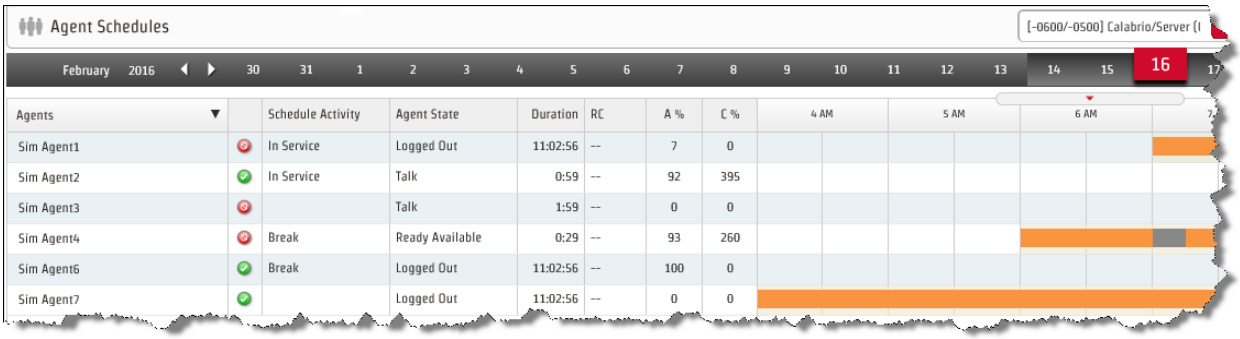
The following table describes the Adherence Details drawer fields.

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.

Column	Description
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 except for the adherence and conformance percentages, which are updated every 15 minutes.



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 15 minutes 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.

The following table lists the fields in the Adherence drawer.

Field	Description
Agents	The agent's name.
Red or green ball	A green ball indicates that the agent is in adherence. A red ball indicates that the agent is out of adherence.
Schedule Activity	The agent's current scheduled activity.
Agent State	The agent's ACD agent state.
Duration	The agent's duration in the Agent State, in hours, minutes, and seconds.
RC	The reason code (if any) associated with the agent's ACD state.

Field	Description
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 – minutes not in adherence) ÷ configured schedule adherence minutes] × 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 16:00 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) ÷ (total current scheduled inservice time) ×100 In service time does not include lunch, breaks, projects, or exceptions.

Coverage Drawer

The Coverage drawer is opened and closed by clicking the arrow control below the calendar bar.

The Coverage drawer has four views:

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

Note: The Coverage: Reforecast view and Intraday: Data view are available only when the agent schedules are filtered by individual service queues. They are not available when the agent schedules are filtered by service queue groups.

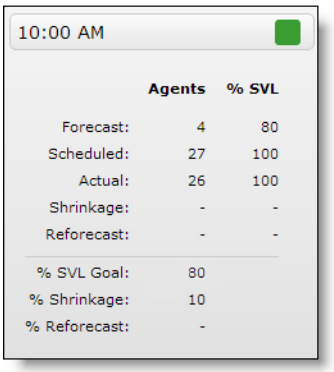
You can use the Coverage drawer to see how WFM predicts what the service queue will do for each day and interval. It shows you if your forecast is accurate when compared to the production schedule, and allows you to make post-production schedule changes.

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.

A popup appears when you click a bar in any of the coverage drawers.



The information in the popup is detailed in the following table.

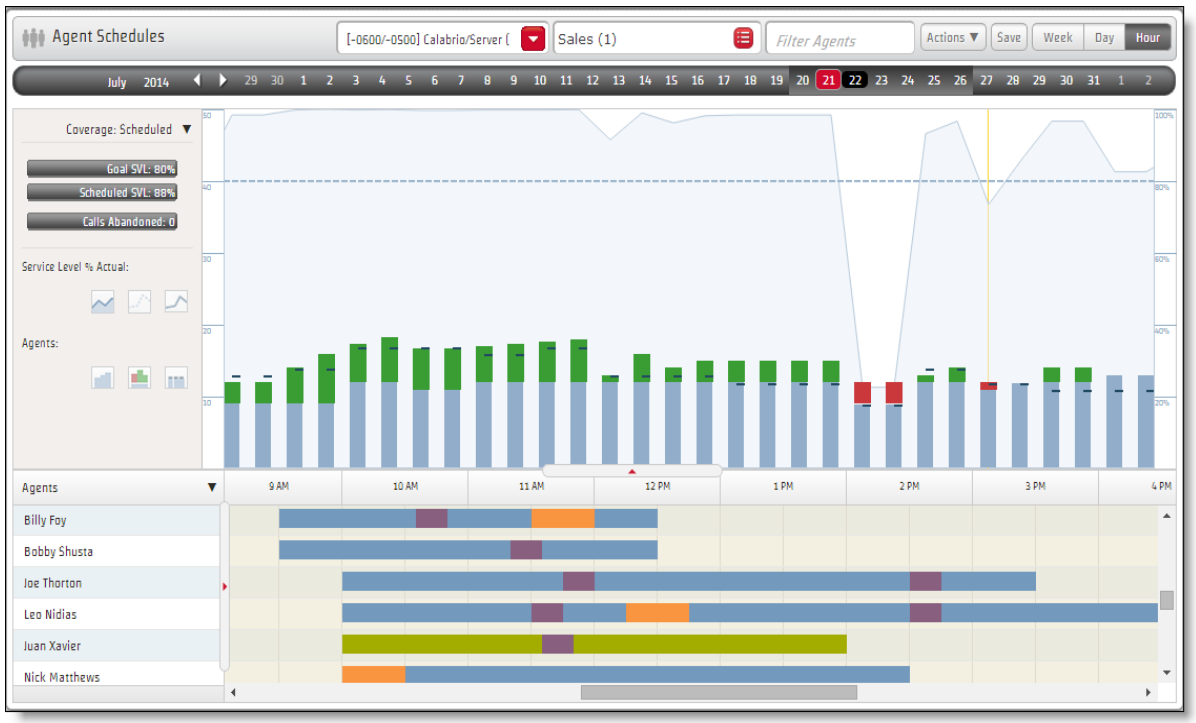
Note: Interactive service queues will display information in both the Agents and % SVL columns. Non-interactive service queues, as well as any service queue groups, will display information only in the Agents column.

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. This number does not include inactive agents or agents who have been terminated but who are still in the schedule. **Note**: If an agent is scheduled for a multiskill group, the agent will contribute the service queue weight to the number of scheduled agents. For example, if the service queue has a weight of 30% in the multiskill group, an agent scheduled for the multiskill group will contribute 0.3 scheduled agents for that service queue.
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

Field	Description
% Reforecast	The reforecast service level percentage. **Note**: The reforecast service level computation is made based on the actual service level through the latest completed interval, and then based on the reforecasted interval service level. These values are weighted based on the actual contacts offered through the latest completed actual interval and then based on the reforecasted contacts offered for the remaining intervals for the day.

Coverage: Scheduled View

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



You can choose to display any or all of following metrics using the appropriate buttons on the left.

Metric Section	Available Metrics
Service Level % Actual (Interactive individual service queues only)	Service Level % Scheduled Service Level % Goal Service Level % Actual
Queues (Non-interactive individual service queues only)	Maximum Contacts in Queue
Agents (All individual service queues and service queue groups)	Agents Scheduled Agents Forecast Agents Actual

For interactive service queues, the left panel also displays the following metrics for the selected time period:

- Goal SVL %
- Scheduled SVL %
- Calls Abandoned

Interpreting the Chart

The Coverage: Scheduled view chart displays a stacked bar graph for a specific day. The bars are color-coded to aid in interpretation. Each bar represents a 15-minute interval on the day and hour views, and a 60-minute interval on the week view.

The following table describes the colors used in the stacked bar for each interval.

Bar Color	Agents Scheduled
Light blue	Number of agents scheduled.
Dark blue	Actual number of agents.
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 coverage. 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.

The following table describes the lines used to represent the different service levels (interactive service queues) or queue (non-interactive service queues) metrics.

For interactive service queues, 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.

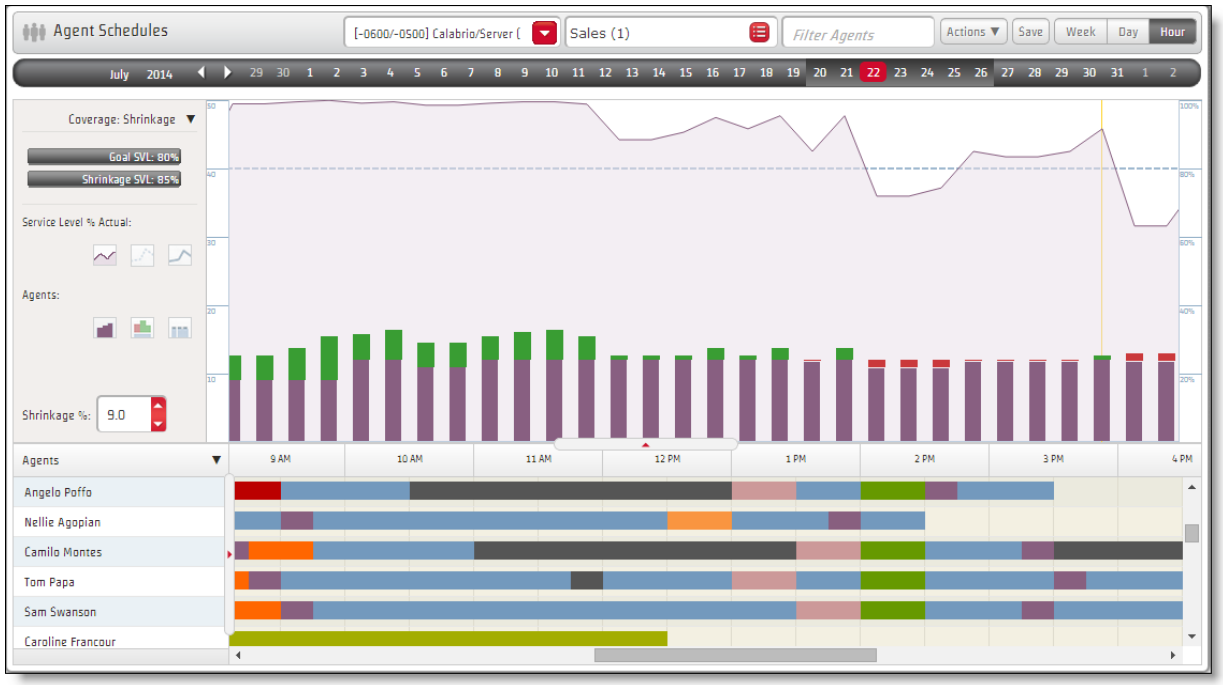
For non-interactive service queues, the chart displays the actual maximum contacts in queue.

Line Color	Service Level
Light blue	Service Level % Scheduled (interactive service queues) Maximum Contacts in Queue (non-interactive service queues)
Dashed blue	Service Level % Goal
Dark blue	Service Level % Actual

Note: The line graph representing service levels or queue metrics is available only for individual service queues, not service queue groups.

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.



You can choose to display any or all of following metrics using the appropriate buttons on the left.

Metric Section	Available Metrics
Service Level % Actual (Interactive individual service queues only)	Service Level % Shrinkage Service Level % Goal Service Level % Actual
Queues (Non-interactive individual service queues only)	Maximum Contacts in Queue
Agents (All individual service queues and service queue groups)	Agents Shrinkage Agents Forecast Agents Actual

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:

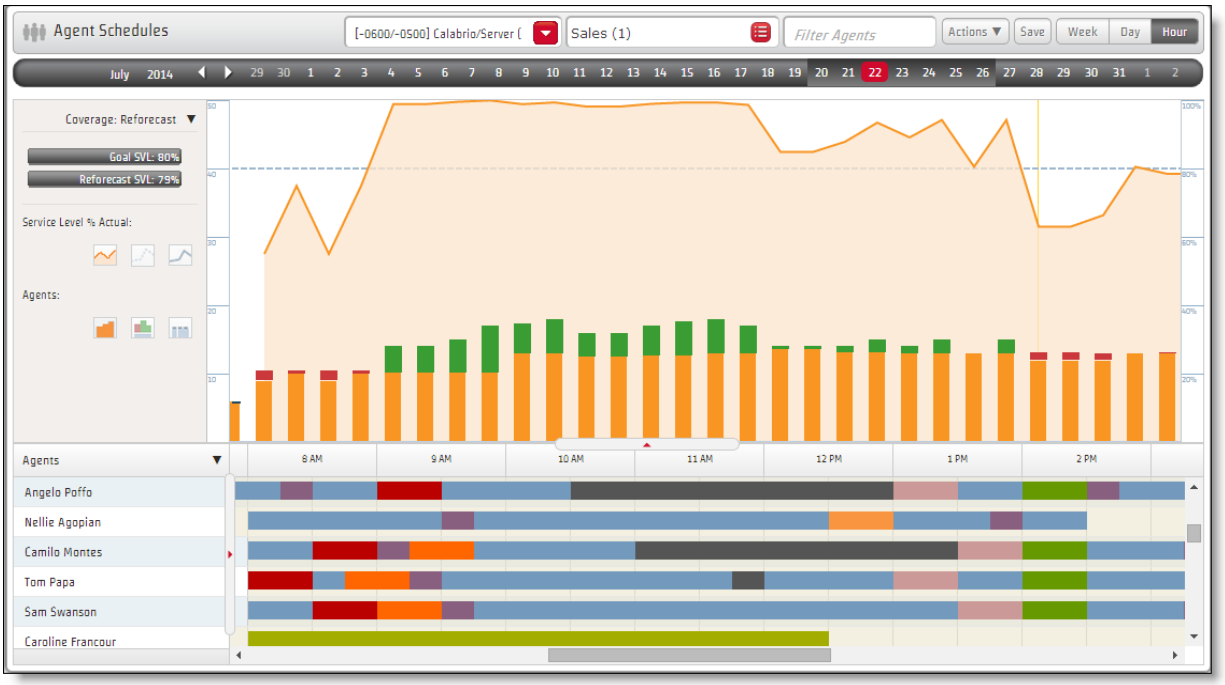
1. In the Shrinkage % field, use the up and down arrows to change the shrinkage percentage to a new value.
2. Click anywhere in the chart to apply the new shrinkage percentage to each interval. The chart updates to reflect the new shrinkage percentage.

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 is available for individual service queues only. It 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.

Note: The zoom level must be set to Hour in order to display the Reforecast view.



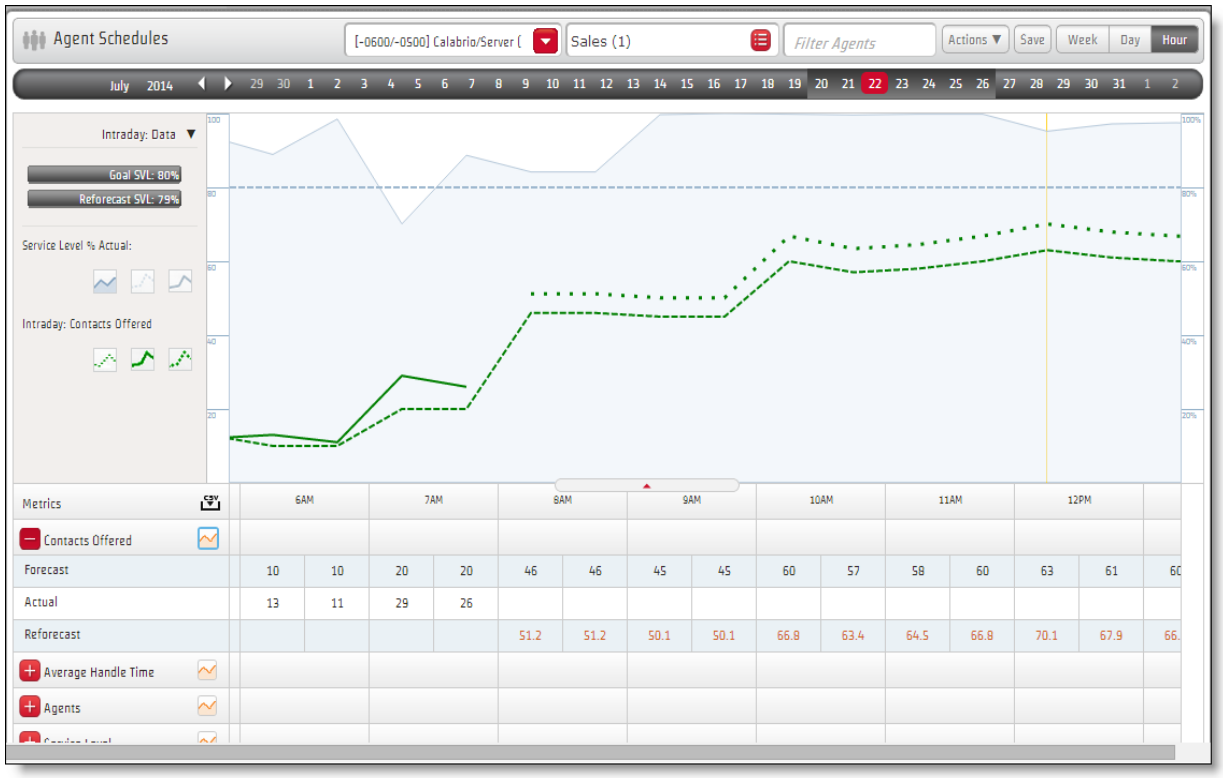
You can choose to display any or all of following metrics using the appropriate buttons on the left.

Metric Section	Available Metrics
Service Level % Actual (Interactive service queues only)	Service Level Reforecast Service Level % Goal Service Level % Actual
Queues (Non-interactive service queues only)	Maximum Contacts in Queue
Agents (All service queues)	Agents Scheduled Agents Reforecast Agents Actual

Intraday: Data View

The Intraday: Data view is available for individual service queues only. It shows actual data compared to forecast data in chart form.

Note: The zoom level must be set to Hour in order to display the Intraday: Data view.



You can choose to display any or all of following metrics using the appropriate buttons on the left.

- 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 (Interactive service queues only; available when the Show in Graph button on the Service Level drawer is clicked)
- Maximum Contacts in Queue—Actual (Non-interactive service queues only; available when the Show in Graph button on the Maximum Contacts in Queue drawer is clicked)

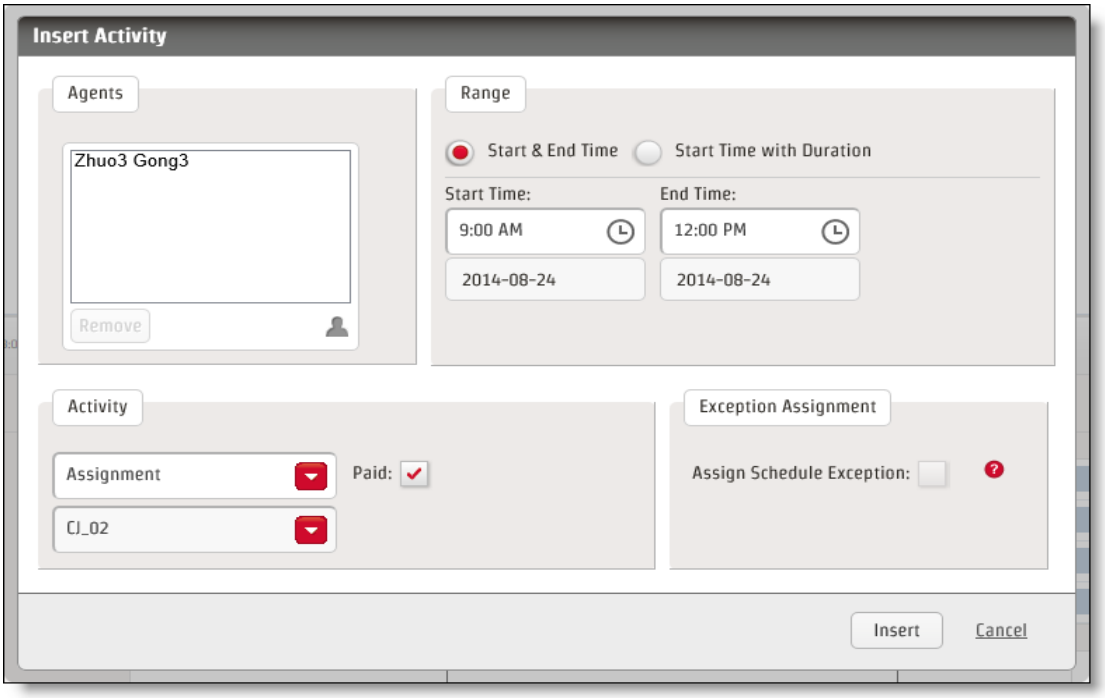
The data used to create the chart is provided in tabular form in drawers at the bottom of the chart. The tabular drawers show the following metrics for 30-minute intervals:

- 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; interactive service queues only)
- Maximum Contacts in Queue (Actual; non-interactive service queues only)

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 allows you to add an activity to the agents' schedules.



The following table describes the fields in the Insert Activity dialog box.

Field	Description
Agents	The agents involved in this activity. Click the Agent Selection field to choose one or more agents from the list. Only agents who are assigned to the team in your Main View appear in this list.

Field	Description
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.
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.
Search Criteria	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, or team should be displayed.

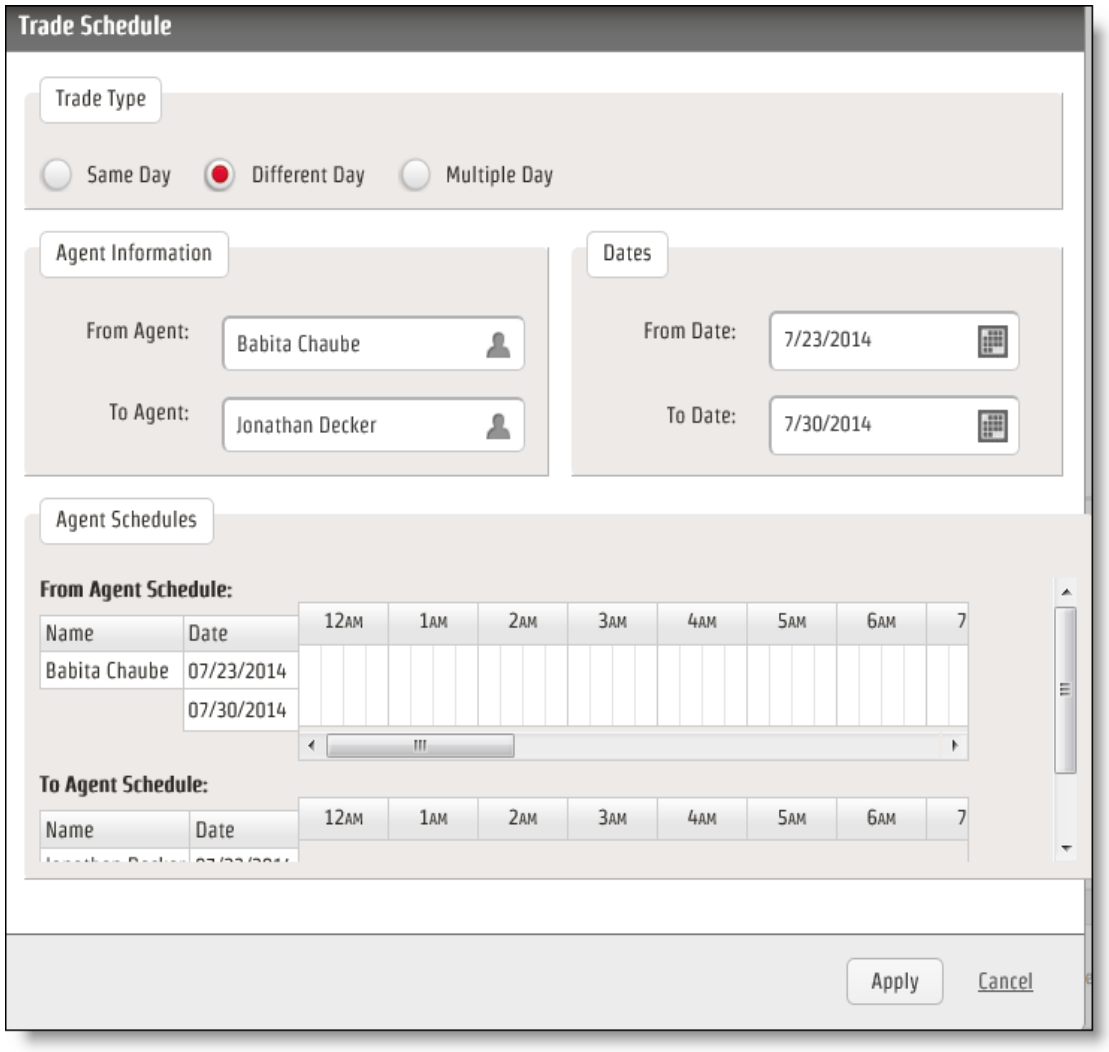
To insert an activity:

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.

