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Decisions User Help

Flow Through Hiring

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Flow Through Hiring

The Flow Through Hiring feature will transfer agents based on resource needs to different staff types within the same center. This feature works from templates that are pre-designated by the Administrator. Within the Administration application, agents can be transferred right after the classroom training has completed (Transfer after learning) or full time tenured agents (Transfer as needed) based off of missing staff in a specific Staff/Contact type or group. Genesys Decisions will adjust accordingly the number of agents in and out of staff/contact types and groups based off of the percentages displayed in the Flow Through Hiring template in the Administration application as well as when the optimizers are run to hire/transfer agents to meet service goals.

The Flow Through Hiring feature can only flow agents from one staff type to another within the same center. It cannot transfer agents between centers.

Using Flow Through Hiring

After successfully creating a Flow Through Hiring template within the Administration tool, you now have the option of applying it to a scenario. You can do this by the following:

- When creating a new scenario, select a Flow Through Hiring template that is created while setting the date and routing type of the new scenario. Click the **New** button or click **File** > **New**.
- You can also change the current scenario you are working on to include a Flow Through Hiring template. This can be done in the Scenario Settings window. To do this, click **Edit** > **Scenario settings**. The settings will be on the main tab labeled **Duration** and select the drop-down menu of templates from here.
- The Flow Through Hiring template configuration will determine how agents will be transferred in and out of specific staff types. Agents can be automatically transferred after the learning period is completed or transferred as needed. In order for transfer after learning to complete, there must be agents in learning and the agents must be in their final week of training.
- Agents will only be moved from one staff type to another when the hiring optimizer is run.
- After the optimizer is run, you may view the number of agents being transferred by looking at the Transfers [FTE] metric on the main grid.
- To get a more detailed look at transferred agents only dealing with Flow Through Hiring, look at the metric Transfer to New Hire Totals [FTE]. This metric depicts any Flow Through Hiring agents being transferred. Since you can only have one relation per center for transfers, you must know the types of agents being transferred by the Flow Through Hiring template. There is no way to report the difference in Flow Through Hiring relations.

Flow Through Hiring Expert

The Flow Through Hiring Templates are designed to allocate the flow of agents to the correct staff/contact types. There can be multiple templates created and you may choose the staff/contact types that you want included within the Flow Through Hiring set-up. You have the ability to transfer agents two different ways. The first is to transfer agents as needed, which only transfers agents from one staff/contact type to another if necessary. The second is to transfer after learning. This immediately transfers agents after the learning curve to whichever designated staff/contact type set-up you have indicated in the Flow Through Hiring template. The amount of agents transferred is based off of percentages as well. The total allocated agent percentages must equal 100% of agents transferred from the main staff/contact type.

The set-up of a Flow Through Hiring Template is as follows:

- Open the Administration application.
- Click Configure or click Settings -> Configure and select Edit Flow Through Hiring Template. The following options are available within in the Flow Through Hiring Expert:
    - Select Create a New Flow Through Hiring template to create and name a new template
    - Select Edit/View an existing Flow Through Hiring template to review or make changes to an existing Flow Through Hiring template
    - Select Delete an existing Flow Through Hiring template to remove an existing template from the list.
    - Select Copy from an existing Flow Through Hiring template to create a new template that has the same configuration as an existing template.

Flow Through Hiring Template

When creating a New Flow Through Hiring template:

1. In the Administration application, select Create New Flow Through Hiring Template and click OK.
2. Input a name for the new template, choose the routing to apply, and then select a Security Setting. The options are as follows:
    - Select Public to allow full access for all users (View, Edit, Copy, Execute, Delete).
    - Select Public Read-Only to allow full access for the creator. Limited access for other users (View, Copy, Execute).
    - Select Private to allow full access for the creator and no access for other users.
3. Enter a name for the template and Click OK to proceed to the Flow Through Hiring Template window. The following buttons are available in the Flow Through Hiring Template window:
    - Print Preview – allows users to modify the way the template is printed
    - Print – prints to default printer
    - Export – creates an export file (HTML or Excel/Text)
    - Save – saves current template with all settings
    - Hide/Unhide Centers – adds or removes the centers pane from the window
    - Close – If changes were made, Genesys Decisions will ask to save before closing. Click Cancel to discard changes.

    At the top of this window, you can choose between 2 different layout styles for the Centers table. The default theme is Toolbox Style. The second is Outlook Style which is similar to the Microsoft Outlook 2007 window format. Also, you may detach the Centers table by double clicking the frame of the table to make it free moving.

Click the center name to display the staff types. *NOTE* A template can only flow agents from staff type to staff type within the same center. It cannot transfer staff between centers.

To select the staff types, drag and drop them into the template on the right or double click the name of the staff type. This will display the staff type as a block inside the template space provided to the right. These blocks are movable.

Once all the desired staff types are chosen, you can then set up the relations and percentages among staff types. To set up a relation between 2 staff types:

- Click the staff type that agents are to flow out of and then click the staff type agents are to flow into. This creates a relation between the two staff types showing the direction of agent flow.
- The window that pops up will have 2 options for transferring agents:
    - The first option is Transfer after learning (green arrow) which can ONLY be between staff types within the same contact group. This automatically transfers agents into the staff type after classroom training is completed and the learning period is over.
    - The second is Transfer as needed (blue arrow) which only transfers agents to a specific staff type if that staff type requires more agents in order to meet its service objectives.

      Each of these options has a percentage as well. This percentage tells the initial staff type how many agents it can actually transfer to the receiving staff type as a percentage of the total FTE available to transfer (either from learning or from the total agents metric depending on the relation)
- Once all the staff types and relations are in place, use shortcut menu (right-click) functions to modify what was previously created.
    - To delete a staff type, right-click the staff type and select delete staff (or highlight the staff type so it is outlined in red and press the delete key on the keyboard).
    - Right click the relation (arrow) and select **Delete Relation** to delete the highlighted relation, or **Edit Relation** to change the relation type and percentage.