   Note: If the activity you want to insert is partially outside of the week you are editing, it must be inserted in two parts, one for the current week and one for the following week.
3. Click Save to save the schedule change.

Trade Schedule

The Trade Schedule dialog box 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.

The following table describes the fields in the Trade Schedule dialog box.

Field	Description
Trade Type	The type of trade for this action. Your 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 two days. When you choose this option, the From Date and To Date fields appear. This option works exactly as the Same Day option does, only on two separate days. For example, if you choose 1/23/2012 in the From Date field and 1/25/2012 in the To Date field, Agent A's Monday (23rd) and Wednesday (25th) schedules are traded with Agent B's Monday and Wednesday schedules. • Multiple Days–trade multiple day schedules. When you choose this option, the Start Date and End Date fields appear. For example, if you choose 1/23/2012 in the Start Date field and 1/27/2012 in the End Date field, 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.

Field	Description
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 You are provided with information about the To Agent's availability, teams, time zone, exceptions, service queue, overlapping shifts, and skill mapping to help you decide if the trade is feasible.

Trading Schedules Between Agents

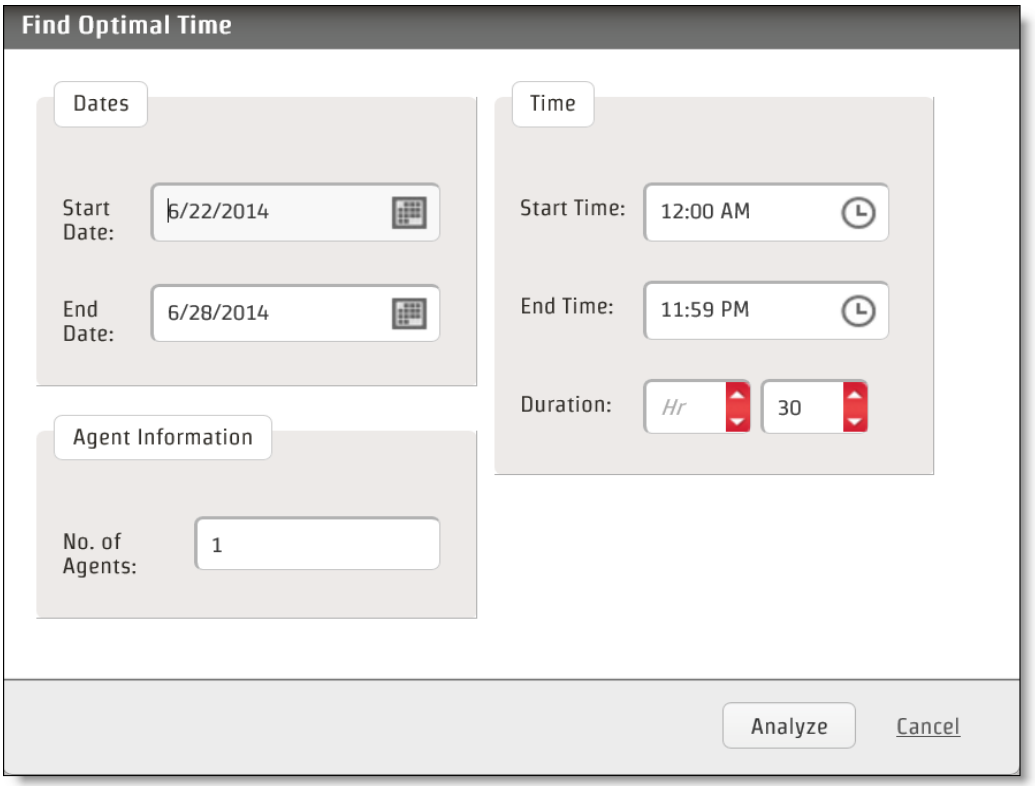
To trade schedules between two agents:

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.

Note: Both agents must be included in a schedule that was run for the trade's time frame in order to trade schedules.

Find Optimal Time

The Find Optimal Time dialog box helps you find the best time in the agent schedule to insert an activity so that it has as little impact on the service level as possible.

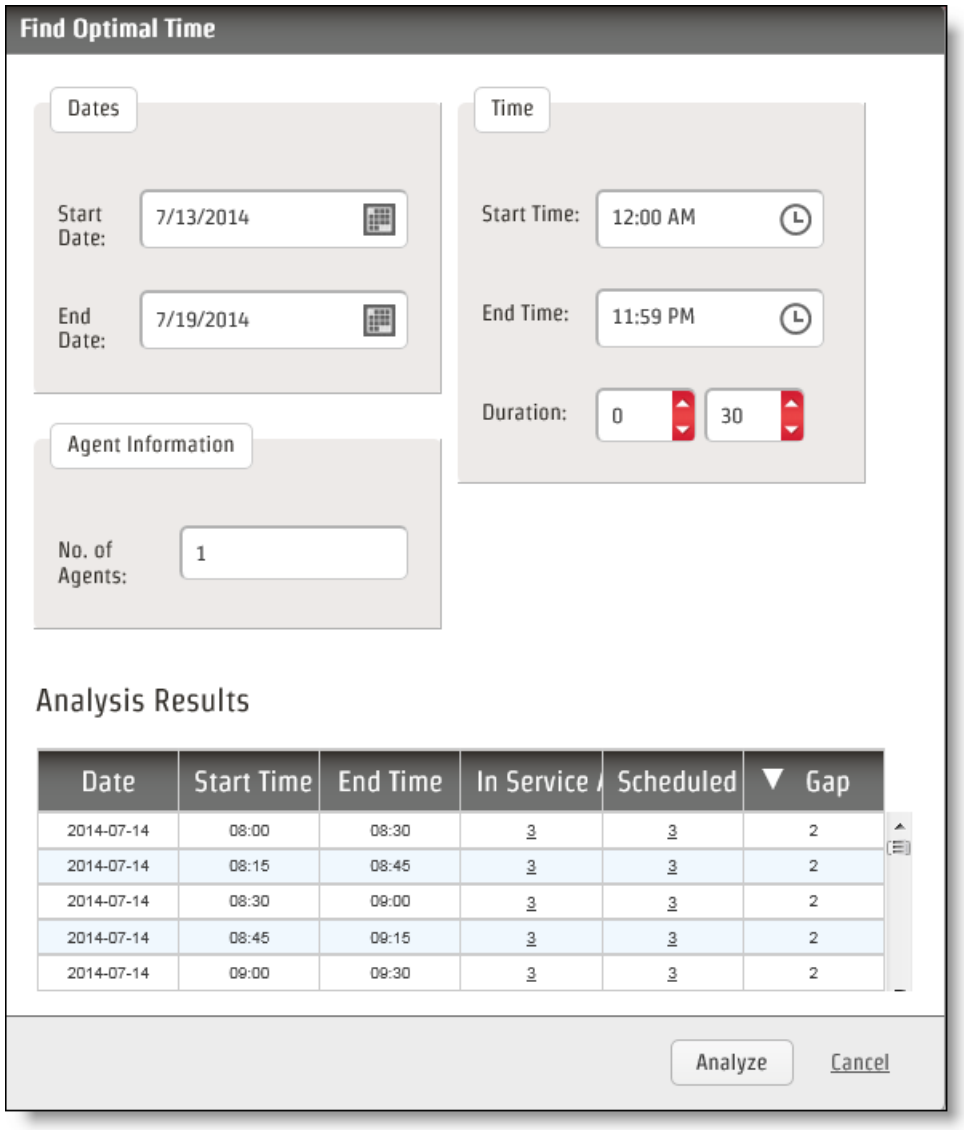


The following table describes the fields in the Find Optimal Time dialog box.

Field	Description
Start Date	Enter the start date of the date range in which the activity should take place. By default this is the first day of the week whose schedule you are viewing. You can choose a date within this week.
End Date	Enter the end date of the date range in which the activity should take place. By default this is the end of the week whose schedule you are viewing. You can choose any date within the week.
Start Time	The earliest time at which the activity can start.
End Time	The latest time at which the activity can start.
Duration	The amount of time the activity is expected to take.
No. of Agents	The number of agents you want to perform the activity.

Finding an Optimal Time

After completing the fields in the Find Optimal Time dialog box, click Analyze. WFM finds the best times for the activity and lists them in the Analysis Results flyout.



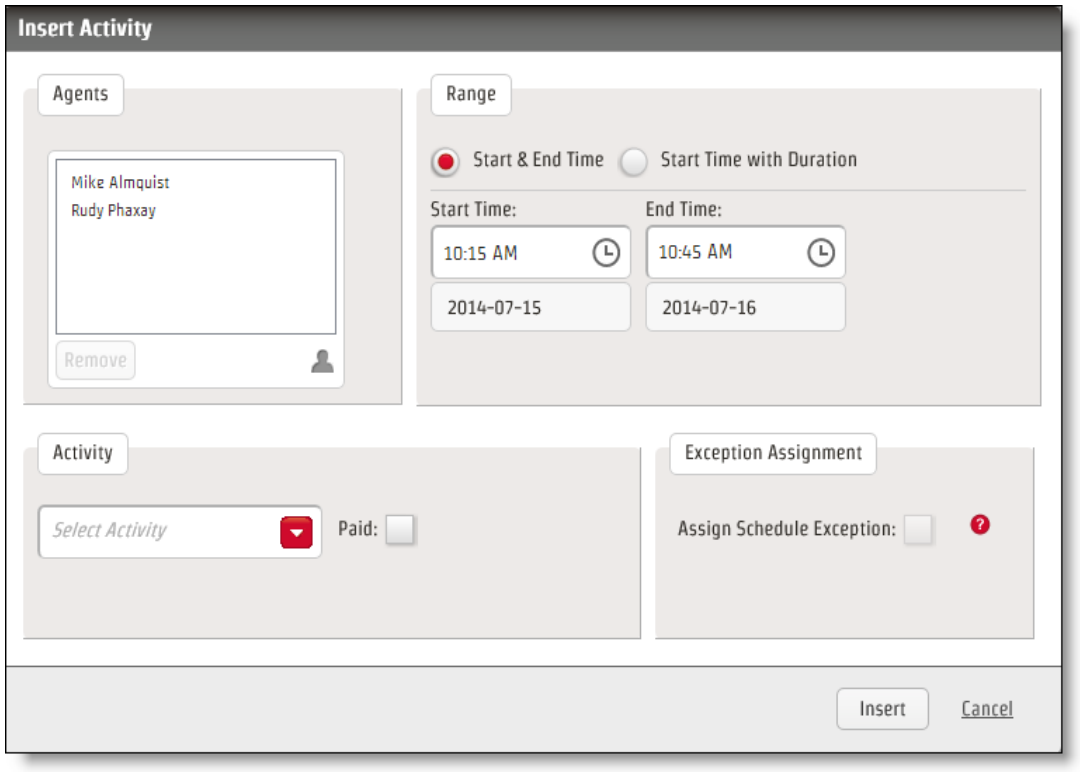
The Analysis Results table lists candidate time slots for the activity. The fields in the table are the following:

Field	Description
Date	Date of the time slot.

Field	Description
Start Time	Start time of the time slot.
End Time	End time of the time slot.
In Service Agents	The number of agents who are in service the entire duration of the time slot, including agents who are in service or performing overtime for a service queue/multiskill group. This does not include agents who are scheduled for a closed service/multiskill group activity.
Scheduled	The number of agents who are scheduled during the time slot for any activity, including breaks or scheduled for a closed service/multiskill group. This number does not include inactive agents or agents who have been terminated but who are still in the schedule.
Gap	The positive or negative gap between the number of forecasted agents and actual scheduled agents taking into account the requested agents number. A positive number indicates overstaffing after adjustment for the requested number of agents, and a negative number indicates understaffing after adjustment for the requested number of agents.

Use the gap value to help you decide which time slot to use for the activity.

Once you decide, click the hyperlinked number in the In Service Agents or Scheduled Agents fields in your selected time slot. This opens the *Insert Activity* dialog box with the Range fields autofilled based on your time slot selection.



The names of the agents who were the In Service Agents or Scheduled in the Analysis Results table are listed in the Agents pane. Select the agents you want to perform the activity, complete the Exception Assignment and Activity sections, and click Insert and then Save to add the activity to those agents' schedules.

Optimize Lunches and Breaks

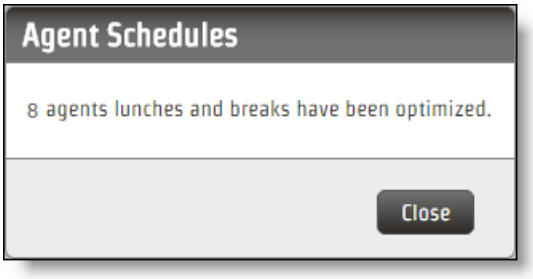
The Optimize Lunches and Breaks action allows you to maximize coverage without running a new schedule. It is possible that a number of things have changed since the schedule was run (exceptions added, agents take time off, and so on) that affect coverage. Optimizing lunches and breaks helps to compensate for this.

The optimization is done on the schedules of the active agents in your main view for the selected date. Agents not in your main view, but scheduled for the service queue, will not be optimized, but they are included in the optimization coverage evaluation.

This action is only available for current and future dates when a service queue is selected and there is at least one agent scheduled. It is not available if you select a service queue group or team.

Agents are optimized in the order that they appear in Agent Schedules. You can change this order by using the Agent column drop-down menu for sorting or by pinning agents to the top of the list. Optimization affects all agents across multiple pages, not just on the visible page.

WFM displays a notification while the optimizer is running, and when optimization is complete, how many agents' lunches and breaks were optimized.



When you click **Close**, the system updates the current page for any agent whose lunches and breaks were optimized. The changed agent schedules are not saved until you click **Save**.

Note: You can optimize the schedule multiple times to try to reach total optimization (the result message tells you that 0 agent lunches and breaks were optimized) but this takes time and system resources. It is recommended that you limit running optimization to a small number of passes. Often just one pass gives satisfactory results.

Schedules for the agents that were optimized are expanded into two entries for that date, as if you had double-clicked that agent's schedule. If you select a different date in the schedule week, in which the agent is not optimized, the agent's schedule is not expanded. Clicking back to the date that was optimized causes the agent's schedule to be expanded again. The two-entry schedule expansion for the agent on a date is maintained until:

- Another optimization is done on specified date
- The page is refreshed
- You double-click the agent schedule
- The schedule is saved or discarded

The two-entry schedule expansion applies across multiple pages.

Example: An agent schedule has five pages, but you have only viewed page one before optimizing it. This optimizes agents in pages one and four. When you view page four, the agents optimized there have two-entry schedule expansions. If you manually expanded an agent schedule into two entries before you ran the optimizer, and that agent's schedule was not optimized, the agent's schedule will be collapsed back to one-layer to indicate that it was not optimized.

You can make additional changes to the optimized schedules (double-click to bring up the two-entry schedule expansion). You can run the optimizer multiple times on the same date without saving, and

run the optimizer on multiple dates in the same schedule week without saving between each date optimized.

You cannot select specific agents for the selected service queue/date to optimize; you either have to save or discard all the optimized schedules for the agents. You cannot select specific optimized agent schedules to save.

Intraday Lunch and Break Optimization

To be eligible to be included in intraday lunch and break optimization, an agent must be:

- Active
- Employed on the specified date
- Included in the user's view (that is, the agent must belong to a team in the user's main view)

Optimization will affect only work condition activities (lunches and breaks) in work shifts that have scheduled activities for the selected service queue or multiskill group that includes the selected service queue for the selected date.

Note: This can result in worse coverage for other service queues that the agent is scheduled for on that date.

For each existing work condition activity in the shift, the optimizer will only move those within their constraints and maximum optimization adjustment field limits (if they are set), for both paid hours and shift length work conditions currently in the agent's work shifts.

Note: The optimizer will not move breaks and lunches added via Agent Schedules > Insert Activity.

Limitations on Intraday Lunch and Break Optimization

The optimizer uses these work condition activity constraints to move activities:

- Minumum delay
- Maximum delay
- Minimum interval
- Increment
- Maximum optimization adjustment field limit (if one is set) (refer to Work Condition Profiles).

The work condition activity will not be moved if these constraints cannot be met, or if:

- The location to which the work condition activity could be moved is currently occupied by another work condition activity, project, or exception.
- The work condition activity crosses midnight.

You can perform both current day and future intraday lunch and break optimization the same way; however, to optimize current date schedules, work condition activities must begin at least one hour from the current time (rounded up to the nearest five minutes), and there must be at least ten minutes available before the end of potential lunch or work breaks. Manual changes are always allowed.

If the constraint for the activity has changed such that the activity cannot be moved in future time, it will not be moved.

The optimizer will not add or delete work condition activities, or change the following work condition activity attributes:

- Name
- Type
- Duration
- Paid portion duration
- Color

The optimizer will not move work condition activities on top of existing exceptions, projects, and work condition activities. It will not move work condition activities to be partially under the existing exceptions, projects, and work condition activities. If a work condition activity has both a paid and an unpaid portion, the optimizer will not attempt to swap which appears in the non overlap portion; it always places the paid portion before the unpaid portion.

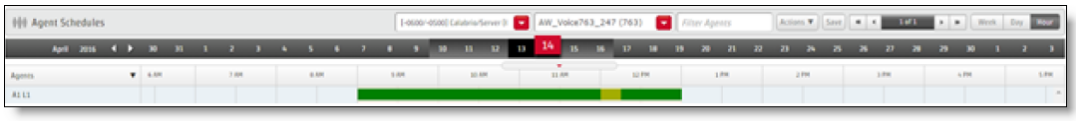
Intraday Lunch and Break Optimization Examples

Example 1: Break Manually Moved by Administrator in Single Shift, Maximum Optimization Adjustment Not Set

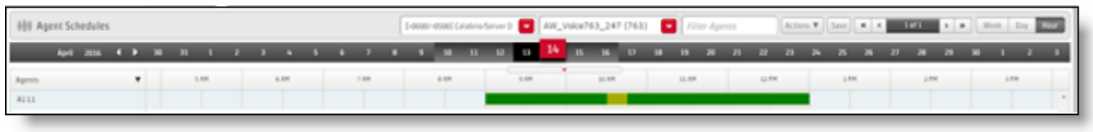
An agent has a four hour shift (9:00 am to 1:00 pm) with one break (10:30 am), and you move the break to 12:00 pm. The break has a one-hour minimum delay, a two-hour maximum delay, in a four-hour paid hours work condition.

Name	Type	Min Delay	Max Delay	Duration	Increment	Min Interval	Paid Portion	Color	Color ID
4Hr_1Br1HrMin2HrMax_Break	Break	01:00	02:00	00:15	5	00:00	00:15		#A3AD00

After you make the manual change:



After optimizing lunches and breaks: The break is moved to between 10:00 — 11:00 am.

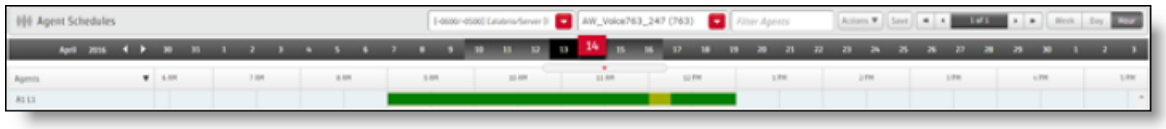


Example 2: Break Manually Moved by Administrator in Single Shift, Maximum Optimization Adjustment Set

An agent has a four hour shift (9:00 am to 1:00 pm) with one break (10:30 am), and you move the to 12:00 pm. The break has a one hour minimum delay, a two hour maximum delay, in a four hour shift length work condition with a 15-minute maximum optimization adjustment.

Name	Type	Min Delay	Max Delay	Duration	Increment	Min Interval	Paid Portion	Color	Color ID
4Hr_1Br1HrMin2HrMax_Break	Break	01:00	02:00	00:15	5	00:00	00:15		#A3AD00

After you make the manual change:



After optimizing lunches and breaks: There is no change to the agent schedule.

Example 3: Fixed Work Shift Adjacent to Overtime Shift

An agent has a four-hour fixed work shift from 9:00 am to 1:00 pm, with one break (we'll call it "A", at 10:30 am, which was created by the Schedule service). This shift is adjacent to a four-hour overtime work shift from 1:00 pm to 5:00 pm, with one break (we'll call it "B", at 2:30 pm, which was created by IDS). Break "A" has a one-hour minimum delay, a two-hour maximum delay, in a four-hour paid hours work condition "C". Break "B"' has a one-hour minimum delay, a two-hour maximum delay, in a four-hour shift length work condition "D".

Name	Type	Min Delay	Max Delay	Duration	Increment	Min Interval	Paid Portion	Color	Color ID
4Hr_1Br1HrMin2HrMax_Break	Break	01:00	02:00	00:15	5	00:00	00:15		#A3AD00

Name	Type	Min Delay	Max Delay	Duration	Increment	Min Interval	Paid Portion	Color	Color ID
4Hr_1Br1HrMin2HrMax_Break2	Break	01:00	02:00	00:15	5	00:00	00:15		#A3AD00

After optimizing lunches and breaks: The breaks are separately optimized in the fixed work shift and the IDS overtime shift.

Example 4: Break Configuration Changed by Administrator in Single Shift, Maximum Optimization Adjustment Not Set

An agent has a four-hour shift (9:00 am to 1:00 pm) with one break (10:30 am). The original break configuration has a one-hour minimum delay, a two-hour maximum delay, in a four-hour paid hours work condition. you change the break configuration in that work condition to a 2.5-hour minimum delay, and a three-hour maximum delay.

Original break configuration:

Name	Type	Min Delay	Max Delay	Duration	Increment	Min Interval	Paid Portion	Color	Color ID
4Hr_1Br1HrMin2HrMax_Break	Break	01:00	02:00	00:15	15	00:00	00:15		#A3AD00

New break configuration:

Name	Type	Min Delay	Max Delay	Duration	Increment	Min Interval	Paid Portion	Color	Color ID
4Hr_1Br1HrMin2HrMax_Break	Break	02:30	03:00	00:20	20	00:00	00:20		#0099FF

Agent schedule before you optimize the lunches and breaks:

After optimizing lunches and breaks: The break is moved to between 11:30 am — 12:00 pm.

Example 5: Break Configuration Changed by Administrator in Single Shift, Maximum Optimization Adjustment Set

An agent has a four-hour shift (9:00 am to 1:00 pm) with one break (10:30 am). The original break configuration had a one-hour minimum delay and a two-hour maximum delay, in a four-hour paid hours work condition. The work condition has a 15-minute maximum optimization adjustment. You change the break configuration in that work condition to a 2.5-hour minimum delay, and a three-hour maximum delay.

Original break configuration:

Name	Type	Min Delay	Max Delay	Duration	Increment	Min Interval	Paid Portion	Color	Color ID
4Hr_1Br1HrMin2HrMax_Break	Break	01:00	02:00	00:15	15	00:00	00:15		#A3AD00

New break configuration:

Name	Type	Min Delay	Max Delay	Duration	Increment	Min Interval	Paid Portion	Color	Color ID
4Hr_1Br1HrMin2HrMax_Break	Break	02:30	03:00	00:20	20	00:00	00:20		#0099FF

Agent schedule before optimization of lunches and breaks:

After optimizing lunches and breaks: No change.

Planning

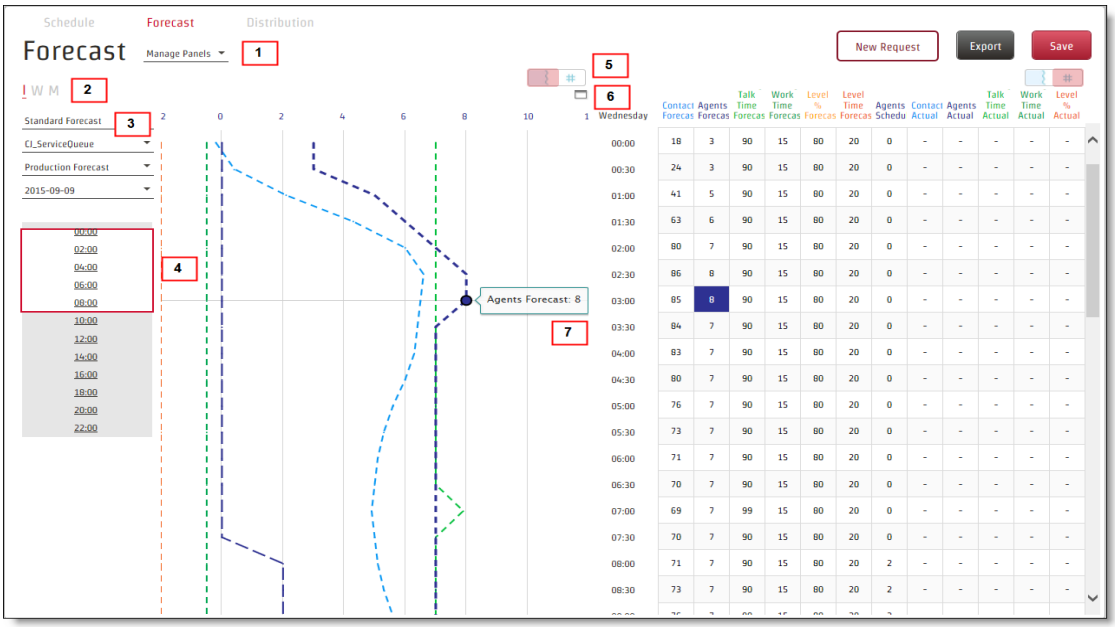
The Planning application is used to generate distributions, forecasts, and schedules.

The scheduling process follows these steps:

1. Historical data is used to generate a distribution.
2. The distribution and historical data is used to generate a forecast.
3. The forecast is used to create a schedule.

Working with the Planning Page

The Planning page displays forecasts and distributions in both tabular and graphical format.

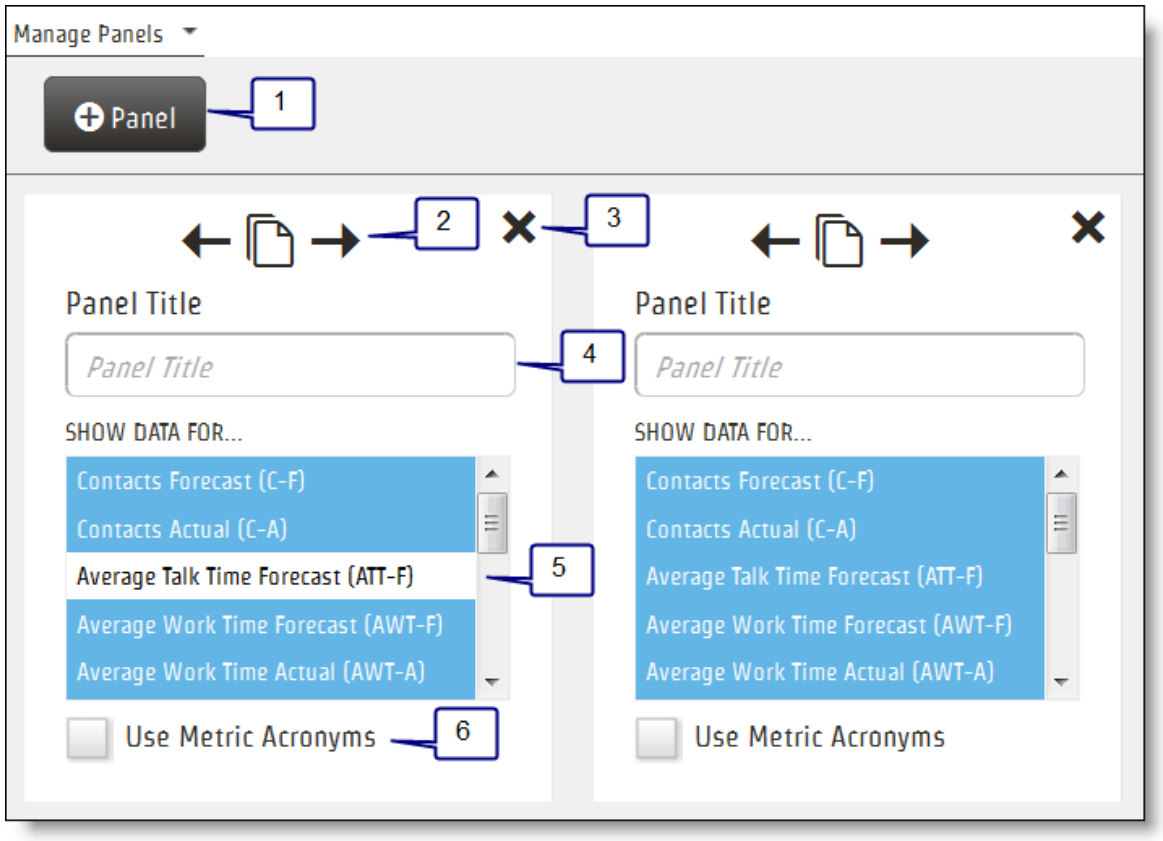


The following table describes each numbered area in this figure of the Forecast page.

Callout	Description
1	Click Manage Panels to configure the graphs and tables displayed on the page. See Panel Manager for more information.
2	Control the zoom level here. click I, W or M to view your data by: • Interval (I). Data is displayed by half-hour interval for one day. • Week (W). Data is displayed in 3-hour intervals for 7 days. • Month (M). Data is displayed by day for each day of the month. The zoom level control is found only on the Forecast view.
3	Select the date (forecasts) or day (distributions), service queue, and standard or strategic forecast or distribution you want to view from these drop-down lists.
4	The long view slider shows the range of data you are viewing. Slide it up and down to change the dates viewed (week or month view) or hours viewed (interval view).
5	Graph/table control. Click the left button (graph) or right button (table) to toggle between the two views of the data in the panel.
6	Horizontal graph button. Click this button to display the graph in horizontal format rather than the default vertical format.
7	Data points. Select a point on a line in the graph and the corresponding value in the table is highlighted (the reverse is also true: select a value in the table and the corresponding point on a line is highlighted). The lines are the same color as the column header of the data associated with it in the table. Hover text displays information about the data point. In Interval View, you can drag data points left and right to change their values. See *Editing a Forecast or Distribution* for more information.

Panel Manager

Use the Panel Manager to configure what is displayed on a forecast or distribution page.



The following table describes each numbered area in this figure of the Panel Manager.

Callout	Description
1	Click the button to add a new panel.
2	These three icons allow you to move and copy a panel. From left to right, they are: • Move this panel to the left • Add a copy of this panel • Move this panel to the right
3	Click the X to delete the panel.
4	Enter a name to identify the panel.
5	This is a list of all the metrics available to be displayed in the panel. Metrics are selected when highlighted in blue.

Callout	Description
6	Select this check box to use metric acronyms instead of the full names as table column headers. Note that selecting this for a graph has no effect on the graph, it applies only to tables.

Editing a Forecast or Distribution

Forecasts and distributions can be edited in a number of ways.

Dragging Lines in the Graph

In Interval View, you can drag the data points on the lines in the graph to increase or decrease the value that data point represents.

Note: You cannot drag lines in a graph that is displayed horizontally.

- Forecasts: You must be displaying the data at the Interval (I) zoom level in order to edit the forecast data. Note that you cannot edit any actual data (such as the Contacts Actual) or the number of agents scheduled (Agents Scheduled).
- Strategic forecasts: There are no zoom levels for strategic forecasts.
- Distributions: Distributions are displayed only at the Interval zoom level, so can be edited. Note that you cannot edit the contact ratio data, but you can edit the other values in the distribution.

Editing Data in the Table

You can edit fields in the table. Changes you make are reflected immediately in the graph.

- Double-click a table cell to edit it. Tab out of the cell or press Enter for the new value to "stick".
- Press Tab to move cell to cell to the right.
- Press Shift+Tab to move cell to cell to the left.
- Press Enter to move down one cell at a time
- Press Shift+Enter to move up one cell at a time.

Editing Forecast Totals

You can edit the Summary line for certain fields on the Forecast page in the Interval, Week, and Month zoom levels. The following table lists these fields and how editing the summary line affects the data.

Field	Effect on Data
Agents Forecast	The new summary value is spread out proportionally throughout the time period based on the pre-edit values. If the pre-edit values are all zero, then the new value is spread out evenly across all intervals in the period. This edit does not cause any other metrics to be recalculated. This edit is allowed only at the Interval zoom level.
Average Talk Time Forecast	The new summary value is applied as is throughout the time period. This edit causes the Agents Forecast value to be recalculated at each interval.
Average Work Time Forecast	The new summary value is applied as is throughout the time period. This edit causes the Agents Forecast value to be recalculated at each interval.
Contacts Forecast	The new summary value is spread out proportionally throughout the time period based on the pre-edit values. If the pre-edit values are all zero, then the new value is spread out evenly across all intervals in the period. This edit causes the Agents Forecast value to be recalculated at each interval.
Service Level % Forecast	The new summary value is applied as is throughout the time period. This edit causes the Agents Forecast value to be recalculated at each interval.
Service Level Time Forecast	The new summary value is applied as is throughout the time period. This edit causes the Agents Forecast value to be recalculated at each interval.

Note: The numbers you see after making edits at the Week and Month zoom levels but before saving might (and likely will) change slightly after the changes are saved and propagated to the underlying interval data.

Editing Strategic Forecast Totals

You can edit any strategic forecast column at the Year zoom level except for Agents Forecast, which is computed from the values in other columns.

Note: The Contacts Forecast Summary value represents the total number of contacts for the year. If that value is changed to a value that averages out to fewer than 0.5 calls per day, it is rounded down to zero. Therefore it is possible to see a zero for the monthly Contacts Forecast value.

Copying and Pasting Data in the Table

You can copy and paste data in the table using standard Windows shortcut keys.

- Click and drag with your mouse to select specific rows and columns in the table, or Ctrl + A to select the entire table.
- Use Ctrl + C to copy the selected cells to the clipboard in TSV (tab separated value) format. This action copies both editable and read-only columns.
- Use Ctrl + V to paste the contents of the clipboard into table cells. The data you are pasting can be in TSV or CSV format. You can paste into a specifically chosen group of cells, or just select the cell that becomes the upper left corner of your pasted data. The data is pasted into the selected cells, unless the selected column is read-only. You cannot paste copied data into read-only columns. If the copied data is too big to fit into the selected paste area, paste expands the selection to the size of the data on the clipboard. For example, if you select a 2 × 2 area but the data on the clipboard is 3 × 3, then it will paste 3 × 3. The pasted data is highlighted in the table.

Applying an Adjustment Factor to a Column

You can apply an adjustment factor to edit every value in a forecast table column by the same percentage. For example, to increase the values in a column by 20%, you apply an adjustment factor of 1.2.

To apply the adjustment factor, double-click the column header and enter the desired value in the dialog box. The dialog box is available only for columns you can edit this way. This feature is not available for distributions.

Distributions

A distribution consists of one week's worth of contact data for every 30-minute interval of the day. The data includes the following:

- Contact Ratio—Percentage of the day's total contacts
- Contacts Distribution—Number of contacts received

- Average Talk Time—Average talk or processing time
- Average Work Time—Average after contact work time

The distribution determines the general pattern of contacts for a service queue, which days and hours have a high volume and which have a low volume.

This is how WFM generates a distribution:

1. WFM calculates the average number of contacts received in the reference period for each schedule interval for every day of the week selected in the distribution request. Days with special events are disregarded.

   Example: To calculate the average contact volume for the 08:30 to 09:00 interval on Monday, WFM takes the sum of the volume for the 08:30 to 09:00 interval for each Monday in the reference period and divides the total by the number of Mondays in the reference period.

2. WFM then divides the result for each half hour by the average number of contacts received for the entire day to determine the percentage of the day's contacts that arrive during this interval.
3. WFM calculates the average talking time (interactive service queues) or processing time (non-interactive service queues) and after contact work time values per contact for each half hour.

   Example: To calculate the average talking time/processing time for the 08:30 to 09:00 interval on Monday, WFM takes the sum of talking time/processing time for each contact between 09:00 and 09:30 for each Monday in the reference period and divides the total by the number of contacts to determine the average talking time/processing time. WFM uses the same method to calculate average work time.

The future does not always repeat the past. Future events can cause a contact distribution to change. If you know about upcoming events that might affect a distribution, you can use the edit the distribution to account for those events. For any half-hour interval, you can change the number of contacts likely to arrive, the average talk or processing time, and the average after contact work time. See *Editing a Forecast or Distribution* for more information.

Guidelines for Generating a Distribution

Choosing an appropriate reference period is important for generating a distribution suitable for your forecast period.

You can generate a distribution once and reuse it for every forecast or generate a new distribution every time you generate a forecast. A distribution and forecast are linked automatically—a service queue can only have one production distribution and one production forecast at any given time.

The type of distribution you generate depends on the type of service queue you are generating it for. Use the following guidelines when generating a distribution.

- If your daily or weekly contact data fluctuate wildly, choose a longer reference period. If your contact data is fairly stable, choose a shorter reference period.
- If your contact data is fairly stable or seasonal, choose a longer reference period from the same period last year.
- If you have at least a year's worth of historical data and your business and routing patterns have not changed dramatically, use a reference period from a year earlier that is similar to the forecast period. This will include seasonal patterns.
- If you have less than a year's worth of historical data or your contact center conditions have changed dramatically, identify a more recent period that is likely to have contact data that is similar to the forecast period.
- If the contact data is reasonably stable throughout the year, you might go several months without having to generate a new distribution.
- If the contact data varies frequently or shows seasonal variation, you might need to regenerate your distribution at least once a month or every time you create a forecast.

Note: Distributions ignore dates within your reference period that have special events assigned to them, and dates that are tagged as closed days.

Managing Distributions

Use the Distribution Requests page (Schedules and Planning > Planning > Distribution > New Request) to do the following:

- Submit a production distribution request
- Submit an existing named distribution request
- Submit a new named distribution request

The production distribution is used by default to generate a forecast (although you can specify to use a named distribution instead). There can be only one production distribution.

In contrast, there can be many named distributions. Named distributions are used to analyze how different conditions affect contact volumes and agent schedules. A named distribution can be generated with historical data like a production distribution is, but it can also be generated without any historical data and then populated manually.

Note: If you are confident that the contact volume and distribution at your contact center are stable, then you only need to generate one distribution and one forecast, and you do not need to use named distributions.

Viewing a Distribution

To view a distribution:

1. On the Planning page, select Distribution.
2. Select the service queue you ran the distribution for.
3. Select the production or named distribution. The distribution appears in both tabular and graphical form.
4. Select the day of the week you want to view from the drop-down list, or scroll the displayed data up or down and click the black bar at the bottom to view the next day's data or the black bar at the top to view the previous day's data.

Data in the Distribution Summary

The data in the Distribution Summary row is calculated as described in the following table.

Column	Summary Calculation
Contact Ratio	Total of column values
Contacts Distribution	Total of column values
Average Talk Time	Weighted average by contact
Average Work Time	Weighted average by contact

Generating a Named Distribution

Use the Distribution Request page to submit a named distribution request. The request can generate a new named distribution or reuse an existing named distribution name to overwrite that named distribution with new data.

To generate a named distribution:

1. On the Distribution Request page, select the desired option: submit a new named distribution request or submit an existing named distribution request.
2. Select a service queue. Note that while you can select multiple service queues for a production distribution, you can select only one service queue for a named distribution.

3. Enter a unique name for the named distribution if this is a new request, or select the existing named distribution name if you are reusing an existing named distribution name.
4. Enter the start date and end date of the desired reference period. The reference period should have historical data that closely resembles the dates for which you want to generate a forecast. There should be data for every selected day of the week in your reference period. If there is no data, WFM will fill those periods with zeros.
5. Select the days of the week you want to calculate a distribution for. By default every day of the week is selected.
6. Decide if you want the service queue standard times (Average Talk Time and Average After Contact Work Time) to be updated based on this distribution.
7. Enter a run date and time to schedule the request. If you do not specify a later date and time, the request runs immediately.
8. Click Submit.

Once your request has run successfully, you can view the distribution and edit it as needed.

Managing a Named Distribution

Once a named distribution is run, there are a number of actions you can take with it besides editing it. These actions are controlled by the buttons in the upper right corner of the Distribution page.

With these buttons, you can:

- Save the edited production or named distribution.
- Rename the named distribution. This function does not copy the distribution, but changes the name of this distribution. Once changed, you will not see the old name in any list of named distributions for this service queue.
- Delete the named distribution.
- Copy the named distribution to production. This function overwrites the data in the existing production distribution with the data from this named distribution. For example, if the named distribution has data only for Monday and Tuesday, but the production distribution had data for every day of the week, after the copy, the production distribution will also contain data only for Monday and Tuesday.
- Export the data in the production or named distribution as a CSV-format file named export.csv for use in a spreadsheet application such as Excel. The data exported is that of the currently-displayed day. If you want to export the data for the entire week, you must do it one day at a time.

Generating a Production Distribution

To generate a production distribution:

1. On the Distribution Request page, select the Submit a production distribution request option.
2. Select one or more service queues. The available service queues listed are those that do not have the "Do not generate forecasts or schedules for this service queue" check box selected on the Service Queues page.
3. Enter the start date and end date of the desired reference period. The reference period should have historical data that closely resembles the dates for which you want to generate a forecast. There should be data for every selected day of the week in your reference period. If there is no data, WFM will fill those periods with zeros.
4. Select the days of the week you want to calculate a distribution for. By default every day of the week is selected.
5. Decide if you want the service queue standard times (Average Talk Time and Average After Contact Work Time) to be updated based on this distribution.
6. Enter a run date and time to schedule the request. If you do not specify a later date and time, the request runs immediately.
7. Click Submit.

Once your request has run successfully, you can view the distribution and edit it as needed.

Forecasts

A forecast is a prediction of the number of contacts for every 30-minute interval of the day that a contact center will receive over a specific period of time.

WFM uses historical contact data to generate a distribution, then uses the historical data and the distribution to generate a forecast. The forecasts are then used to create a schedule.

There are three types of forecasts, production forecasts, named forecasts, and strategic forecasts.

- The production forecast is the default forecast used to create a schedule. It uses historical data to predict the contact volume for the schedule period. There can be only one production forecast.
- Named forecasts are created to reflect “what if” scenarios in anticipation of expected events that can affect contact volume. Some examples of these events are sales campaigns and severe weather. These named forecasts are saved and can be used instead

of the production forecast if necessary to create a more accurate schedule.

- Strategic forecasts are five-year forecasts used for long term planning.

The Forecasting Process

To create a forecast, you must complete these tasks.

Select a Reference Period

WFM uses historical data to project future requirements. You need to identify the reference period with the historical data that most closely resembles the period for which you want to generate a forecast.

A reference period should reflect any weekly or seasonal patterns that are likely to occur during the forecast period. Choosing a reference period from a year prior to the forecast period often provides the best reflection of weekly and seasonal patterns.

To view the historical data available to you for the service queue and the reference period you are considering, use the *View and Edit Historical Data* page.

Generate a Distribution

Generate a distribution for the service queue and reference period you selected.

Edit the Distribution

If needed, edit the distribution. For example, if you expect the contact volume to be lower on a certain day of the week in your forecast period, you can decrease the contact volume on that day in the distribution.

Note: If a special event was assigned to that day, then WFM normalizes the contact volume so that distributions are more accurate. There is no need for you to manually adjust the distribution in that case.

Generate the Forecast

When you launch the forecast request, WFM performs these steps:

1. Applies any special event adjustments you assigned for the service queue in the historical reference period.
2. Generates the average contact volume for each day of the week using data from the reference period.

> **Note:** When calculating contact volumes, WFM rounds near (up or down to the nearest whole number) except when the value would be rounded to zero. In that case the value is rounded up to 1.

3. If you opted to use trends, determines the trend percentage by day and adjusts the volume projections accordingly.
4. Adjusts the volume projection for each day by the adjustment factor.
5. Applies the contact ratios from the distribution for each interval in the day. Contacts are redistributed for non-interactive service queues that use even or proportional redistribution during closed hours. Otherwise, the number of contacts is taken from the contacts arriving during service queue open hours. If the service queue is closed during an interval, the number of contacts is zero.
6. Multiplies the projected contacts for each interval by the average handling time to estimate the amount of agent handling time required.
7. Performs statistical analysis of the agent handling time estimates and the service level goals to determine the number of agents required per interval.

> **Note:** If there is a date with a firm date association within the forecast period, WFM uses the volume from the firm date association reference date, but the distribution of that contact volume by interval for the day comes from the distribution.

Review the Forecast

If you do not think the forecast values are on target, edit the forecast.

Managing Forecasts

Use the Forecast Requests page (Schedules and Planning > Planning > Forecast > New Request) to do the following:

- Submit a production forecast request
- Submit an existing named forecast request
- Submit a new named forecast request
- Submit a strategic forecast request

Using Trends in Forecasting

When you choose to generate a forecast with trends, WFM calculates an annual growth rate in contact volume from two reference periods that do not overlap.

The choice of reference periods is an art that should take into account any seasonal fluctuations in the historical data. If historical data is seasonal, it is best to use the same portions of two different years to determine the trend.

Trends are exponential. This means that if the contact center experiences 5% growth per year in contact volume, then in two years, it will experience 10.25% growth (from 1.05 squared, which is 1.1025).

For each of the two trend reference periods, the average contact volume for each day of the week is computed, as well as the median date for each day of the week. The median date for a day of the week is the middle instance of that day within the date range. For example, if there are five instances of Wednesday in the reference period, the median Wednesday is the third instance of that day.

Additionally, for each reference period, an overall average contact volume and mean date is computed. Then, the results from the two reference periods are combined to produce a growth rate and growth duration. From this the annual growth rate is computed.

For example, suppose the two reference periods result in the following average contact volume and mean dates:

Reference Period 1 (2012-07-01 through 2012-08-04)

Day of the Week	Median Date	Average Contact Volume
Sunday	2012-07-15	400
Monday	2012-07-16	3000
Tuesday	2012-07-17	2800
Wednesday	2012-07-18	2600
Thursday	2012-07-19	2400
Friday	2012-07-20	2200
Saturday	2012-07-21	2000
OVERALL	2012-07-18	2200

Reference Period 2 (2013-01-01 through 2013-02-04)

Day of the Week	Median Date	Average Contact Volume
Sunday	2013-01-20	425
Monday	2013-01-21	3126
Tuesday	2013-01-15	2940
Wednesday	2013-01-16	2730

Day of the Week	Median Date	Average Contact Volume
Thursday	2013-01-17	2544
Friday	2013-01-18	2310
Saturday	2013-01-19	2095
OVERALL	2013-01-18	2310

For each day of week and for the overall averages WFM computes the growth factor and growth period (in years, using 365.2425 as the length of one year). Finally, WFM computes the annual growth rate from the formula:

$$\text{Annual growth factor} = \text{growth factor}^{(1-\text{growth period})}$$

where the growth factor and growth period are computed from the two trend reference data periods.

Computation of the annual growth factor

Day of the Week	Growth Period (Days)	Growth Period (Years)	Growth Factor	Annual Growth Factor
Sunday	189	0.517464	1.0625	1.124296
Monday	189	0.517464	1.0420	1.082753
Tuesday	182	0.498299	1.0500	1.102867
Wednesday	182	0.498299	1.0500	1.12867
Thursday	182	0.498299	1.0600	1.124047
Friday	182	0.498299	1.0500	1.102867
Saturday	182	0.498299	1.0475	1.097604
OVERALL	184	0.503775	1.0500	1.101694

These annual growth factors (by day of the week, and by the overall factor if there was no data for a particular day of week) form the forecasting trend.

Data in the Forecast Summary

The data in the Forecast Summary row is calculated as described in the following table.

Column	Summary Calculation
Contacts Forecast	Total of column values
Agents Forecast	Weighted average by period duration
Average Talk Time Forecast	Weighted average by contact
Average Work Time Forecast	Weighted average by contact
Service Level % Forecast	Weighted average by contact
Service Level Time Forecast	Weighted average by contact
Agents Scheduled	Weighted average by period duration
Contacts Actual	Total of column values
Agents Actual	Weighted average by period duration
Average Talk Time Actual	Weighted average by contact
Average Work Time Actual	Weighted average by contact
Service Level % Actual	Weighted average by contact

Generating a Production Forecast

To generate a production forecast, follow these steps:

1. On the Forecast Request page, select the Submit a production forecast request option.
2. Select the start and end dates of the period the forecast will cover.
3. Select the service queue type.
4. Select the one or more service queues the forecast is for. The available service queues are all of the service queue type you selected and that do not have the "Do not generate forecasts or schedules for this service queue" check box selected on the Service Queues page.
5. Select the distribution to be used. If you selected multiple service queues, this must be the production distribution. If you selected one service queue, then this can be either the production distribution or a named distribution. Whichever type of distribution you choose, it must have been run for the service queues you selected.

6. If you want to use trends to calculate the forecast, select the “Use trends when calculating the forecast” check box. See Using Trends in Forecasting for more information on how the trend is calculated.
7. If you selected the “Use trends when calculating the forecast” check box, enter two reference ranges to be used to calculate the trend. Range 1 must be before Range 2, and the two ranges cannot overlap. If you did not select the Trends check box, enter the start and end dates of the reference period.
8. Choose the source of the contact handling time metrics used to calculate the forecast. You can use the average talk time forcast and average after contact work time values calculated by the distribution you selected, or the values entered on the Service Queues page of each of the service queues this forecast is for.

   Note: If you have two or more panels configured on your Forecast Planning page, the name of the Average Talk Time Forecast (ATT-F) field wraps to a third line. It is possible that the ATT-F field label could be mistaken for the View/Historical Data Average Talk Time (ATT) field.

9. If desired, enter an adjustment factor to adjust the forecasted contact volume up or down. The default value is 1.0, which means no change.
10. **For Interactive service queues**: If you want to configure the service level objective by intervals, select the “Configure the service level objective” check box. When you select it, a table is displayed that contains service level objective values. If the forecast is for a single service queue, the table shows the standard service level objective configured on that service queue's Service Queues page. If the forecast is for multiple service queues, the table shows a default service level objective of 80% and 20 seconds. You can then modify the service level percentage by interval as desired. **For non-interactive service queues**: If you want to configure the handling threshold, select the “Configure the service level objective” check box. When you select it, the Handling Threshold field is displayed. Enter the number of minutes (from 0 to 4320) in which contacts must be handled.
11. Enter a run date and time to schedule the request. If you do not specify a later date and time, the request runs immediately.
12. Click Submit.

Once your request has run successfully, you can view the forecast and edit it as needed.

To view the forecast, follow these steps:

1. On the Planning page, select Standard Forecast.
2. Select the service queue you ran the forecast for.
3. Select Production Forecast.
4. Select the date of the forecast. The forecast appears in both tabular and graphical form, where it can be edited if desired.

Generating a Named Forecast

Use the Forecast Request page to submit a named forecast request. The request can generate a new named forecast or reuse an existing named forecast name to overwrite that named forecast with new data.

To generate a named forecast, follow these steps:

1. On the Forecast Request page, select the Submit a new named forecast request option.
2. Select the start and end dates of the period the forecast will cover.
3. Select the service queue type.
4. Select the service queue the forecast is for. The available service queues are all of the service queue type you selected and that do not have the "Do not generate forecasts or schedules for this service queue" check box selected on the Service Queues page.
5. Enter a unique name for the forecast.
6. Select the distribution to be used. This can be the production distribution or a named distribution for the selected service queue.
7. If you want to use trends to calculate the forecast, select the Trends check box.
8. If you selected the Trends check box, enter two reference ranges to be used to calculate the trend. Range 1 must be before Range 2, and the two ranges cannot overlap. If you did not select the Trends check box, enter the start and end dates of the reference period.
9. Choose the source of the contact handling time metrics used to calculate the forecast. You can use the average talk time and average after contact work time values calculated by the distribution you selected, or the values entered on the Service Queues page of the service queue this forecast is for.
10. If desired, enter an adjustment factor to adjust the forecasted contact volume up or down. The default value is 1.0, which means no change.
11. **For Interactive service queues**: If you want to configure the service level objective by intervals, select the Service Level Objectives check box. When you select it, a table is displayed that contains the standard service level objective configured on that service queue's

Service Queues page. You can then modify the service level percentage by interval as desired. **For non-interactive service queues**: If you want to configure the handling threshold, select the Service Level Objectives check box. When you select it, the Handling Threshold field is displayed. Enter the number of minutes (from 0 to 4320) in which contacts must be handled.

12. Enter a run date and time to schedule the request. If you do not specify a later date and time, the request runs immediately.
13. Click Submit.

Once your request has run successfully, you can view the forecast and edit it as needed.

To view the forecast, follow these steps:

1. On the Planning page, select Standard Forecast.
2. Select the service queue you ran the forecast for.
3. Select the named forecast.
4. Select the date of the forecast. The forecast appears in both tabular and graphical form, where it can be edited if desired.

Generating a Strategic Forecast

A strategic forecast displays the number of agents required per month to meet the projected requirements of a service queue.

The strategic forecast is used to generate various strategic planning reports.

Note: Strategic forecast requests are successful only for interactive service queues. They will fail if run for a non-interactive service queue.

In order for a strategic forecast to be generated, there must be a production distribution for each service queue.

The forecast is calculated based on these factors:

- The contact volume trend calculated from the service queue historical data in the two reference ranges you select
- The Average Talk Time, Average After Contact Work Time, and Service Level Objective from the production distribution

This reference period consists of two ranges. Range 1 must be for a period earlier than Range 2, and the two ranges cannot overlap.

Best Practices: We recommend you choose your reference periods to maximize the accuracy of the calculated trend. Longer reference periods are more accurate than shorter ones. Choosing periods that do not include significant aberrations from normal operations (for example, a lengthy power outage) that can affect the calculated trend is also a good idea.

To run a strategic forecast request, follow these steps:

1. On the Forecast Request page, select the Submit a new strategic forecast request option.
2. Select one or more service queues.
3. Select start and end dates for the Range 1 and Range 2 reference periods. Range 1 must be earlier than Range 2 and the two ranges cannot overlap.
4. Enter a run date and time to schedule the request. If you do not specify a later date and time, the request runs immediately.
5. Click Submit.

Once your request has run successfully, you can view the forecast and edit it as needed.

To view the strategic forecast, follow these steps:

1. On the Planning page, select Strategic Forecast.
2. Select the service queue you ran the strategic forecast for.
3. Select the date of the strategic forecast.
4. The strategic forecast appears in both tabular and graphical form, where it can be edited if desired.

Schedules

A schedule lists the times when agents are in service for a service queue. For each agent, a schedule includes the start and end times for work shifts, breaks, lunches, exceptions, overtime, and projects.

Schedules are based on the agents' work shifts. When WFM generates a schedule, it takes into account the agents' work shifts and the forecast associated with the agents' service queue. WFM looks at the requirements and the agents' availabilities to create the most optimal schedules for the contact center and its agents.

WFM can also use shrinkage metrics when creating schedules. Shrinkage is applied against a full 24-hour period and increases the number of actual FTEs scheduled.

When creating a schedule, WFM sorts the service queues (both those individually selected and those assigned to the selected multiskill groups) by the service queue priority, and for each service queue, sorts the agents by skill mapping priority and multiskill group priority, followed by the service queue scheduling order.

Agents assigned to fixed and dynamically scheduled work shifts are scheduled before agents assigned to variable work shifts. Agents assigned to assignment work shifts are scheduled last. After sorting agents, WFM schedules the first agent based on the agent's work shift preferences and optimizes the agents' breaks, lunches, and projects based on the minimum and maximum delays entered. The work shifts, breaks, lunches, and projects are influenced by coverage requirements. After scheduling the first agent, WFM schedules the next agent, and so on.

Scheduling Options

When scheduling agents, you have the option of using single service queues, virtual service queues, and multiskill groups. Each has attributes that make it suitable for different situations.

- Single service queues are suitable in contact centers where single-skilled agents support a service queue. For example, there could be an English voice service queue and a Spanish voice service queue. The agents assigned to the English voice service queue handle calls from English-speaking customers all day, every day.
- Virtual service queues are suitable when you wish to combine similar service queues of the same contact type (interactive or non-interactive). For example, you can combine several low-volume voice service queues into one virtual service queue. This aggregates enough volume so that accurate forecasting and scheduling can occur. Statistics for the individual low-volume service queues will not be available through WFM (but would be obtainable from the ACD), but that might not be of importance in your contact center.
- Multiskill groups are suitable when you want to aggregate multiple service queues and multiple contact types and schedule agents proportionally to support them. For example, a multiskill group might include service queues for English voice contacts and email contacts for Product A and Spanish voice contacts and email contacts for Product A. Because the multiskill group is set up to allocate specific percentages of an agent's time to each specific service queue, coverage forecasts and schedules will be more accurate for each service queue. The agent statistics are also allocated by percentage to each service queue and so are more accurate.

An agent's schedule can include a combination of single service queues, virtual service queues, and multiskill groups. For example, an agent might support a single service queue from 8 to 11 am and a multiskill group from 1 to 4 pm.

The needs of your contact center will guide you in choosing what scheduling option you use. You might find that a virtual service queue serves your purpose best, or that you want to be able to allocate agents to multiple contact types and multiple service queues during the same block of time and so opt to use multiskill groups.

IMPORTANT: The weights allocated to the service queues that make up a multiskill group should be as accurate as possible. If they are not accurate, the coverage for specific service queues will be too high or too low in the generated schedule.

Closed Days and Fixed Work Shifts

When WFM schedules an agent with a fixed or dynamically scheduled work shift, it schedules the agent for days, hours, and arrival times exactly as specified in the work shift configuration. It does not take into account a closed day for a service queue. As a result, an agent with a fixed work shift can be scheduled to work on a day when the contact center is closed (for example, a mid-week holiday).

To prevent this situation, create an exception and assign it to agents with fixed work shifts who would ordinarily be working on the closed day.

Scheduling Order

When the default scheduling method is used, WFM allows contact centers to define the scheduling order for each service queue (in the Scheduling Order section on the Service Queues page) by these criteria:

- Maximum hours available
- Minimum hours available
- Maximum hours per week
- Minimum hours per week
- Rank
- Company start date
- Department start date

This allows you to manage customer contact operations while maximizing the available agents for the most important activities.

Depending on your contact center's policies, you can schedule agents based on availability for a work shift, their seniority, or their ranking in the contact center.

Service Queue Priority

Assigning a priority number to a service queue allows WFM to resolve scheduling conflicts when agents are assigned to multiple service queues. Zero (0) is the highest priority.

To generate a schedule for a service queue, WFM finds the agents who are assigned to a skill mapping that is associated with the desired service queue. To generate a schedule for a multiskill group, WFM finds the agents who are assigned to the multiskill group. WFM then determines which agents have a work shift with available hours on the specified day. If the agent supports multiple service queues, WFM uses service queue priority to determine which service queue will be assigned to the agent for this schedule.

Example: You designate some of your agents to support two service queues and assign a priority to each service queue. If WFM generates the schedules for the two service queues and discovers there are not enough agents to support all forecast requirements across both service queues, it compares the priority value for the two service queues and schedules agents for the service queue with the highest priority first.

Generating a Schedule

To generate a schedule, follow these steps:

1. Access the Schedule Request page (Schedules and Planning > Planning > Schedule).
2. Select the scheduling method you want to use.
   - The Balanced option attempts to distribute agents so that it creates the same percentage of staffing in all intervals of the week. The consistency of that percentage will depend on user configurations and work shifts.

     Best Practice: Use service queue priority settings to fine-tune scheduling behavior. If the results of scheduling multiple service queues are not satisfactory (for example, you need to minimize the understaffing of an important service queue), make sure that the priority assigned to that service queue is far from the priorities assigned to the other service queues. For example, the important service queue is assigned a priority of 4 while other service queues are assigned priorities of 90 and 100. See *Service Queue Priority* for more information.

   - The Default option concentrates available staff in the earliest intervals they can be scheduled, resulting in schedules that tend to meet staffing requirements earlier in the day over those later in the day.

     Best Practice: If there are not enough agents to fully staff all service queues, using the Default option results in higher priority service queues being more fully staffed than lower priority service queues. Consider using the Balanced option to more evenly balance staffing across the days of the week, within a day, and between service queues.

3. Select the one or more multiskill groups and/or service queues to be scheduled.

4. Enter the start date and the number of weeks for the period you want to schedule. The start date used is the configured first day of the week of the week that contains the date you enter.
5. Select the “Apply shrinkage percentage to the schedule” check box if you want to apply shrinkage to the schedule to compensate for time lost due to vacation, breaks, holidays, illnesses, and so on. Shrinkage percentages are configured on the *Shrinkage* page.

   Note: The values in the shrinkage table are applied relative to the submit date of the request, not the current date.

6. Select the “Rotate work shifts” check box if you want WFM to automatically rotate work shifts according to the work shift rotations configured for each agent scheduled. If the check box is not selected, you must configure a work shift for the specific week on the agent's Agents page, or the agents must have completed their dynamic scheduling work shift selection for those weeks.
7. Enter a run date and time to schedule the request. If you do not specify a later date and time, the request runs immediately.
8. Click Submit.

Note: A schedule request will fail if there is no forecasted data for any of the days you are running the schedule for. Also, if any of the multiskill groups or service queues are associated with agents whose work shifts include the last day of the week, there should be forecasted data for the first two days of the next week. If there is no data for those extra two days, it is assumed that the forecast is zero (0) and this can affect how the agents are scheduled. The extra days might be needed in case unpaid work condition activities are applied that push the work shift from the last day of the week across midnight into the first two days of the next week (the extended work shift day after applying the work condition can be a maximum of 48 hours when unpaid durations are included).

Messaging

The Messaging application allows you to manage schedule requests.

Agents can request time off, exceptions, mentoring, 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 mentoring requests, and edit their own requests.

Supervisors and schedulers 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 and mentoring requests

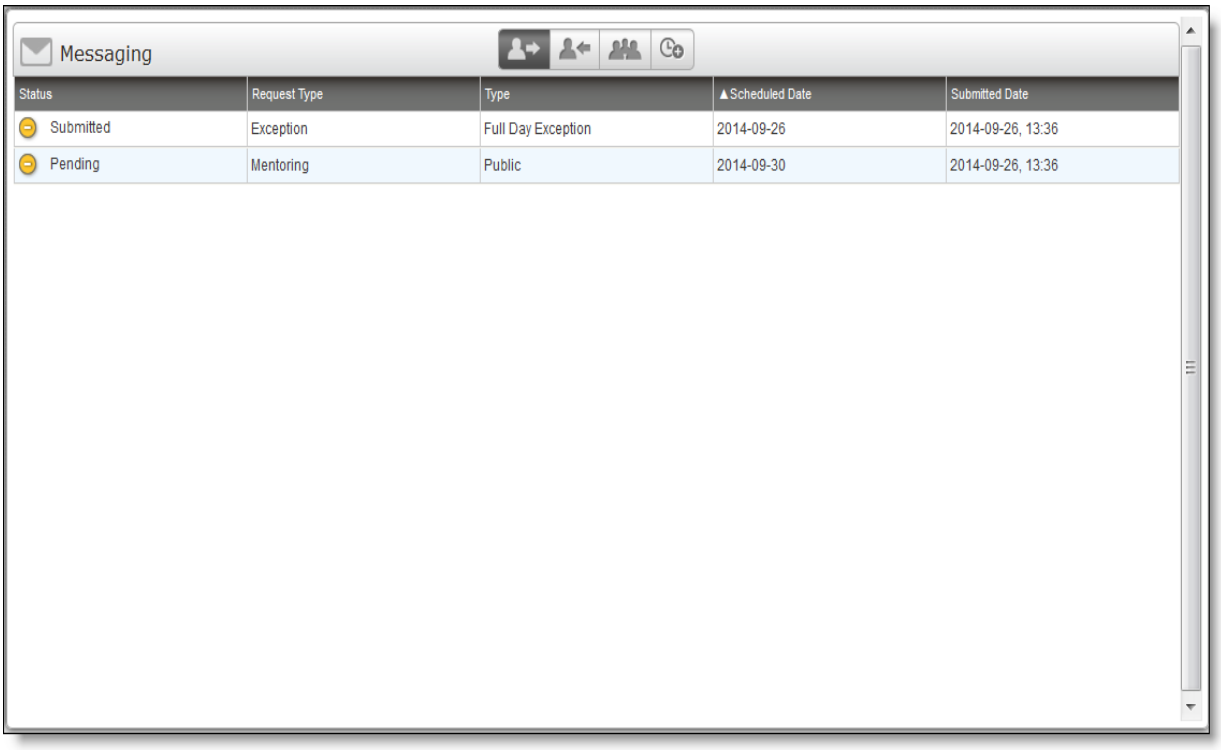
The default view is the Outbox. Requests can be retained from 6 to 99 months, with the default retention period set to 13 months. You cannot delete requests from any mail boxes yourself. They are deleted by the system when they pass the configured retention period.

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. From left to right, the icons are Outbox, Inbox, Public Box, and New Requests.

Outbox

The Outbox 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.



The following table describes the fields in the Outbox.

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.
Request Type	The general type of request.
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 requested event 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.

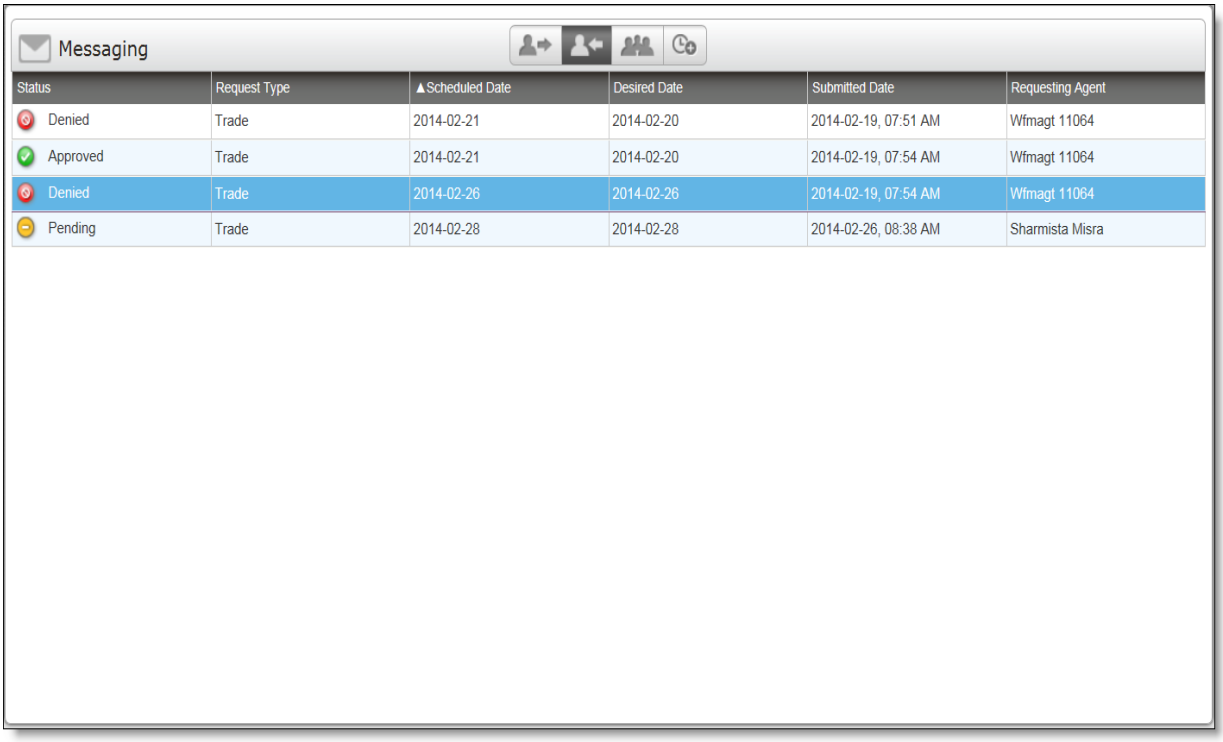
To delete a request that has not yet been approved or accepted:

1. Double-click the request.
2. Click Delete.

Inbox

The Inbox 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 and mentoring requests, so a trade or mentoring request you accept might be rejected by your supervisor.



The following table describes the fields in the Inbox.

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.
Scheduled Date	The date that the requested event occurs. By default, the Inbox 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, offer, or mentoring request.

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 an accepted 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.

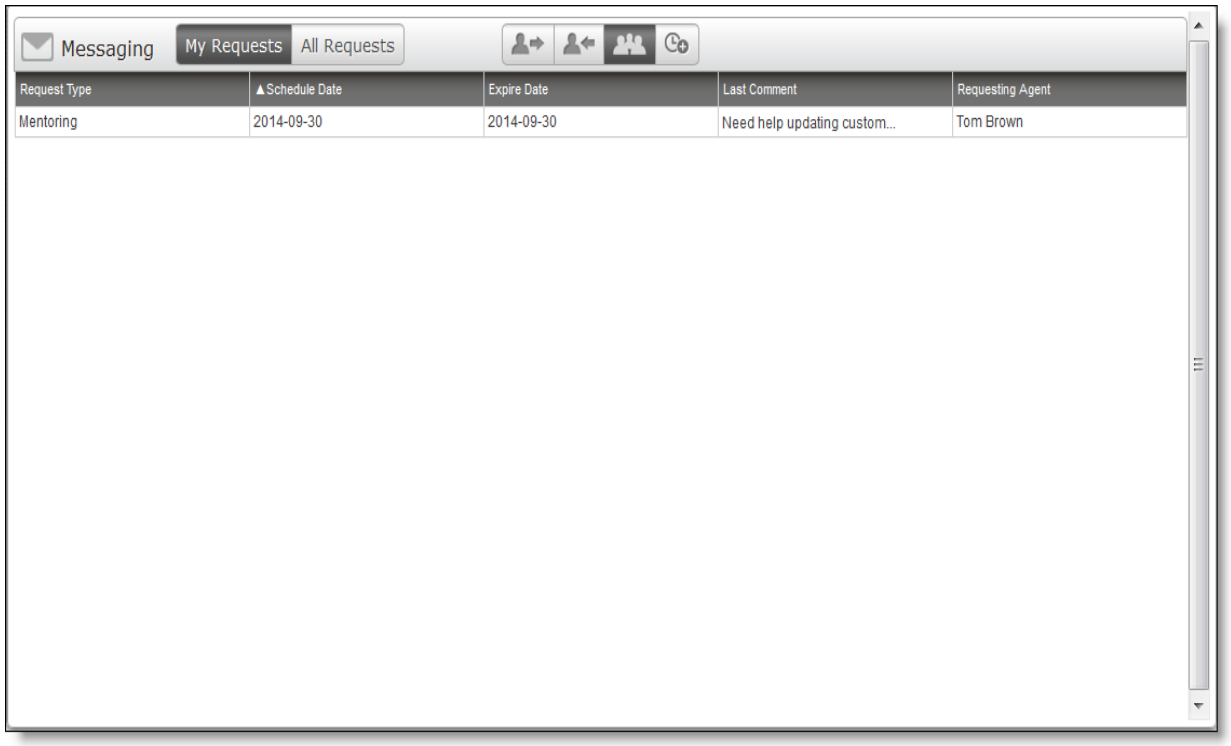
To confirm or reject an accepted mentoring request:

1. Double-click the request to open it.
2. Review the accepted request.
3. Click Confirm to accept the mentor, or Reject to refuse the mentor.

Public Box

The Public box contains all available public schedule offers and trades and mentoring requests from the agents in your view. A public offer, trade, and mentoring request 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: If a request is for a date that you cannot see yet (for example, it is for a week that is too far in the future for you to see any schedules for yet), that request will not appear in your Public Box.



Note: Supervisors have final authority over any schedule trades, offers, and mentoring requests, so a trade, offer, or mentoring request you accept might be rejected by your supervisor.

The following table describes the fields in the Public Box.

Field	Description
Request Type	The general type of request.
Schedule Date	The date that the requester wants to give up or schedule the mentoring session. By default, the Public Box is sorted by this date in ascending order.
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, offer, or mentoring request.

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. 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.

To accept a mentoring request:

1. Double-click the request to open it.
2. Review the details of the mentoring request, and compare your schedule to that of the requester's to make sure the time slot works for you.
3. Click Accept if you want to accept the mentoring request, 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, schedule trades, mentoring and dynamic availability.

- Creating an Exception request
- Creating a Time Off request
- Creating a Schedule Offer request
- Creating a Schedule Trade request
- Creating a Mentoring request
- Creating a Dynamic Availability request

Requests can be edited or deleted in certain situations. The following table describes when you can edit or delete a request.

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

To edit a request:

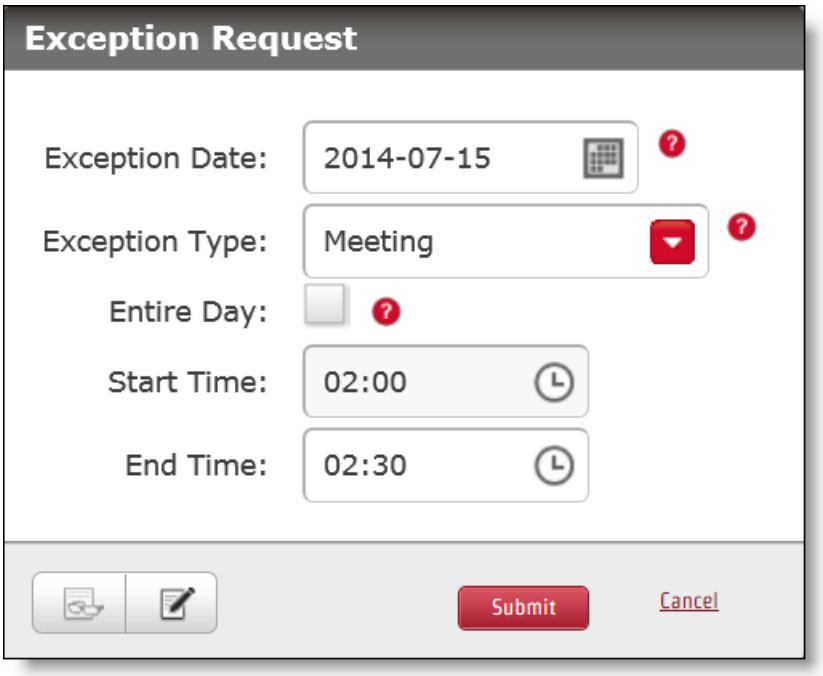
1. Double-click the request to open it.
2. Edit the request as desired.
3. Click Submit.

To delete a request:

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

Requesting an Exception

Use an exception request to request a change in your schedule for unplanned activities such as meetings, training sessions, unscheduled breaks, and absences. 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.

NOTE: For entire day requests, an exception is placed on the schedule over any paid activities in shifts that start on that day (regardless of whether the exception is paid or not paid) . Any unpaid activities in those shifts are replaced with a Not Available activity in the schedule. If you do not have a shift on that day, then the exception is not added to your schedule.

For partial day requests, an exception is placed on the schedule for the requested time period over any existing paid activities during that time period (regardless of whether the exception is paid or not paid) . Any overlapping unpaid activities in those shifts are replaced with a Not Available activity in the schedule. For example, if an exception partly covers an unpaid lunch, the part that is not overlapping remains a lunch. The part that overlaps with the exception is replaced with Not Available. If you do not have any existing paid activities during that time period, then the exception is not added to your schedule.

Exception requests are handled this way to ensure that the paid time for the day remains the same before and after the exception is applied.

The following table describes the fields in the Exception Request dialog box.

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.
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 250 characters) regarding the exception request. Any comment you add is not saved until the exception request itself is saved.

To create a new exception request:

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

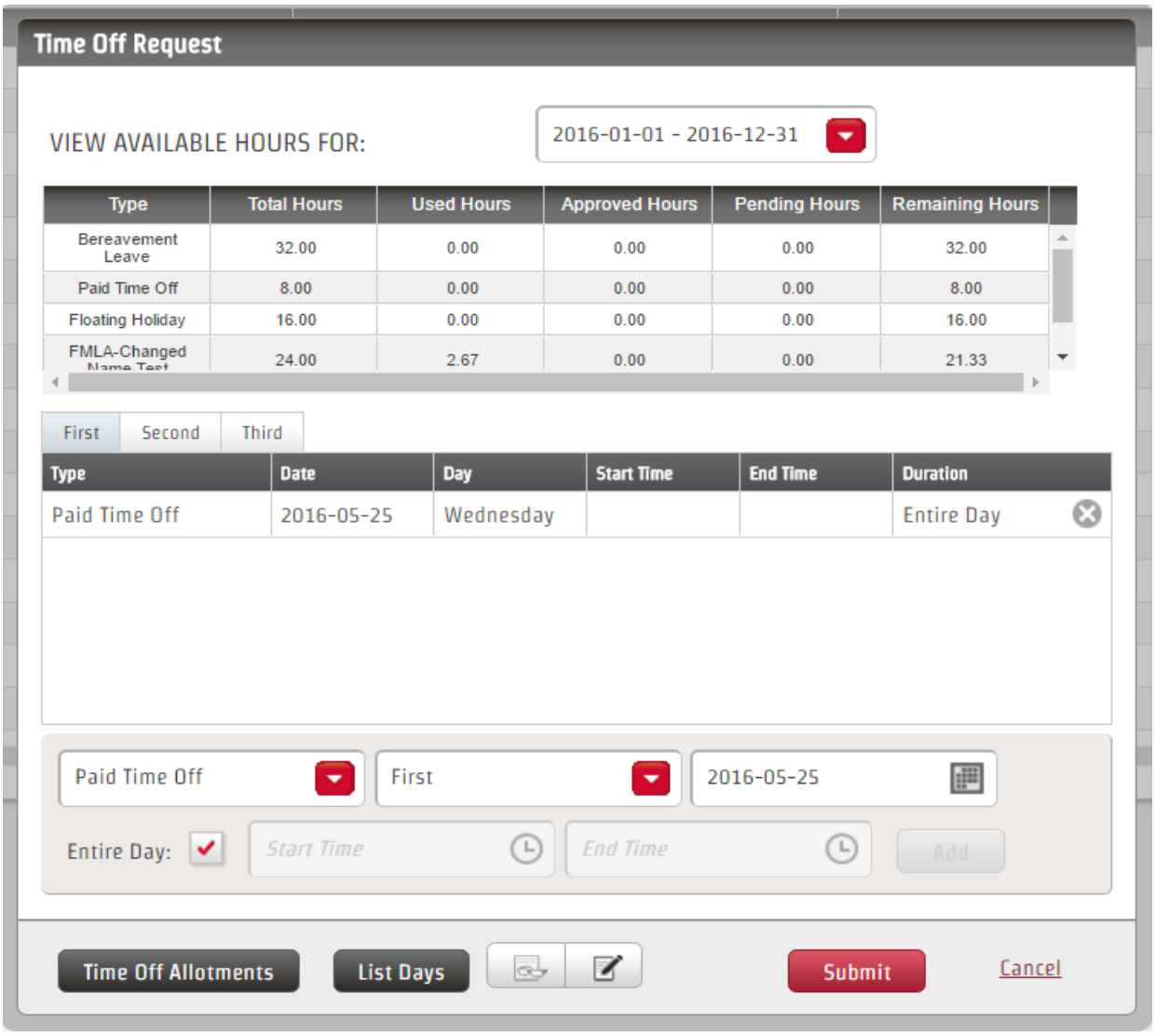
An exception request flows through the system as outlined in the following table.

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

Requesting Time Off

Use a time off request to schedule various types of time off from work. You can request multiple days and types of time off in one request. For example, if you want a week off but do not have enough vacation days to cover five days, you can also use time off from one of the other categories to make up the difference.

Note: If you do not have enough available hours for the type of time off you requested, you can still submit the request. You do not need to use time off hours from another category. It is up to your supervisor to allow you to use time off hours you have not yet accumulated.



You can submit multiple choices for time off in order of preference (first, second, or third choice). For example, you might want to take a week off in June as your first choice for vacation, but you also indicate that a week off in July is your second choice and a week off in August is your third choice. Your supervisor can approve one of your three choices.

The Time Off Request dialog box includes a table that shows how much time off you have available, how much you have used, and how much remains, in each of the time off categories. This information is compiled from the time off requests you have submitted.

There are buttons that can help you when requesting time off:

- List Days button, which displays a summary of your time off requests
- Time Off Allotments button (available only if configured by your administrator), which allows you to check if there are time off hours available on the day you want to take off.

The following table describes the fields in the Time Off Request dialog box.

Field	Description
View Available Hours For	Select the vacation plan date range that covers your time off request.
Type	The type of time off.
Total Hours	The total number of hours available to you for the time off type.
Used Hours	The number of hours you have used for the time off type.
Approved Hours	The number of hours that have been approved for the time off type, but not yet taken.
Pending Hours	The number of hours that you have requested for the time off type that have not yet been approved by your supervisor.
Remaining Hours	The number of hours for the time off type you have remaining.
First, Second, and Third Choice	Tabs that display your time off request preferences in this request.
Type	Select the type of time off you are requesting.
Choice	Choose the preference for the time off from the drop-down list.
Date	Select the day you want off from the calendar. You must select each day separately. Click Add to add the date to the 1st, 2nd, or 3rd Choice tab.
Entire Day	Select this check box if you want to take off the entire day. When selected, the Start Time and End Time fields are disabled.
Start Time	If you are taking a partial day off, enter the start time of the time off.
End Time	If you are taking a partial day off, enter the end time of the time off.
Write Comment	Click to enter an optional comment (maximum of 250 characters) regarding the exception request. Any comment you add is not saved until the exception request itself is saved.

To create a new time off request:

1. Click New Request and choose Time Off Request from the menu.
2. From the View Available Hours For drop-down list, choose the date range that covers your requested time off date.
3. From the Type drop-down list, choose the type of time off desired.
4. From the Choice drop-down list, choose the preference for the time off.
5. From the Date field, click the calendar icon to select a day. Dates with a gray background in the calendar are not available for time off. You cannot add the same day twice in the same request (for example, in both a first and second choice).
6. Click Add.
7. Repeat adding dates to the request, using the first, second, and third choice option as desired.
8. Add an optional comment by clicking the Write Comment button.
9. Click Submit.

Viewing a Summary of your Time Off Requests

The Time Off Summary popup lists all your approved and pending time off requests in date order.

To view a summary of all your time off requests:

1. Click New Request and choose Time Off Request from the menu.
2. Click List Days to display your time off summary.
3. After closing the Time Off Summary dialog box, click Cancel to dismiss the Time Off Request dialog box.

Viewing Time Off Allotments

Note: This feature is available only if the administrator has configured WFM to display the Time Off Allotments button.

The Time Off Allotments popup displays the current available time off allotted for a service queue for a selected month. It shows the available FTEs (full time equivalents) allotted for each day of a selected month, and the average gap between the scheduled and forecasted FTEs for that day. A negative number indicates understaffing, and a positive number indicates overstaffing. A day that shows allotted FTEs and a positive gap might be a better choice for time off than a day that shows a negative gap.

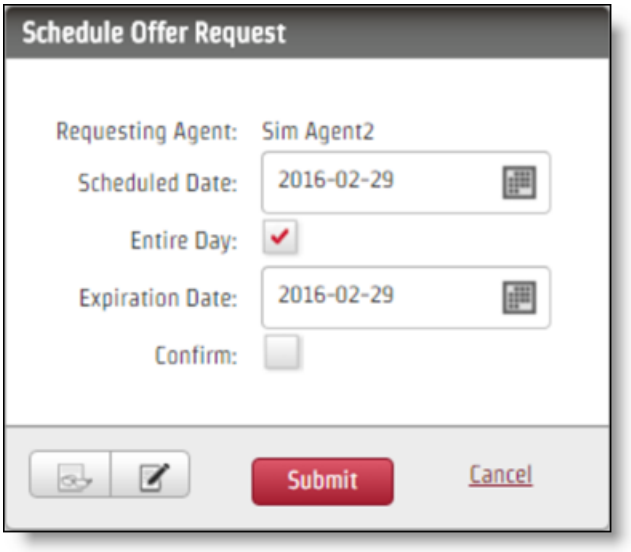
To view a summary of the time off allotments:

1. Click New Request and choose Time Off Request from the menu.
2. Click Time Off Allotments and select the desired service queue, month, and year.
3. After closing the Time Off Allotments dialog box, click Cancel to dismiss the Time Off Request dialog box.

Requesting a Schedule Offer

Use a schedule offer request to make a all or part of 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.

This image shows a request for an entire day schedule offer.

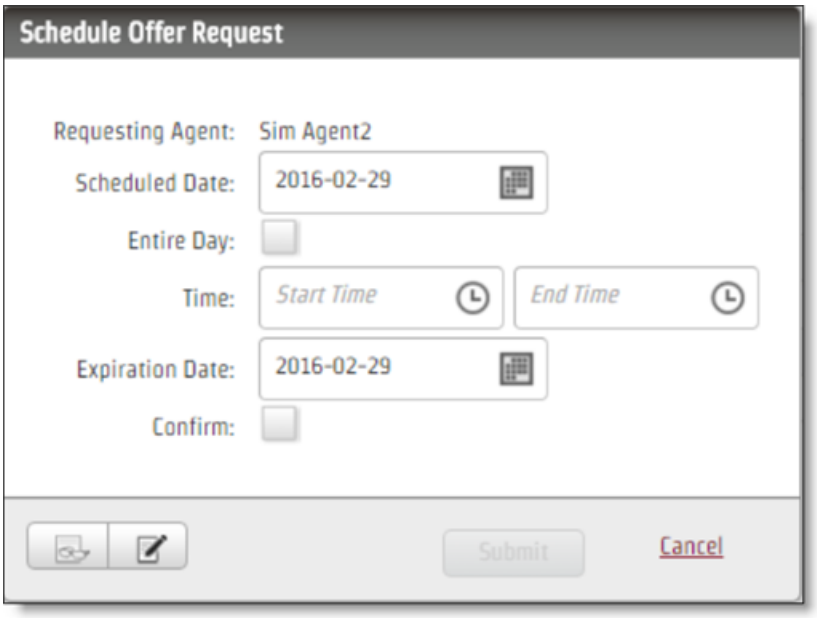


The following table describes the fields in the entire day Schedule Offer Request dialog box.

Field	Description
Requesting Agent	(read only) Your name.
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.
Entire Day	Select this check box to offer an entire day.

Field	Description
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.
Write Comment	Click to enter an optional comment (maximum of 250 characters) regarding the schedule offer request. Any comment you add is not saved until the schedule offer request itself is saved.

This image shows a request for a partial day schedule offer.



The following table describes the fields in the partial day Schedule Offer Request dialog box.

Field	Description
Requesting Agent	(read only) Your name.
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.
Entire Day	Clear this check box to offer a partial day.
Time	Enter the start and end times of the hours you want to offer to another agent.

Field	Description
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.
Write Comment	Click to enter an optional comment (maximum of 250 characters) regarding the schedule offer request. Any comment you add is not saved until the schedule offer request itself is saved.

To create a new schedule offer request:

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

A schedule offer request without confirmation flows through the system as outlined in the following table.

User	Action	Shows Up Here	Status
Agent A	Creates new request	Agent A Outbox	Pending
All agents	Receive offer	Agents' Public Box	Not applicable
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 the following table.

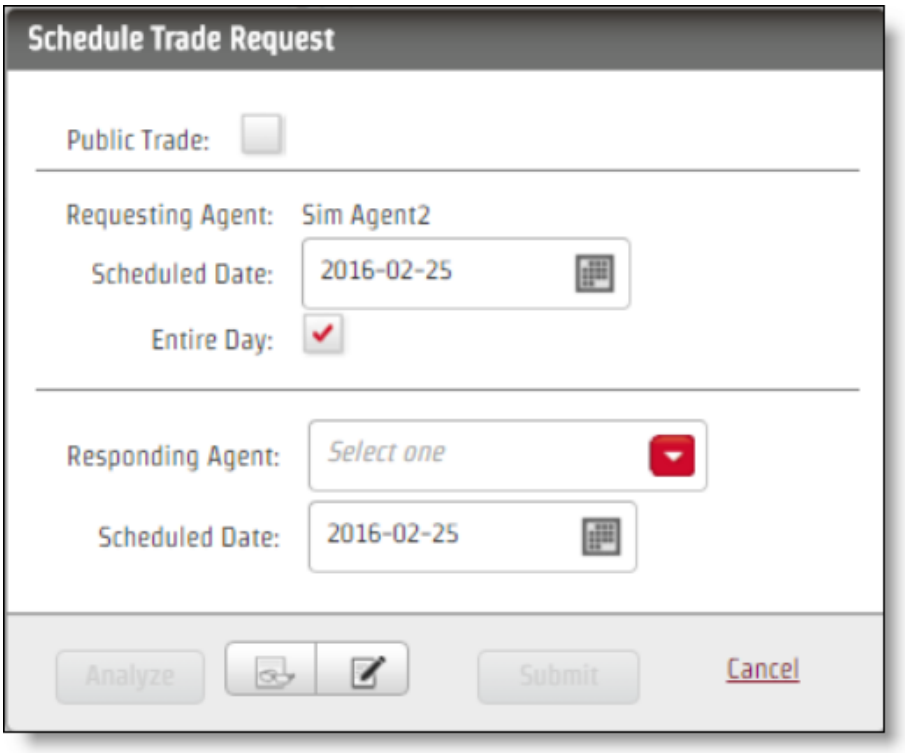
User	Action	Shows Up Here	Status
Agent A	Creates new request	Agent A Outbox	Pending

User	Action	Shows Up Here	Status
All agents	Receive offer	Agents' Public Box	Not applicable
Agent B	Accepts offer	Agent B Inbox	Pending
Agent A	Receives accepted offer	Agent A Outbox	To-Do
		Agent B Inbox	Pending
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

Requesting a Schedule Trade

Use the schedule trade request to trade an entire or partial scheduled work day with someone else's whole or partial 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).

This image shows a request for an entire day schedule trade.

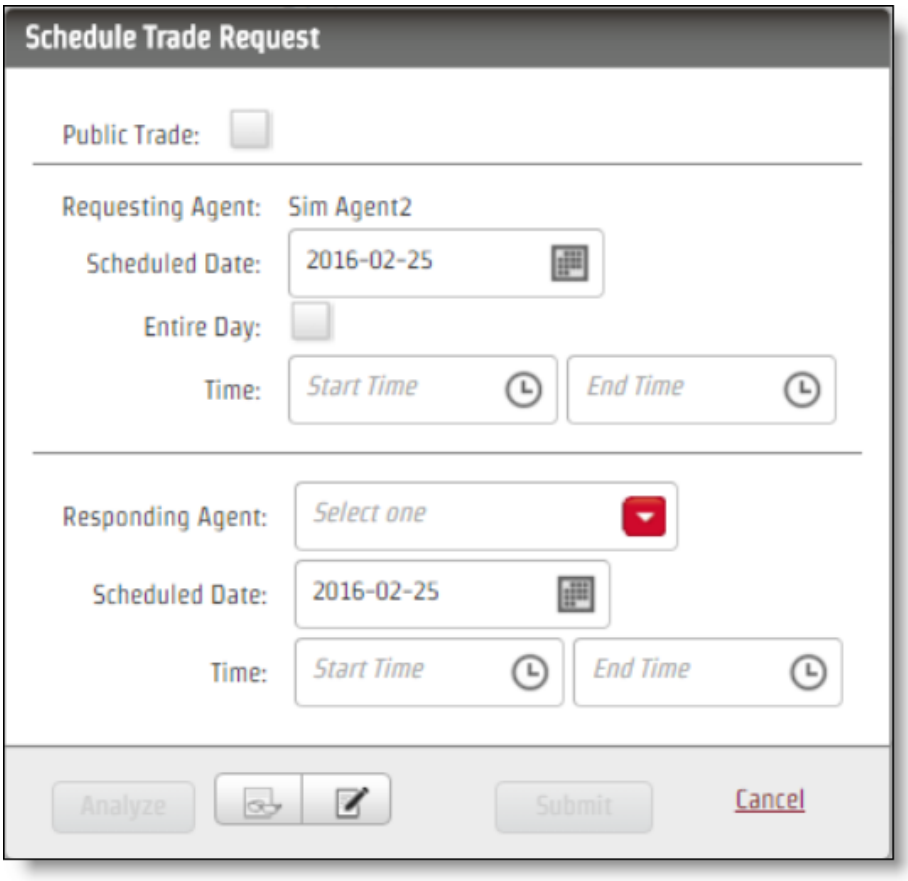


The following table describes the fields in the entire day Schedule Trade Request dialog box.

Field	Description
Public Trade	Select this check box to post your schedule trade in the Public Box of all agents in your view. Clear this check box to trade with a specific agent in a private trade.
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.
Requesting Agent	(Read only) Your name.
Scheduled Date	The date you want to trade. By default it displays tomorrow's date.
Entire Day	Select this check box to trade an entire day.
Responding Agent	(Private trades only) The agent you want to trade shifts with.
Scheduled Date	(Private trades only) The date you want to trade with.
Expiration Date	(Public trades only) The date the request expires.

Field	Description
Write Comment	Click to enter an optional comment (maximum of 250 characters) regarding the exception request. Any comment you add is not saved until the exception request itself is saved.

This image shows a request for a partial day schedule trade.



n en

The following table describes the fields in the partial day Schedule Trade Request dialog box.

Field	Description
Public Trade	Select this check box to post your schedule trade in the Public Box of all agents in your view. Clear this check box to trade with a specific agent in a private trade.
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.

Field	Description
Requesting Agent	(Read only) Your name.
Scheduled Date	The date you want to trade. By default it displays tomorrow's date.
Entire Day	Clear this check box to trade a partial day.
Time	Enter the start and end times of the hours you want to trade.
Responding Agent	(Private trades only) The agent you want to trade shifts with.
Scheduled Date	(Private trades only) The date you want to trade with.
Time	(Private trades only) Enter the start and end times of the hours you want to trade with.
Expiration Date	(Public trades only) The date the request expires.
Write Comment	Click to enter an optional comment (maximum of 250 characters) regarding the trade request. Any comment you add is not saved until the trade request itself is saved.

To create a new schedule trade request:

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.

A private schedule trade request flows through the system as outlined in the following table.

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

User	Action	Shows Up Here	Status
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

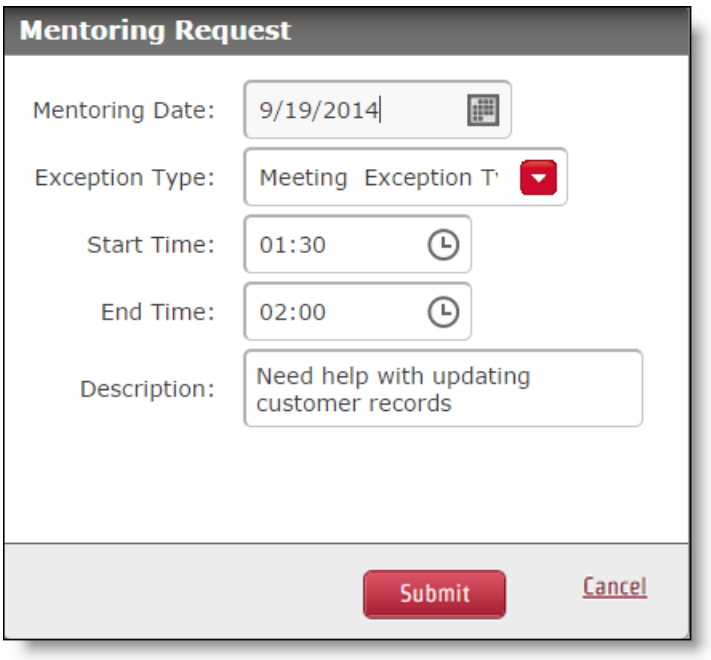
A public schedule trade request flows through the system as outlined in the following table.

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	Not applicable
Agent B	Accepts trade request	Agent B Inbox	Pending
Agent A	Receives Agent B's answer	Agent A Outbox	To-Do
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 con-firmation/rejection	Agent B Inbox	Submitted/denied
Supervisor	Receives accepted and confirmed trade request for approval	Supervisor To-Do Box	To-Do

User	Action	Shows Up Here	Status
Supervisor	Approves/denies trade	Agent A Outbox	Approved/Denied
		Agent B Inbox	Approved/Denied
		Supervisor All Box	Approved/Denied

Requesting Mentoring

Use a mentoring request to ask for one-on-one coaching from a fellow agent. All mentoring requests are posted in the Public Box, and any agent can respond. A supervisor, scheduler, or administrator must approve the mentoring request. When the request is approved the exception is added to your schedule and to your mentor's schedule.



The following table describes the fields in the Mentoring Request dialog box.

Field	Description
Mentoring Date	The date on which you want to schedule the mentoring session.
Exception Type	Select the appropriate exception from the drop-down list.
Start Time	The start time of the mentoring session.
End Time	The end time of the mentoring session.
Description	A description of the purpose for the mentoring session. The description can be a maximum of 251 characters.

To create a new mentoring request:

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

A mentoring request flows through the system as outlined in the following table.

User	Action	Shows Up Here	Status
Agent A	Creates new request	Agent A Outbox	Pending
All Agents	Sees request in Public Box	Agents' Public Box	Not applicable
Agent B	Accepts mentoring request	Agent B Inbox	Pending
Agent A	Receives Agent B's answer	Agent A Outbox	To-Do
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 mentoring request for approval	Supervisor To-Do Box	To-Do
Supervisor	Approves/denies mentoring request	Agent A Outbox	Approved/Denied
		Agent B Inbox	Approved/Denied
		Supervisor All Box	Approved/Denied

Requesting Dynamic Availability

You request dynamic availability using the My Availability page. See My Availability for Agents for more information.

Messaging for Supervisors, Schedulers, and Administrators

The Messaging application for supervisors, schedulers, and administrators 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

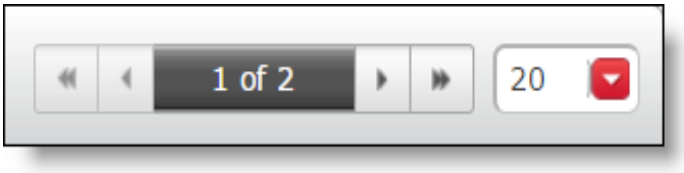
Requests can be retained from 6 to 99 months in the All Box, with the default retention period set to 13 months.

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

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. These controls help you navigate through the multiple pages of your mailboxes.



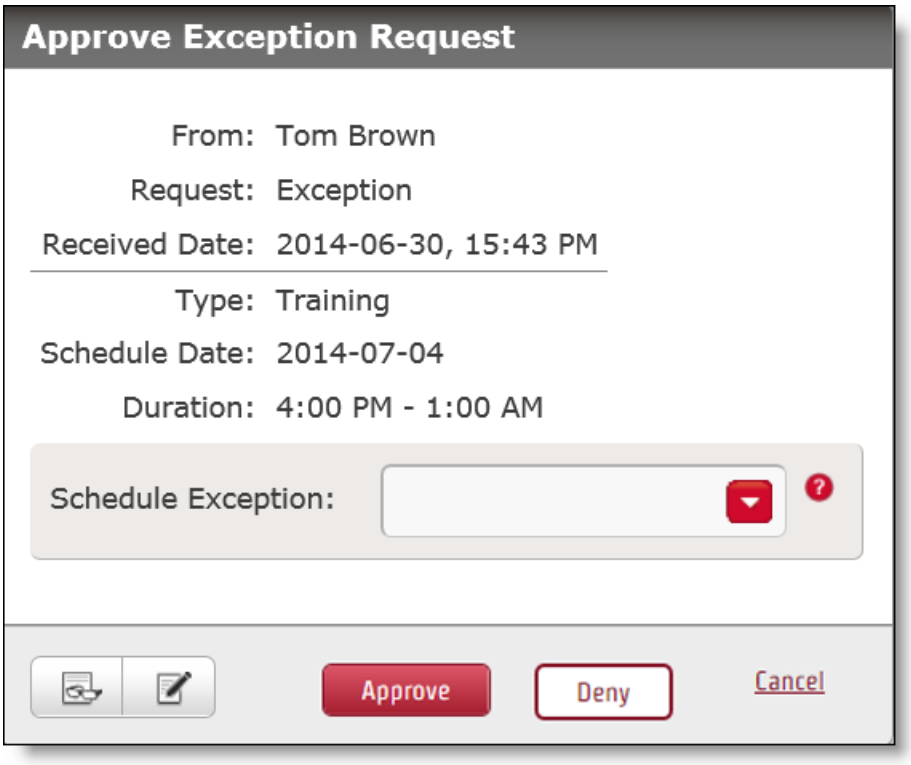
Use the single arrows to move backward and forward one page at a time and the double arrows to move to the beginning or end page in the mailbox. Control the number of requests displayed in one page using the drop-down list at the right. You can select one of the standard numbers (20, 40, 60, or 80) or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

Jump to a specific page by clicking 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 Exception Requests

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

Note: Workflows can be configured to automatically approve or deny requests. See *Workflows* for more information on this process.



NOTE: For entire day requests, an exception is placed on the schedule over any paid activities in shifts that start on that day (regardless of whether the exception is paid or not paid) . Any unpaid activities in those shifts are replaced with a Not Available activity in the schedule. If the agent does not have a shift on that day, then the exception is not added to the agent's schedule.

For partial day requests, an exception is placed on the schedule for the requested time period over any existing paid activities during that time period (regardless of whether the exception is paid or not paid) . Any overlapping unpaid activities in those shifts are replaced with a Not Available activity in the schedule. For example, if an exception partly covers an unpaid lunch, the part that is not overlapping remains a lunch. The part that overlaps with the exception is replaced with Not Available. If the agent does not have any existing paid activities during that

time period, then the exception is not added to the agent's schedule.

Exception requests are handled this way to ensure that the paid time for the day remains the same before and after the exception is applied.

The following table describes the fields in the Approve Exception Request dialog box.

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.
Schedule Date	The date of the exception.
Duration	The duration of the exception. **Note**: If you approve an all-day exception on a day the agent is scheduled with unpaid activities, those unpaid activities are replaced with "Not Available". Paid activities are overwritten by the exception. This ensures that the paid time for the day remains the same before and after the exception is applied.
Schedule Exception	Select the exception description that will appear in the schedule if the exception is approved.

To approve or deny an exception request:

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 Comment if any comments are attached to the exception request. You can also type a comment, if desired.
3. Click Approve or Deny.

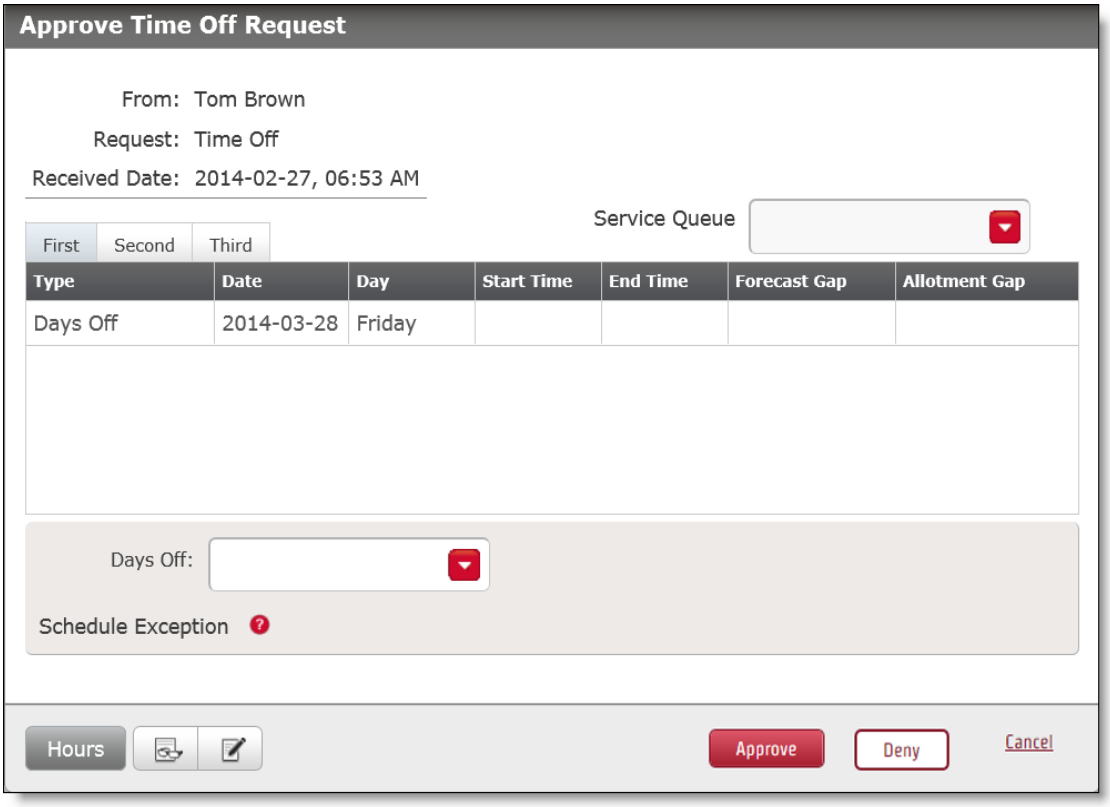
Note: If the exception you assign to the request when approving it has been mapped to one of the standard time off types on the Vacation Type Mapping page (Personal Days, Days Off,

Floating Holiday, or Vacation), then the duration of the exception will be subtracted from the agent's available time off, the same as if the agent had submitted a Time Off request.

Approving or Denying Time Off Requests

The Approve Time Off Request dialog box enables you to approve or deny an agent's time off request.

Note: Workflows can be configured to automatically approve or deny requests. See *Workflows* for more information on this process.



The following table describes the fields in the Approve Time Off Request dialog box.

Field	Description
From	The name of the agent requesting time off.
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.

Field	Description
Service Queue	Select the appropriate service queue from the drop-down list. This service queue is used to determine the Forecast Gap and Allotment Gap, and from which allotments are removed. See the Allotment Gap description for an explanation on how allotments are calculated.
First, Second, Third tabs	Tabs that display the first, second, and third choices for time off requested by the agent.
Type	The type of time off request.
Date	The date of the requested time off.
Day	The day of the week of the requested time off.
Start Time	The start time of the requested time off.
End Time	The end time of the requested time off.
Forecast Gap	The difference in FTEs between the number of scheduled agents and the number of forecasted agents in the current forecast for the service queue selected. You can use this number as a guide for determining if there is enough coverage that day to grant the time off request. Note: There is a value in this field only if a service queue was selected and a forecast has been generated for the service queue for that date.

Field	Description
Allotment Gap	The available FTEs allotted for time off on the requested day. **Note**: There is a value in this field only if a service queue was selected and the service queue has a time off allotment configured for the date. Time off allotments are computed as follows: 1. Configured time off allotments are specified as a number of FTE agents. The hours per day for each FTE is taken from the global setting “Default FTE Per Day”. 2. When time off is approved, the supervisor indicates which service queue the allotments are taken from. 3. For an entire day time off request, the FTE is computed using the Minimum Hours Per Week in the agent FTE Profile divided by 5 days per week. For example, if the global Default FTE per Day is 8 hours, and the agent FTE profile Minimum Hours Per Week is 20 hours, then a full day time off request for that agent is 0.5 FTEs (20 ÷ 5 = 4 hours per day, and 4 ÷ 8 = 0.5 FTEs).
Schedule Exception	Select the exception that will appear in the schedule if the time off is approved. The exceptions available are the ones configured in the Vacation Type Mapping for the request type.

To approve or deny a time off request:

1. Double-click the request to open it.
2. Select the appropriate service queue from the drop-down list.
3. Click the First, Second, and Third tabs to view the agent's ranked time off requests.
4. If desired, click Hours to view a summary of the agent's total, used, approved, pending, and remaining time off hours. Click Read Comment to view any comments that are attached to the request.
5. If you decide to deny the request, click Deny.
6. If approving the request, select the appropriate schedule exception from the drop-down

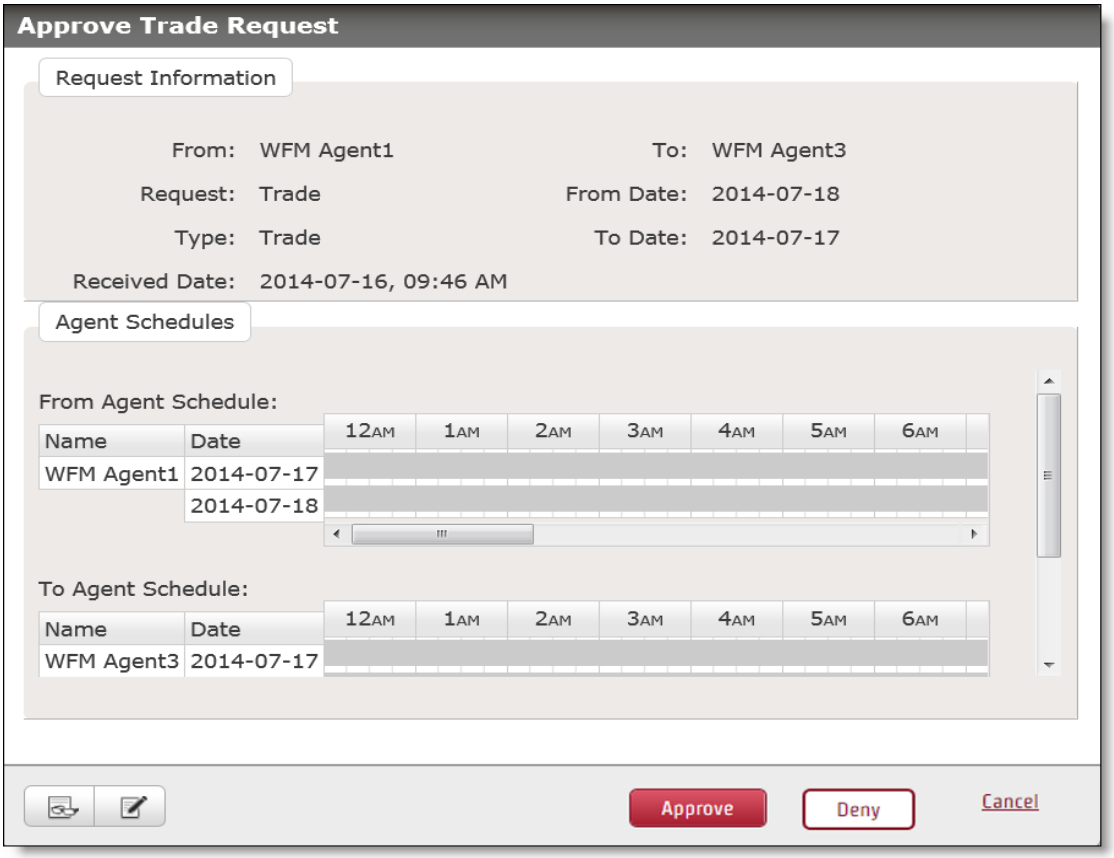
list. This is what appears in the schedule.

7. Click the choice tab for the request you want to approve, and then click Approve.

Approving or Denying Schedule Trade or Offer Requests

The Approve Trade Request dialog box allows you to analyze, and then approve or deny a trade request or an offer request. The same dialog box is used for both trades and offers.

Note: Workflows can be configured to automatically approve or deny requests. See *Workflows* for more information on this process.



The following table describes the fields in the Approve Trade Request dialog box.

Field	Description
From	The name of the agent who requested the trade.
Request	The Trade high-level request type.
Type	The type of trade request.

Field	Description
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.
Availability	Indicates if the From agent's schedule fits into the To agent's schedule.
Service Queue	Indicates if the two agents support the same or different service queues.
Teams	Indicates if the two agents belong to the same or different teams.
Overlapping Shifts	Indicates if the two agents have overlapping shifts.
Time Zone	Indicates if the two agents are in the same or different time zone.
Skill Mapping	Indicates if the two agents belong to the same or different skill mapping.
Exception	Indicates if either agent's schedule includes an exception.

To approve or deny a schedule trade or offer request:

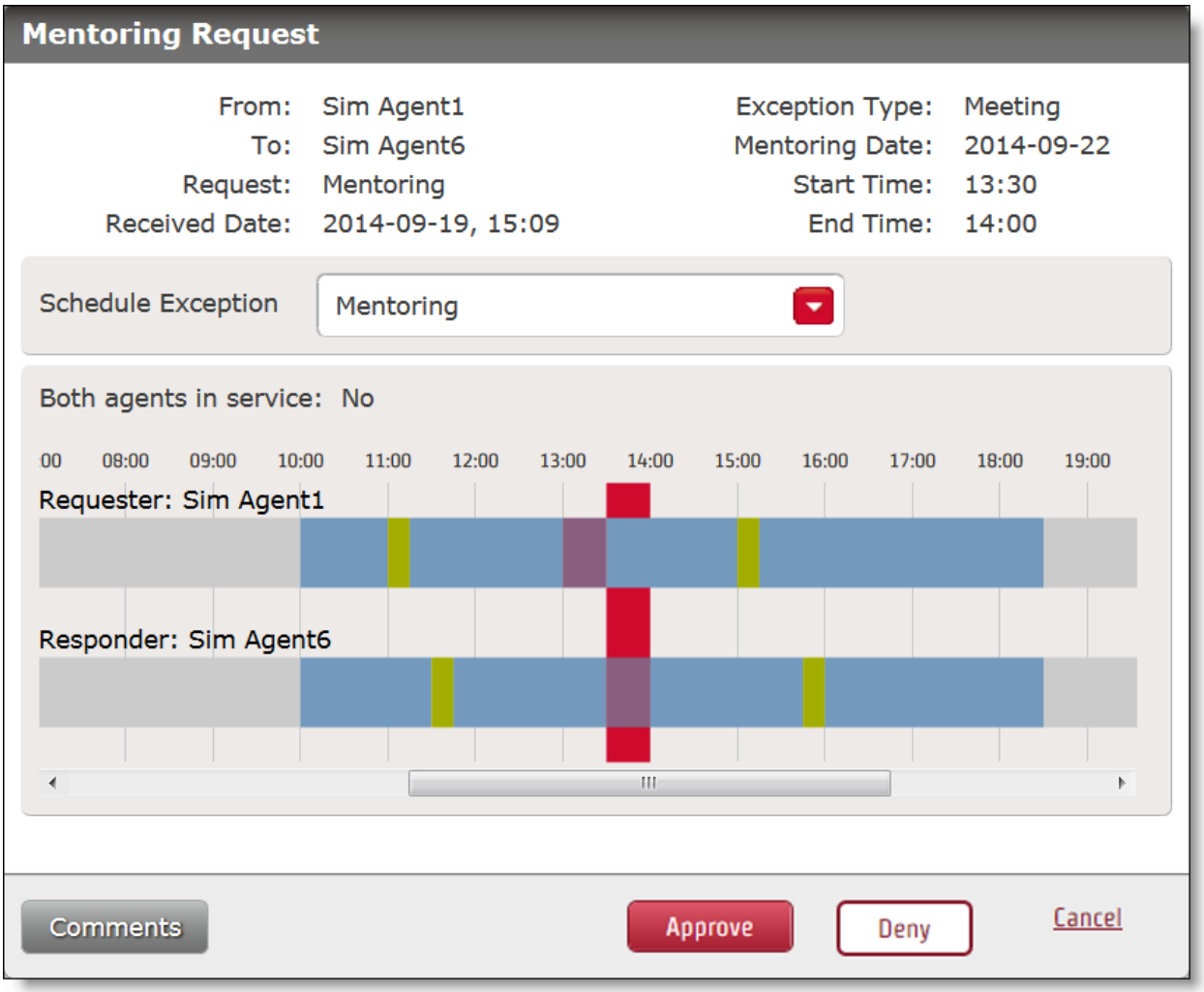
1. In the To-Do Box, double-click the request to open it.
2. Use the Agent Schedules section to analyze the two schedules to make sure they can be traded. Click Read Comment if any comments are attached to the trade or offer request.
3. Click Approve or Deny.

Note: Once a schedule offer or trade is approved, range-based general work conditions are compared to each of the resulting schedules, or, if the trade splits a schedule, to each of the resulting "sub-schedules". If no work condition is found to match the length of a post-trade schedule or sub-schedule, no break or lunch will be assigned.

Approving or Denying Mentoring Requests

The Approve Mentoring Request dialog box allows you to analyze and then approve or deny a mentoring request.

Note: Workflows can be configured to automatically approve or deny requests. See *Workflows* for more information on this process.



The following table describes the fields in the Approve Mentoring Request dialog box.

Field	Description
From	The name of the agent who requested the mentoring.
Exception Type	The exception type chosen by the agent making the request.
To	The name of the agent who accepted the mentoring request.

Field	Description
Mentoring Date	The date of the mentoring session.
Request	The type of request.
Start Time	The start time of the mentoring session.
Received Date	The date and time the request was submitted.
End Time	The end time of the mentoring session.
Schedule Exception	The exception that will appear in the agents' schedules.
Both agents in service	Yes/No. Indicates if both the requesting and accepting agent is or is not in service during the proposed mentoring time slot.

To approve or deny a mentoring request:

1. In the To-Do Box, double-click the request to open it.
2. Review the details of the mentoring request. Click Comments if any comments are attached to the mentoring request.
3. Click Approve or Deny.

   If you approve the request, both agents' schedules are updated immediately to show the mentoring session.

Approving or Denying Dynamic Availability Requests

The Approve Dynamic Availability Request dialog box enables you to approve or deny an agent's availability request. There are other ways to approve or deny these requests. See My Availability for Administrators, Schedulers, and Supervisors for more information.

Reporting

The Reporting application contains reports for all the products you are logged into. The reports that you can access are determined by your role.

Reporting Roles and Scope

Your role determines which reports you can access. If you are assigned multiple roles (for example you are both a supervisor and an agent), you will have access to the reports available to each of those roles.

Role	Scope
Agent	Reports that pertain only to the agent
Supervisor	Reports for the agents, teams, projects, work conditions, work shifts, and exceptions within the supervisor's view
Scheduler	Reports for the service queues, skill mappings, teams, projects, work conditions, work shifts, and exceptions within the scheduler's views
Administrator	All reports

Running a Report

To run a report:

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

> **Note:** Reports appear in a different tab. If your browser popup blocker is still enabled, you need to allow the popup for the IP address in order for the report to be displayed.

Customizing the Report Logo

Reports output in HTML, PDF, and XLS format contain a logo in the upper left corner next to the report title.

An administrator can customize the logo by replacing the default logo with a new logo. This is done in the WFM Configuration Setup (postinstall.exe) utility.

For information on how to customize the report logo, see “Customizing the Report Logo” in the *WFM Installation Guide*.

Points to Remember

When running reports, remember the following points:

- Some values in reports are calculated values, and subject to rounding up or down. Because of this rounding, they might differ slightly from historical data values.

  When you save a report, the settings are saved for that report. For example, you can save a report for one service queue, and then modify the report and save it for another service queue.

- Some reports allow you to choose the fields that appear in the report and the order in which those fields appear. When you click Run Report or Save As, the selected fields become the default fields for the report.

- If enabled, supervisors, schedulers, and administrators can schedule a report to run on a recurring basis and specify when to run the report. The report is sent by email to specified email addresses.

- The email for a scheduled report includes the email address of the user who scheduled the report in the From field. If the user’s email address is not available, the email address will be <First name>.<Last name>@automated.report. Where <First name> and <Last name> is the name of the user.

Adherence and Conformance Calculations in Reports

Real-time adherence and conformance calculations can be complex and time consuming, particularly in the context of reporting against multiple agents over multiple days.

Because of this, reporting uses precalculated values for adherence and conformance.

The ACC service computes these values once per day at a user-configurable time. It is recommended that this is done during off-peak hours and before reports are run.

The number of days in the past to compute (or recompute) adherence and conformance values is also configurable. It is recommended that this is done for as many days back in the past as schedule edits

for adherence and conformance are done. For example, if supervisors are making schedule edits as much as seven days in the past, and you want those edits to be reflected in adherence and conformance calculations, then update the setting to seven days. See *Recalculating Data for Agent and Team Performance Reports* for more information.

Since the reports are using daily precomputed values for adherence and conformance, these values in reports might lag behind any schedule edits or configuration changes to adherence state mappings since the last computation was done.

Adherence and Conformance Rollup Calculations

For each agent and each day, the adherence calculation is as follows:

$$\text{adherence \%} = \frac{\text{configured scheduled adherence minutes} - \text{minutes not in adherence}}{\text{configured scheduled adherence minutes}} \times 100$$

See *Adherence State Mappings* for information on how to configure which scheduled activities count towards an adherence score.

For each agent and each day, the conformance calculation is as follows:

$$\text{conformance \%} = \frac{\text{total time an agent is in a ready, talk, hold, or work state}}{\text{current scheduled in-service time}} \times 100$$

In some reports, adherence and conformance values are “rollups” (cumulative totals) over multiple days or multiple agents, such as the adherence percentage values on the Total or Grand Total line of a report.

Starting with version 9.2, the raw values for the numerator and denominator are stored in the WFM database. Prior to version 9.2 only the adherence percentage and conformance percentage values were stored. This allows WFM to do rollups across multiple agents, teams, and days that use the same adherence and conformance formulas shown above. Previously, adherence and conformance for multiple agents, teams, and days would have computed as a simple average of the daily agent adherence and conformance values, each value being weighted equally.

A rollup calculation of Adherence % for an agent when viewing agent data for an entire week is as follows:

$$\text{adherence \%} = \frac{\text{configured scheduled adherence minutes} - \text{minutes not in adherence}}{\text{configured scheduled adherence minutes}} \times 100$$

If any of the adherence percentage or conformance percentage values in a report were computed before upgrading to version 9.2, then any rollups are done using a simple average. This is because the

raw numerator and denominator does not exist for old data, meaning a weighted calculation cannot be done.

An example of the simple average calculation is as follows:

$$\text{adherence \%} = \frac{\text{Mon adherence \%} + \text{Tues adherence \%} + \text{Wed adherence \%} \ldots}{\text{7 days}}$$

Recalculating Data for Agent and Team Performance Reports

It might become necessary to correct a schedule for a past day and recompute adherence and conformity calculations so that agent and team productivity statistics are correct.

The WFM Adherence Conformity Calculator (ACC) service processes data from the daily schedule and agent status table and computes the adherence and conformance percentages for historical productivity reports every day.

You can configure WFM to recalculate adherence and conformance for a specified number of days in the past using WFM Configuration Setup (Postinstall) on the Enterprise Settings step. This can become necessary if you make changes in a past schedule and need to recompute data. See “Enterprise Settings Step” in the *WFM Installation Guide* for more information.

WFM Reports

The reports available in WFM are listed below.

Agent and Team Performance Reports

- *Agent and Team Productivity Report*

Service Queue Performance Reports

- *Agent Interval Report*
- *Agent Service Queue Interval Report*
- *Interval Service Queue Report*
- *Service Queue Agent Interval Report*
- *Team Agent Interval Report*
- *Team Interval Report*

Schedule View Reports

- *Assigned and Scheduled Exceptions Report*
- *Agent Overtime Report*

- *Agent Schedule Daily Report*
- *Agent Schedule Weekly Report*
- *Agent Task Percentages Report*
- *Service Queue Schedule By Agent Report*
- *Service Queue Schedule By Interval Report*
- *Team Schedule Task Hours Report*

Performance Analysis Reports

- *Agent Report Card*
- *Performance Daily Report*
- *Performance Interval Report*

Audit Trail Reports

- *Audit Trail Report*

Agent and Team Productivity Report

This is an Agent and Team Performance report.

The Agent and Team Productivity report displays the agent's or team's productivity statistics over a selected date range, by day, week, or month. Statistics are reported only for time periods during which the agent is logged in or for when your ACD reports data.

To display the report, you must select:

- Team or Team and Agent (not available for the Agent role)
- Date(s)
- Group Dates By (Day, Week, or Month)
- Format

Note: If you just select one or more teams, then a Team Productivity Report is produced. If you select one or more teams and one or more agents, then an Agent Productivity Report is produced.

You can also select which fields to display, except for Agent or Team, which are required. By default, all fields are selected.

The following are the fields that you can select to appear in the report. You can customize the order in which the fields appear from left to right.

ACD ID

Adherence %

Average Handle Time

Average Hold Time

Average Not Ready Time

Average Ready Time

Average Talk Time

Average Work Time

Calls Handled

Calls Per Hour

Calls Transferred

Conformance %

Date

Occupancy %

Total Handle Time

Total Hold Time

Total In Service Time

Total Login Time

Total Not Ready Time

Total Ready Time

Total Talk Time

Total Work Time

Utilization %

Agent Interval Report

This is a Service Queue Performance report.

The Agent Interval report displays the selected agents' activity over half-hour intervals on a selected date.

To display the report, you must select:

- Scope (team or skill mapping)
- Team or skill mapping
- Agents

- Date(s)
- Format

You can also select which fields to display, except for Agent and Interval, which are required. By default, all fields are selected.

The following are the fields that you can select to appear in the report. You can customize the order in which the fields appear from left to right.

Average Handle Time

Average Talk Time

Average Work Time

Busy Other State Time

Calls Answered

Call Handled

Date

In Service Time

Occupancy %

Ready State Time

Utilization %

Agent Overtime Report

This is a Schedule View report.

The Agent Overtime report displays the number of overtime hours worked by selected agents in selected teams or service queues over a selected date range.

To display the report, you must select:

- Scope (team or skill mapping)
- Team or skill mapping
- Agent
- Date(s)
- Format

You can also select which fields to display, except for Agent Name and Date, which are required. By default, all fields are selected.

The following are the fields that you can select to appear in the report. You can customize the order in which the fields appear from left to right.

Duration

End Time

Start Time

Username

Agent Report Card

This is a Performance Analysis report.

The Agent Report Card report displays performance information for a selected date range; agents, teams, or teams and agents; and team or skill mapping.

You must select the following to display the report:

- Scope (agent, team, or team agent)
- Filter By (team or skill mapping)
- Team
- Agent
- Evaluation form
- Goal metrics
- Date(s)
- Format

If is installed and if WFM is configured to import evaluation form information, the Evaluation Form drop-down list displays a list of the evaluation forms used in to evaluate agent performance. You must select an evaluation form from this list. The data in the Agent Report Card will reflect only data from agent evaluations using the selected evaluation form and meeting all other report selection criteria.

The goal metrics section displays the default field values set for the following statistics.

Statistic	Default Value
Average Quality Score	75
Average Calls Per Hour	10
Adherence %	75
Conformity %	0
Occupancy %	0
Utilization %	0
Average Handle Time	0

Statistic	Default Value
Average Talk Time	0
Average Work Time	0
Average Hold Time	0
Average Ready Time	0

You can modify these goals as desired. When the Agent Report Card is generated, the agent's or team's performance against these goals is indicated. The values displayed are weighted averages.

You can also select which fields to display, except for Agent and Team, which are required. By default, all fields are selected.

The following are the fields that you can select to appear in the report. You can customize the order in which the fields appear from left to right.

Adherence %

Average Calls Per Hour

Average Handle Time

Average Hold Time

Average Quality Score

Average Ready Time

Average Talk Time

Average Work Time

Conformance %

Occupancy %

Utilization %

Note: The values for Adherence % and Conformity % in this report for dates before WFM 9.2 was installed are based on data calculated before adherence/conformance calculation enhancements were made. As a result, these values are simple averages and not weighted averages.

Agent Schedule Daily Report

This is a Schedule View report.

The Agent Schedule Daily report details selected agents' scheduled activities by day for a selected date range.

To display the report, you must select:

- Scope (team or skill mapping)
- Team or skill mapping
- Agent
- Date(s)
- Format

You can also select which fields to display, except for Agent Name and Date, which are required. By default, all fields are selected.

The following are the fields that you can select to appear in the report. You can customize the order in which the fields appear from left to right.

Activity Duration

Activity End Time

Activity Start Time

Activity Type

Activity Type Details

Agent Schedule Weekly Report

This is a Schedule View report.

The Agent Schedule Weekly report details selected agents' scheduled activities by week starting on a selected date.

To display the report, you must select:

- Scope (team or skill mapping)
- Team or skill mapping
- Agent
- Date(s)
- Format

You can also select which fields to display, except for Agent Name, Agent Number, Arr (arrival time), and Dep (departure time), which are required. By default, all fields are selected.

The following are the fields that you can select to appear in the report. You can customize the order in which the fields appear from left to right.

In Service Hours

Paid Hours Assignment

Paid Hours Break

Paid Hours Closed Service

Paid Hours Exception

Paid Hours Lunch

Paid Hours Project

Paid Hours Total

Agent Service Queue Interval Report

This is a Service Queue Performance report.

The Agent Service Queue Interval report displays agent activity for selected agents in selected service queues over half-hour intervals on a selected date.

To view the report, you must select:

- Scope (team or skill mapping)
- Team or skill mapping
- Agents
- Date(s)
- Format

You can also select which fields to display, except for Agent, Interval, and Service Queue, which are required. By default, all fields are selected.

The following are the fields that you can select to appear in the report. You can customize the order in which the fields appear from left to right.

Average Handle Time

Average Talk Time

Average Work Time

Calls Answered

Calls Handled

Date

Agent Task Percentages Report

This is a Schedule View report.

The Agent Task Percentages report displays selected agents' activities in terms of percentages of total work time for selected agents over a selected date range, by day, week, or month.

To display the report, you must select:

- Scope (team or skill mapping)
- Team or skill mapping
- Agent
- Date(s)
- Group dates by (day, week, month)
- Format

You can also select which fields to display, except for Agent Name and Date, which are required. By default, all fields are selected.

The following are the fields that you can select to appear in the report. You can customize the order in which the fields appear from left to right.

Percent Assignment

Percent Break

Percent Closed

Percent Exception

Percent In Service

Percent Lunch

Percent Overtime

Percent Project

Username

Assigned and Scheduled Exceptions Report

This is a Schedule View report.

The Assigned and Scheduled Exceptions report displays all occurrences of exceptions assigned to or scheduled for selected agents over a selected date range.

- An assigned exception is an exception that is assigned to an agent before a schedule is run, and then is applied to the schedule when it is run.
- A scheduled exception is an exception that actually appears in an agent's schedule, and can have been assigned to the agent before or after the schedule was run.

In many cases assigned exceptions match scheduled exceptions, but not always.

Note: It is possible to have all-day exceptions on dates for which schedules have not yet been run. If that is the case, then the Start, End, and Duration fields for those exceptions will be

empty. Once a schedule has been run for those dates, the report will display values in those fields.

To display the report, you must select:

- Type (assigned or scheduled)
- Scope (team or skill mapping)
- Team or skill mapping
- Agent
- Exception (assigned exception type only)
- Date(s)
- Format

You can also select which fields to display, except for Last Name and First Name, which are required. By default, all fields are selected.

The output for the report is similar when you choose either the assigned or scheduled exception type. However, when you choose scheduled exceptions, there are the following differences:

- The Entire Day field does not appear in the report.
- You cannot choose to display results for specific exceptions. Instead, all scheduled exceptions for the selected agents are displayed in the report.

The following are the fields that you can select to appear in the report. You can customize the order in which the fields appear from left to right.

Agent ID

Date

Duration

End

Entire Day

Exception

Start

Audit Trail Report

The Audit Trail report displays a record of actions taken in selected functional areas of WFM for selected users. These include:

- Schedule edits via Agent Schedules
- Schedule runs
- Forecast edits
- Distribution edits
- User edits

Effective with the release of WFM 9.5(1) SR2, min/max hour violations via schedule trade, offer, exception, time off, mentoring approval, and Agent Schedules editing overrides were added to the Audit Trail report.

To display the report, you must select:

- Area
- Action
- User
- Date(s)
- Format

Note: The length of time audit data is retained is configured on the Data Retention step in WFM Configuration Setup, and as a result you might not be able to obtain audit trail information for the period you select. Refer to "Configuring WFM" in the *Workforce Management Installation Guide* for more information.

The following fields are displayed in the Audit Trail report. The data is sorted by date/time in descending order.

Field	Description
Date	The date of the action.
Time	The time of the action.
User	The user who performed the action.
Area	The functional area of WFM
Action	The action taken in the functional area.
Description	A full description of the action taken.

Budgetary Planning Report

This is a Strategic Planning report.

The Budgetary Planning report displays the estimated wage cost per role for the identified time frame.

In order to run this report, you must already have a strategic forecast generated for the service queue.

The human resources displayed in this report are configured on the *Strategic Forecasts* page. No matter how the resource cost is configured (monthly, yearly, or as a one-time expenditure) on the Strategic Resources page, the value is converted to a monthly cost. This value is used in calculating this report.

How the report is calculated

The number of each human resource type to be planned for any given month equals (forecasted agent count for the month) × (resource ratio of the base resource to the agent resource) × (resource ratio for this resource) × (resource cost)

> **Example:** If there is 1 supervisor for every 10 agents, and 1 manager for every 2 supervisors and the cost per manage is $5,000, then the formula to compute the cost of managers needed in a month where the forecasted number of agents is 100 is:
>
> 100 × (1/10) × (1/2) × 5000 = $25,000

To view the report, you must select:

- Service queues
- Start year
- End year
- Start month
- End month
- Format

The fields that appear in the report depend on the human resources that are configured on the Strategic Resources page. You cannot customize the order in which the fields appear.

Facility Planning (hardware) Report

This is a Strategic Planning report.

The Facility Planning (hardware) report displays the capital items (equipment, furniture, and fixtures) that are projected to be used by the select service queue during the selected date range.

The capital items displayed in this report are configured on the *Strategic Forecasts* page.

In order to run this report, you must already have a strategic forecast generated for the service queue.

How the report is calculated

The number of a capital item to be planned for any given month = (forecasted agent

count for the month) × (resource ratio of the base resource to the agent resource) × (resource ratio for this resource)

Example: If there is 1 supervisor for every 10 agents, and 1 phone for every 2 supervisors, then the formula to compute the number of phones needed in a month where the forecasted number of agents is 100 is:

100 × (1/10) × (1/2) = 5 phones

To view the report, you must select:

- Service queues
- Start year
- End year
- Start month
- End month
- Format

The fields that appear in the report depend on the capital items that are configured on the Strategic Resources page. The Month field is required. You cannot customize the order in which the fields appear.

Hiring Plan Report

This is a Strategic Planning report.

The Hiring Plan report displays the projected number of employees required to be at each hiring stage to meet required staffing levels during the identified time frame.

- The human resources displayed in this report are configured on the *Strategic Forecasts* page.
- In order to run this report, you must already have a strategic forecast generated for the service queue.
- The current resource count from the Strategic Resources page is used as the starting point in the report.
- The attrition value you enter as part of the report request is applied to the current resource count. The difference between this computed value and the forecasted resource requirement for the month in the hiring plan is the resource gap that needs to be filled by the hiring plan.

- The attrition rate for each of the hiring steps is applied. Working backwards from this figure, the required resource count at the beginning of each step is calculated.

To view the report, you must select:

- Service queues
- Strategic resource
- Hiring plan (configured on the Hiring Plans page)
- Target year
- Target month
- Attrition rate (the current attrition rate of the contact center)
- Format

The following are the fields that appear in the report. You cannot customize the order in which the fields appear.

Attrition Rate

Duration

End Date

FTE

Start Date

The report also contains the following summary information in the header:

- Target FTE: The FTE calculated for the selected time period by your strategic plan.
- Available FTE (after attrition based on current count): The available FTE calculated for the selected time period by your strategic plan.
- FTE Gap: The difference between the Target FTE and the Available FTE.

Interval Service Queue Report

This is a Service Queue Performance report.

The Interval Service Queue report displays comprehensive statistics for selected service queues over half-hour intervals on a selected date.

To display the report, you must select:

- Service queue group
- Service queue
- Date

You can also select which fields to display. By default, all fields are selected.

The following are the fields that you can select to appear in the report. You can customize the order in which the fields appear from left to right.

Agents Actual

Agents Forecast

Agents Projected

Agents Scheduled

Agents Shrinkage

Average After Contact Work Time Actual

Average After Contact Work Time Forecast

Average Handle Time Actual

Average Handle Time Forecast

Average Speed of Answer Time Actual (interactive service queues only)

Average Speed of Answer Time Forecast (interactive service queues only)

Average Talk Time Actual

Average Talk Time Forecast

Calls Abandoned

Calls Answered

Calls Handled

Calls Reforecast

Calls Offered Actual

Calls Offered Forecast

Handled %

Interval

Maximum Contacts in Queue (non-interactive service queues only)

Occupancy % Actual

Occupancy % Forecast

Precision %

Seconds Service Level Scheduled (interactive service queues only)

Service Level % Actual (interactive service queues only)

Service Level % Forecast (interactive service queues only)

Service Level % Goal (interactive service queues only)

Service Level % Scheduled (interactive service queues only)

Service Level % Shrinkage (interactive service queues only)

Shrinkage %

Performance Daily Report

This is a Performance Analysis report.

The Performance Daily report displays statistics for selected service queues over a selected date range that describe the service queues' actual versus forecast performance and the forecast's accuracy.

To display the report, you must select:

- Service queue
- Date(s)
- Format

You can also select which fields to display, except for Service and Date, which are required. By default, all fields are selected.

The following are the fields that you can select to appear in the report. You can customize the order in which the fields appear from left to right.

Abandon % (interactive service queues only)

Average Handle Time Actual

Average Handle Time Forecast

Average Speed of Answer (interactive service queues only)

Calls Offered Actual

Calls Offered Forecast

Forecast Accuracy

Handle Time Accuracy

Maximum Contacts in Queue (non-interactive service queues only)

Service Level % Actual (interactive service queues only)

Performance Interval Report

This is a Performance Analysis report.

The Performance Interval report displays statistics for selected service queues over a selected date range that describe the service queue's actual versus forecast performance and the forecast's accuracy for each half-hour interval.

To display the report, you must select:

- Service queue
- Date(s)
- Format

You can also select which fields to display, except for Service, Date, and Interval, which are required. By default, all fields are selected.

The following are the fields that you can select to appear in the report. You can customize the order in which the fields appear from left to right.

Abandon % (interactive service queues only)

Agents Actual

Agents Actual – Agents Forecast

Agents Actual – Agents Scheduled

Agents Forecast

Agents Scheduled

Agents Scheduled – Agents Forecasted

Average Handle Time Actual

Average Handle Time Forecast

Average Speed of Answer (interactive service queues only)

Calls Offered Actual

Calls Offered Forecast

Forecast Accuracy

Handle Time Accuracy

Maximum Contacts In Queue (non-interactive service queues only)

Service Level % Actual (interactive service queues only)

Service Queue Agent Interval Report

This is a Service Queue Performance report.

The Service Queue Agent Interval report displays agent statistics for selected agents in selected service queues over half-hour intervals on a selected date.

You must select the following to display the report:

- Service queue
- Date(s)
- Format

You can also select which fields to display, except for Agent, Interval, and Service, which are required. By default, all fields are selected.

The following are the fields that you can select to appear in the report. You can customize the order in which the fields appear from left to right.

Average Handle Time

Average Talk Time

Average Work Time

Calls Answered

Calls Handled

Service Queue Schedule By Agent Report

This is a Schedule View report.

The Service Queue Schedule By Agent report displays agent schedules for a selected date, agent category, and service queue.

To display the report, you must select:

- Service queue
- Agent category
- Date(s)
- Format

The possible agent categories are:

- All Agents For Service
- Agents For Service With Available Time
- Agents Scheduled For Service

This report shows the hourly schedule for the selected day. Each agent's schedule is coded to show the activity scheduled for each hour. Coverage for each service queue is also shown.

Agent activity codes are as follows:

Code	Description
X	In service
B	Break
L	Lunch
A	Assignment

Code	Description
C	Closed service
P	Project
E	Exception
-	Not available
<blank>	Available but not scheduled

Service queue coverage codes are as follows:

Code	Description
–	Fewer agents scheduled in service than forecast requirements
*	Agents scheduled in service match forecast require-ments
+	More agents scheduled in service than forecast requirements

Service Queue Schedule By Interval Report

This is a Schedule View report.

The Service Queue Schedule by Interval report displays the schedule for selected service queues for a selected date by half-hour intervals.

To display the report, you must select:

- Service queue
- Date(s)
- Format

You can also select which fields to display, except for Service and Date, which are required. By default, all fields are selected.

The following are the fields that you can select to appear in the report. You can customize the order in which the fields appear from left to right.

Agents Forecast

Agents Scheduled

Agents Scheduled – Agents Forecasted

Assignment

Break

Closed

Exception

In Service

Interval

Lunch

Project

Total

Shift Budget Analysis Report

This is a Planning report.

The Shift Budget Analysis report displays the cost per shift for a service queue. You can only view this report for service queues for which you have previously submitted a Shift Budget Analysis Request.

To display the report, you must select:

- Service queue
- Start date
- End date
- Hourly rate (the wage rate you want to use in the report calculations)
- Format

The following are the fields that appear in the report. You cannot customize the order in which the fields appear from left to right.

Calls Per Hour

Cost Per Call

Calls Per Paid Hour

Daily Budget

Hours In Service

Hours Paid

Number of Days

Service Queue

Shift Length

Total Calls

Hourly Rate

Utilization %

Staff Planning Report

This is a Strategic Planning report.

The Staff Planning report displays the projected number of employees needed to meet required staffing levels for the identified time frame.

The human resources displayed in this report are configured on the *Strategic Forecasts* page.

In order to run this report, you must already have a strategic forecast generated for the service queue.

How the report is calculated

The number of each human resource type to be planned for any given month equals (forecasted agent count for the month) × (resource ratio of the base resource to the agent resource) × (resource ratio for this resource)

> **Example:** If there is 1 supervisor for every 10 agents, and 1 manager for every 2 supervisors, then the formula to compute the number of managers needed in a month where the forecasted number of agents is 100 is:
>
> 100 × (1/10) × (1/2) = 5 managers

To view the report you must select:

- Service queues
- Start year
- End year
- Start month
- End month
- Format

The fields that appear in the report depend on the human resources that are configured on the Strategic Resources page. You cannot customize the order in which the fields appear.

Team Agent Interval Report

This is a Service Queue Performance report.

The Team Agent Interval report displays statistics for each agent of a selected team on a selected date who has activity during the half-hour intervals.

To display the report, you must select:

- Team
- Date(s)
- Format

You can also select which fields to display, except for Agent and Interval, which are required. By default, all fields are selected.

The following are the fields that you can select to appear in the report. You can customize the order in which the fields appear from left to right.

Average Handle Time

Average Talk Time

Average Work Time

Busy Other State Time

Calls Handled

Date

In Service Time

Occupancy %

Ready State Time

Team

Utilization %

Team Interval Report

This is a Service Queue Performance report.

The Team Interval report displays statistics on the activity for the selected teams on the selected date during each interval in which there was activity for that team.

To display the report, you must select:

- Teams
- Date(s)
- Format

You can also select which fields to display, except for Team and Interval, which are required. By default, all fields are selected.

The following are the fields that you can select to appear in the report. You can customize the order in which the fields appear from left to right.

Average Handle Time

Average Talk Time

Average Work Time

Busy Other State Time

Calls Handled

Date

In Service Time

Occupancy %

Ready State Time

Utilization %

Team Schedule Task Hours Report

This is a Schedule View report.

The Team Scheduled Task Hours report displays a breakdown of the daily time allotted to various activities for the selected team over a selected date range.

To display the report, you must select:

- Teams
- Date(s)

You can also select which fields to display, except for Team and Date, which are required. By default, all fields are selected.

The following are the fields that you can select to appear in the report. You can customize the order in which the fields appear from left to right.

Assignment Paid

Assignment Unpaid

Break Paid

Break Unpaid

Closed Paid

Closed Unpaid

Exception Paid

Exception Unpaid

In Service

Lunch Paid

Lunch Unpaid

Project Paid

Project Unpaid

Total Paid

Total Unpaid

Vacation Status Report

This is a Planning report.

The Vacation Status report displays a summary of selected agents' time off status for the selected date.

To view this report, you must select:

- Team or skill mapping
- Agent
- Vacation Plan
- Vacation Type
- Dates
- Format

You can select whether or not to display the Vacation Plan name in the report.

The following are the fields that can appear in the report. You cannot customize the order in which the fields appear from left to right.

Agent Name

Vacation Plan Name

Start Date

End Date

Vacation Type

Total Hours

Used Hours

Approved Hours

Remaining Hours

Report Field Dictionary

This section is an alphabetical listing and description of all fields that appear in WFM reports.

ABANDON %

The percentage of calls abandoned during the interval.

Abandoned % = (A ÷ B) × 100

Where:

A = Number of calls abandoned while the call was in queue or ringing at the agent's phone for the service queue during the interval, whether or not the call persisted less than the service level seconds.

B = Number of calls offered for the service queue during the interval.

For non-interactive service queues, reports display a dash for this field.

ACD ID

The agent's identifier in the ACD.

ACTIVITY DURATION

The duration of a scheduled activity, in minutes.

ACTIVITY END TIME

An activity's scheduled ending time.

ACTIVITY START TIME

An activity's scheduled starting time.

ACTIVITY TYPE

The type of activity: assignment, break, closed service, exception, lunch, or project.

ACTIVITY TYPE DETAILS

The exception name associated with the activity type. The service queue name is displayed for in-service activities.

ADHERENCE %

The percentage describing how well agents stick to their planned work schedule. This information is available for agents who have productivity data.

Adherence % = [(A – B) ÷ C] × 100

For data collected before WFM 8.9 was installed, these variables are defined as follows:

A = Total time during the interval the agent was scheduled to be in service and

was actually in service

B = Total time during the interval the agent was scheduled to not be in service and was actually not in service

C = Total time during the period that agent was scheduled to be in service and not in service

For data collected after WFM 8.9 was installed, these variables are defined as follows:

A = Total configured schedule adherence minutes

B = Total minutes not in adherence

C = Total configured schedule adherence minutes

AGENT ID

The agent's system ID number.

AGENT

The agent's name.

AGENT NUMBER

The agent's ID number.

AGENTS ACTUAL

The count of full time equivalent (FTE) agents supporting the service queue during the interval. Agent time is included only when the agent is in service.

Agents actual = A ÷ 1800

Where:

A = In service time in seconds for agents scheduled to support the service queue during the interval

AGENTS ACTUAL – AGENTS FORECAST

The number of Agents Actual minus the number of Agents Forecast.

AGENTS ACTUAL – AGENTS SCHEDULED

The number of Agents Actual minus the number of Agents Scheduled.

AGENTS FORECAST

The number of forecasted agents required for the service queue during the interval.

Agents forecast = Sum(forecasted agents) ÷ Number of intervals with at least one forecasted agent

AGENTS PROJECTED

The projected number of agents required for the service queue during the interval. This is a trend calculation based on the current trend of actual and forecasted agents.

Agents projected = sum of agents projected ÷ number of intervals with at least one projected agent

AGENTS SCHEDULED

The number of agents scheduled for the service queue during the interval.

AGENTS SCHEDULED – AGENTS FORECASTED

The number of Agents Scheduled minus the number of Agents Forecast.

AGENTS SHRINKAGE

The number of agents expected after shrinkage is applied.

Agents Shrinkage = (Agents Scheduled) – (Agents Forecast)

APPROVED HOURS

The total number of vacation hours approved but not yet used by the agent for the vacation type..

ASSIGNMENT

The time scheduled for the agent and classified as assignment type work.

ASSIGNMENT PAID

The amount of paid time classified as assignment type work.

ASSIGNMENT UNPAID

The amount of unpaid time classified as assignment type work.

ATTRITION RATE

The rate of loss of employees to promotion, transfer, or termination.

AVERAGE CALLS PER HOUR

The calculation of the average number of calls per hour.

Average calls per hour = 3600 ÷ (A + B)

Where:

A = Talk time in seconds for ACD calls completed during the interval

B = After call work time in seconds for ACD calls completed during the interval

AVERAGE HANDLE TIME

The average ACD contact processing (cross interval) time for the agent for the interval.

Average handle time = (A + B + C) ÷ D

Where:

A = Total talk time for ACD contacts handled during the interval

B = Total hold time for ACD contacts handled during the interval

C = Total after contact work time for ACD contacts handled during the interval

D = Total number of ACD contacts handled during the interval

AVERAGE HANDLE TIME ACTUAL

The actual average handle time during the interval.

Average handle time actual = Total handle time actual ÷ calls handled

AVERAGE HANDLE TIME FORECAST

The forecasted average handle time during the interval.

Average handle time forecast = Total handle time forecast ÷ calls offered forecast

AVERAGE HOLD TIME

Actual average on hold (cross interval) time for the agent for ACD contacts handled in the interval. This includes hold time for transfers and conferences.

Average hold time = A ÷ B

Where:

A = Amount of time agents placed contacts on hold during the interval, including hold time for transfers and conferences

B = Number of contacts placed on hold during the period. The call might have been placed on hold multiple times.

AVERAGE NOT READY TIME

The average amount of time (within the interval) the agent is in the Not Ready agent state.

Average not ready time = A ÷ B

Where:

A = The amount of time the agent is in the Not Ready agent state during the interval

B = Number of contacts completed during the interval

AVERAGE QUALITY SCORE

The average quality score of calls the agent completed during the interval. The quality scores come from calls that are evaluated using Workforce Management.

Average quality score = A ÷ B

Where:

A = Sum of the overall quality scores for evaluated calls the agent completed during the interval

B = Total evaluated calls the agent completed during the interval

AVERAGE READY TIME

The actual average amount of time (within the interval) the agent is in the Ready agent state.

Average ready time = A ÷ B

Where:

A = The amount of time the agent is in the Ready agent state during the interval

B = Number of contacts completed during the interval

AVERAGE SPEED OF ANSWER

The average amount of time callers spend in queue waiting for their calls to be answered.

Average speed of answer = A ÷ B

Where:

A = Queue time of calls that were answered during the interval. Queue time includes the time from when the ACD queues the call to the service queue until the time when the agent answers the call.

B = Number of calls for the service queue that were answered during the interval

For non-interactive service queues, reports display a dash for this field.

AVERAGE SPEED OF ANSWER TIME ACTUAL

The actual average amount of time callers spend in queue waiting for their calls to be answered.

AVERAGE SPEED OF ANSWER TIME FORECAST

The forecasted average amount of time calls spend in queue waiting for their calls to be answered.

AVERAGE TALK TIME

The average in contact (cross interval) time for the ACD handled contacts for the agent for the interval.

Average talk time = (A + B) ÷ C

Where:

A = Total talk time for ACD contacts handled during the interval

B = Total hold time for ACD contacts handled during the interval

C = Total number of ACD contacts handled during the interval

AVERAGE TALK TIME ACTUAL

The actual average talk time during the interval.

AVERAGE TALK TIME FORECAST

The forecasted average talk time for the interval.

AVERAGE AFTER CONTACT WORK TIME ACTUAL

The actual after contact work time during the interval.

AVERAGE AFTER CONTACT WORK TIME FORECAST

The forecasted average after contact work time during the interval.

AVERAGE WORK TIME

The average after contact work time (cross interval) for the ACD handled contacts for the agent for the interval.

Average work time = A ÷ B

Where:

A = After contact work time for contacts completed during the interval

B = Number of contacts completed during the interval

BREAK

The amount of break time scheduled for the agent during the interval.

BREAK PAID

The amount of paid break time scheduled for the agent during the interval.

BREAK UNPAID

The amount of unpaid break time scheduled for the agent during the interval.

BUSY OTHER STATE TIME

The amount of time the agent is logged in but is not in service during the interval.

CALLS ABANDONED

The number of ACD calls routed to the service queue during the interval where the caller hung up while in queue or while ringing at the agent's phone. Calls are counted for the interval in which the caller hung up.

CALLS ANSWERED

The number of ACD calls answered during the interval for the service queue. Calls are counted in the interval in which they are answered.

CALLS HANDLED

The number of ACD calls the agent completed during the interval.

CALLS INBOUND

The number of inbound ACD calls the agent completed during the interval.

CALLS OFFERED ACTUAL

The actual number of calls routed to the service queue during the interval that are answered or end in the service queue. In most cases the call is counted in the interval during which it is routed to the service queue.

> **Note**: Dequeued calls are counted in the service queue where they are answered and completed.

CALLS OFFERED FORECAST

The forecasted number of calls routed to the service queue during the interval.

CALLS PER HOUR

The number of ACD calls received per hour.

Calls per hour = (A × 3600) ÷ B

Where:

A = Number of calls handled during the hour

B = Total in service time in seconds during the hour

CALLS PER PAID HOUR

The number of total calls handled divided by the number of paid hours.

CALLS REFORECAST

The reforecasted number of calls routed to the service queue during the interval.

CALLS TRANSFERRED

The number of ACD calls the agent transferred during the interval.

CLOSED

The amount of closed time scheduled for the agent during the interval. Closed time is time scheduled for the agent during contact center closed hours, when the contact center is not accepting calls for the service queue.

CLOSED PAID

The amount of paid closed time scheduled for the agent during the interval.

CLOSED UNPAID

The amount of unpaid closed time scheduled for the agent during the interval.

CONFORMANCE %

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 16:00 but instead works from 10:00 to 18:00 would be conforming, but not adhering, to the schedule. This information is available for agents who have productivity data.

Conformance is calculated according to the following formula:

Conformance % = (A ÷ B) × 100

Where:

A = Total time during the interval the agent is in service, whether or not scheduled to be in service

B = Total time during the interval the agent is scheduled to be in service, whether or not the agent is actually in service

COST PER CALL

The average cost per call for the day.

DAILY BUDGET

The calculated total cost for the day.

DATE

The date of the reported information.

DAYS OFF APPROVED HOURS

The total amount of days off hours that have been approved for an agent to date.

DAYS OFF REMAINING HOURS

The total amount of days off hours that an agent has remaining to date.

DAYS OFF TOTAL HOURS

The total amount of days off hours available to an agent.

DAYS OFF USED HOURS

The total amount of days off hours used by the agent to date.

DURATION

The length of time an activity lasts.

END

The end of the day or interval.

END DATE

The end date of the reported information.

END TIME

The end time of day.

ENTIRE DAY

An exception that lasts the entire work shift.

EXCEPTION

The name of the exception.

EXCEPTION PAID

The amount of paid exception time scheduled for the agent during the interval.

EXCEPTION UNPAID

The amount of unpaid exception time scheduled for the agent during the interval.

FIRST NAME

The agent's first name.

FLOATING HOLIDAY APPROVED HOURS

The total amount of floating holiday hours that have been approved for an agent to date.

FLOATING HOLIDAYS REMAINING HOURS

The total amount of floating holidays hours that an agent has remaining to date.

FLOATING HOLIDAYS TOTAL HOURS

The total amount of floating holidays hours available to an agent.

FLOATING HOLIDAYS USED HOURS

The total amount of floating holidays hours used by the agent to date.

FORECAST ACCURACY

The percentage of forecasted calls to actual calls offered for the service queue during the interval.

Forecast accuracy = (A ÷ B) × 100

Where:

A = Forecasted calls for the service queue during the interval

B = Actual calls offered for the service queue during the interval

FORECAST AVERAGE HANDLE TIME

The forecasted average talk time plus the forecasted average work time.

Forecast average handle time = Total forecast handle time ÷ Forecast calls offered

FORECAST CALLS OFFERED

The number of ACD calls forecasted to be routed to the service queue during the interval.

FTE

The number of full time equivalent (FTE) employees.

HANDLED %

The percentage of calls handled by the agent out of he total number of calls offered to the agent.

Handled % = (A ÷ B) × 100

Where:

A = The number of ACD calls handled by the agent while logged in during the interval

B = The total number of ACD calls offered to the agent while logged in during the interval

HANDLE TIME ACCURACY

A measure of how accurate the forecast handle time is.

Handle time accuracy = (A ÷ B) × 100

Where:

A = Forecast average handle time

B = Actual average handle time

HOURLY RATE

The wage rate used in the calculations of the report.

HOURS IN SERVICE

The total number of in service hours for the day.

HOURS PAID

The total number of paid hours per day.

IN SERVICE

The amount of agent in service time scheduled during the interval for the service queue.

IN SERVICE HOURS

The number of hours the agent is scheduled to be in service.

IN SERVICE TIME

The amount of time the agent is logged in during the interval.

INTERVAL

The start time of the half-hour schedule interval.

INTERVAL BUDGET

The total cost for the interval requested.

LAST NAME

The agent's last name.

LUNCH

The amount of lunch time scheduled for the agent for the interval.

LUNCH PAID

The amount of paid lunch time scheduled for the agent for the interval.

LUNCH UNPAID

The amount of unpaid lunch time scheduled for the agent for the interval.

MAXIMUM CONTACTS IN QUEUE

The maximum number of non-interactive contacts in queue for the interval.

For interactive service queues, reports display a dash for this field.

MONTH

The name of the month in ISO format (MM).

NUMBER OF DAYS

The total number of days of the week included in the report. For example, if the report is broken out by days of the week, and the report covers three weeks, there will be three Mondays, three Tuesdays, and so on. The number of days for Monday is therefore 3.

OCCUPANCY %

The percentage of time the agent spends answering ACD calls in relation to the total amount of time the agent is logged in and ready to take calls during the interval.

Occupancy % = (A – B) ÷ A

Where:

A = Total in service time (within the interval)

B = Total ready time

OCCUPANCY % ACTUAL

The actual percentage of time the agent spends answering ACD calls in relation to the total amount of time the agent is logged in and ready to take calls during the interval.

Occupancy % = (A – B) ÷ A

Where:

A = Total in service time (within the interval)

B = Total ready time

OCCUPANCY % FORECAST

The forecasted percentage of time the agent spends answering ACD calls to the total amount of time the agent is logged in and ready to take calls during the interval.

Occupancy % forecast = Sum(occupancy forecast) ÷ Sum(calls offered forecast)

PAID HOURS ASSIGNMENT

The amount of paid assignment time scheduled for the agent for the interval.

PAID HOURS BREAK

The amount of paid break time scheduled for the agent for the interval.

PAID HOURS CLOSED SERVICE

The amount of paid closed service queue time scheduled for the agent for the interval.

PAID HOURS EXCEPTION

The amount of paid exception time scheduled for the agent for the interval.

PAID HOURS LUNCH

The amount of paid lunch time scheduled for the agent for the interval.

PAID HOURS PROJECT

The amount of paid project time scheduled for the agent for the interval.

PAID HOURS TOTAL

The total paid hours for the interval.

Paid hours total = In Service Hours + Paid Hours Break + Paid Hours Lunch + Paid Hours Exception + Paid Hours Project + Paid Hours Assignment + Paid Hours Closed Service

PERCENT ASSIGNMENT

The percentage of scheduled assignment time for the interval.

Percent assignment = (A ÷ B) × 100

Where:

A = Scheduled assignment work time for the interval

B = Total scheduled time for the interval

PERCENT BREAK

The percentage of scheduled break time for the interval.

Percent break = (A ÷ B) × 100

Where:

A = Scheduled beak time for the interval

B = Total scheduled time for the interval

PERCENT CLOSED

The percentage of closed time for the interval.

Percent closed = (A ÷ B) × 100

Where:

A = Scheduled closed time for the interval

B = Total scheduled time for the interval

PERCENT EXCEPTION

The percentage of exception time for the interval.

Percent exception = (A ÷ B) × 100

Where:

A = Scheduled exception time or the interval

B = Total scheduled time for the interval

PERCENT IN SERVICE

The percentage of in service time for the interval.

Percent in service = (A ÷ B) × 100

Where:

A = Scheduled in service time for the interval

B = Total scheduled time for the interval

PERCENT LUNCH

The percentage of lunch time for the interval.

Percent lunch = (A ÷ B) × 100

Where:

A = Scheduled lunch time for the interval

B = Total scheduled time for the interval

PERCENT OVERTIME

The percentage of overtime time for the interval.

Percent overtime = (A ÷ B) × 100

Where:

A = Scheduled overtime time for the interval

B = Total scheduled time for the interval

PERCENT PROJECT

The percentage of project time for the interval.

Percent project = (A ÷ B) × 100

Where:

A = Scheduled project time for the interval

B = Total scheduled time for the interval

PERSONAL DAYS APPROVED HOURS

The total amount of personal days hours that have been approved for an agent to date.

PERSONAL DAYS USED HOURS

The total amount of personal days hours that an agent has remaining to date.

PERSONAL DAYS TOTAL HOURS

The total amount of personal days hours available to an agent.

PERSONAL DAYS USED HOURS

The total amount of personal days hours used by the agent to date.

PRECISION %

The gap between forecasted calls and actual offered calls, expressed as a percentage.

Precision % = (A ÷ B) × 100

Where:

A = Forecasted calls

B = Actual calls offered

PROJECT

The amount of project time scheduled for the agent for the interval.

PROJECT PAID

The amount of paid project time scheduled for the agent for the interval.

PROJECT UNPAID

The amount of unpaid project time scheduled for the agent for the interval.

READY STATE TIME

The amount of time the agent is logged in and waiting to take an ACD call during the interval.

REMAINING HOURS

The total number of vacation hours remaining for use by the agent for the vacation type.

SECONDS SERVICE LEVEL SCHEDULED

The scheduled number of seconds within which a call must be answered if it is to meet the service level objective.

SERVICE

The service queue that the agent is supporting.

SERVICE LEVEL

The percentage that describes the achievement of goals for customer call handling per interval.

For example, if your goal is an average speed of answer of 20 seconds or less, and 80% of your calls are answered in 20 seconds or less, then your service level is 80%.

Service level percentage = [(A + B) ÷ (C + D)] × 100

Where:

A = The number of calls for the service queue the caller abandoned during the interval and were in queue less than the service level number of seconds

B = The number of calls for the service queue an agent answered during the interval and for which the queue time was less than the service level number of seconds

C = The number of calls for the service queue that the caller abandoned during the interval, regardless of the time the call was in queue

D = The number of calls for the service queue an agent answered during the interval, regardless of the time the call was in queue

Service Level Type 2: Abandoned calls have negative impact

service level percentage = [(calls) ÷ (calls offered –router calls dequeued)] × 100

Service Level Type 3: Abandoned calls have positive impact

service level percentage = [(calls + calls abandoned) ÷ [(calls offered – router calls dequeued)] × 100

SERVICE LEVEL % ACTUAL

The actual service level percentage, a speed of answer goal that is often expressed as a percentage for answering calls within a specified number of seconds.

See *service level* for how this value is calculated.

SERVICE LEVEL % FORECAST

The forecasted percentage of calls answered within the service level threshold time per interval.

See *service level* for how this value is calculated.

SERVICE LEVEL % GOAL

The goal percentage of calls to be answered within the service level threshold time, per interval.

See *service level* for how this value is calculated.

SERVICE LEVEL % SCHEDULED

The anticipated percentage of calls answered within the service level threshold time, per interval. This is a real-time calculation made when the report is generated.

See *service level* for how this value is calculated.

SERVICE LEVEL % SHRINKAGE

The anticipated service level percentage based on the anticipated agents after shrinkage.

For example, if you have a Service Level % Scheduled of 80%, and 10 agents scheduled with a Shrinkage % of 10%, then Agents Shrinkage would be closer to 9 agents and the Service Level % Shrinkage would be less than 80%.

See *service level* for how this value is calculated.

SERVICE QUEUE

The name of the service queue that the agent supports.

SHIFT LENGTH

The length of a work shift for a service queue.

SHRINKAGE %

The shrinkage rate that is configured on the Shrinkage page (Application Management > Schedules > Shrinkage).

START

The start time of the day or period.

START DATE

The start date of the reported information.

START TIME

The start time of the work shift.

TEAM

The name of the team.

TEAM NAME

The name of the team.

TOTAL

The total time scheduled for the agents supporting the service queue for the interval.

Total = In Service + Break + Lunch + Exception + Project + Assignment + Closed

TOTAL CALLS

The total number of calls for the day.

TOTAL HANDLE TIME

For service queues:

Total handle time = Talk time (including hold time) + After contact work time

For agents: The actual total ACD contact handling (cross interval) time in seconds for the agent in the interval.

Total handle time = Talk time + Hold time + After contact work time

TOTAL HOLD TIME

Actual total on hold (cross interval) time for ACD contacts handled in the interval. It includes hold time for transfers and conferences during the interval.

TOTAL HOURS

The total number of vacation hours available to the agent for the vacation type.

TOTAL IN SERVICE TIME

Total in service time (within the interval) is the total time, in seconds, that the agent was in a state ready to take an ACD contact or was handling an ACD contact during the interval.

TOTAL LOGIN TIME

The total login time (within the interval) for the agent during the interval.

TOTAL NOT READY TIME

Total not ready time (within the interval) is the total time the agent was in the Not Ready agent state during the interval.

TOTAL PAID

The total hours of paid time scheduled for the interval.

> Paid in-service hours + Paid break hours + Paid lunch hours + Paid exception hours + Paid project hours + Paid assignment hours + Paid closed hours

TOTAL READY TIME

Total ready time (within the interval) is the total time the agent was in the Ready agent state during the interval.

TOTAL TALK TIME

Actual total talk time (across intervals) the agent was on ACD contacts. The time runs from when the agent answers an ACD contact until when the agent disconnects the contact, and does not include hold time.

TOTAL UNPAID

The total hours of unpaid time scheduled for the interval.

TOTAL WORK TIME

Actual total work time (cross interval) for the agent for ACD contacts handled in the interval.

USED HOURS

The total number of vacation hours used by the agent for the vacation type.

USERNAME

The agent's username.

UTILIZATION %

Utilization percentage is the percentage of time the agent spends answering ACD calls to the total amount of time the agent is logged in during the interval.

Utilization % = A ÷ B

Where:

A = Total handle time

B = Total in session (login) time

VACATION APPROVED HOURS

The total amount of vacation hours that have been approved for an agent to date.

VACATION PLAN NAME

The name of the vacation plan assigned to the agent.

VACATION REMAINING HOURS

The total amount of vacation hours that an agent has remaining to date.

VACATION TOTAL HOURS

The total amount of vacation hours available to an agent.

VACATION TYPE

The name of the vacation type as configured in WFM.

VACATION USED HOURS

The total amount of vacation hours used by the agent to date.

WEEKLY BUDGET

The total cost for the week.