GENESYS™

Genesys Engage cloud Workforce Management 8.5.1 Guide

Configuring Schedule State Groups

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
> **Important**
>
> This content may not be the latest Genesys Engage cloud content. To find the latest content, go to Workforce Management in Genesys Engage cloud.

To create a schedule state group, you must first select a site within a business unit. When you select a schedule state group or create a new one, the **Schedule State Group Properties** pane opens.

The following topics provide information to help you create and manage your Schedule State Groups:

- Schedule State Groups Pane Controls
- State Group Properties Pane Controls
- State Type Pane Controls
- Assigning a State to Multiple Groups
- Creating Schedule State Groups
- Creating Groups Using Copy and Paste
- Editing Schedule State Groups
- Deleting Schedule State Groups

Schedule State Groups Pane Controls

Search *field*	Enter the search criteria. For example, the name of the schedule state group.
New	Click to create a new schedule state group.
Delete	Click to delete an existing schedule state group.
Copy	Click to copy and paste an existing schedule state group.
Help	Click to view a Help topic about the **Schedule State Group** pane.

State Groups Properties Pane Controls

🖫 **Save Now**	Click to save changes you have made in this pane.
💿 **Help**	Click to view a Help topic about the **Schedule State Group Properties** pane.
Name *field*	Enter a name for the Schedule State Group.
Type drop-down list	Select a type for the Schedule State Group, such as **None** (default), **Planned Overhead**, **Unplanned Overhead**, **Actual Work**.
➕ **Assign Schedule States**	Click to assign a schedule state to the group and open the **State Type** pane, from which you can select states from various state types (see controls below).
➖ **Unassign Schedule States**	Click to remove or unassign a schedule state.

State Type Pane Controls

↵ **Apply**	Click to apply the state to the schedule state group.
✖ **Close**	Click to close the **State Type** pane.
💿 **Help**	Click to view a Help topic about the **State Type** pane.
State Type *drop-down list*	Select a state type for the Schedule State Group, such as **Fixed State**, **Activity**, **Exception Type**, **Break**, **Meal**, or **Time-Off Type**.
☐ **Show Assigned States** *check box*	Check this box to display the states that are already assigned. When checked, the name of the schedule state group, to which this state is assigned displays in the **Schedule State Group** column.
🔍 **Search** *field*	Enter the search criteria. For example, if you selected **Exception Type** in the **State Type** drop-down list, enter an exception type name, such as **Exc1** or **Exc2**.

Assigning a State to Multiple Groups

You can assign the same schedule state(s) to different Schedule State Groups under the same Business Unit. For example, you can assign the state ExceptionType1 to SSG1 (under Site1 & under BU1) and to SSG2 (under Site2 & under BU1) at the same time—but only because both Schedule State Groups are under the same Business Unit (BU1).

Previously, a Schedule State could be assigned to a Schedule State Group only once at any given

time.

Preset Schedule State Groups

Schedule state groups from a previous release of Workforce Management are brought into the WFM Web as pre-configured groups. The default groups, which can be edited or deleted are: **Asynchronous Work**, **Days Off**, **Exception Types**, **Fixed-Staff Work**, **Immediate Work**, **No Activity**, **Shift Items/Meals**, and **Time Off**.

Creating Schedule State Groups

1. In the **Configuration > Schedule State Groups** pane, select a the site for which you want to create the schedule state group.

2. On the **Schedule State Groups** pane, select **New** .
   The new schedule state group displays with a default name and the **Schedule State Group Properties** pane opens.

3. In the **Name** field, enter a name for your schedule state group. It must be unique within the site.

4. From the **Type** drop-down list, select a type (**None** (default), **Planned Overhead**, **Unplanned Overhead**, or **Actual Work**).

5. Assign schedule states to the group by clicking **Assign Schedule States** .
   The **State Type** pane opens.

   > ### Tip
   >
   > To remove any schedule state, select it and click **Unassign Schedule States** .

6. Select a **State Type** from the drop-down menu.
   A list of states that are associated with this state type are displayed in the lower half of the pane.

7. (Optional) to display any states already assigned to the schedule state group, click the **Show Assigned States** check box.

8. When you have finished adding schedule states, click **Apply** .

9. In the **Schedule State Group Properties** pane, from the drop-down list, select **Adherence Rules** to continue configuration of this schedule state group. See Configuring Adherence Rules.

Creating Groups Using Copy and Paste

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

1. In the **Schedule State Groups** pane, select a schedule state group.

2. Select **Copy** 🗐 .
   The **Copy Schedule State Group** *<schedule state group name>* pane opens.

3. Enter a name for the new schedule state group. It must be unique within the site.

> ### Tip
> If the name is not unique, the **Review Validation Messages** pane opens, with a description of the error message. In this case, A duplicate name specified.

4. In the lower half of the pane, select the business unit and site, with which you want to associate this schedule state group.

5. Click **Save Now** 💾 .
   The new schedule state group appears in the objects list according to the sort order selected (ascending or descending).

Editing Schedule State Groups

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

To edit a schedule state group:

1. Select it **Schedule State Group** pane and make the changes in the **Schedule State Group Properties** and **Adherence Rules** panes.

2. Change the schedule state group name, if necessary. It must be unique within the site.

3. Change the state type, by selecting one of the four state types from the drop-down list.

4. Use the **Assign Schedule States** ➕ or **Unassign Schedule States** ➖ to change state assignment for this group.

5. When you have finished adjusting which schedule states are included, click **Apply** ↵ .

6. Click **Save Now** 💾 .

7. At the top of the **Schedule State Group Properties** pane, click **Adherence Rules** to continue configuration of this schedule state group. See Configuring Adherence Rules.

> ### Important

If you make any change to a Schedule State Group (assign or unassign a state, or change the adherence rule), the Schedule State Group effective date automatically updates to the current date.

Deleting Schedule State Groups

To delete a selected schedule state group from the **Schedule State Groups** pane:

1. Select the schedule state group you want to delete.

2. Click **Delete** .

3. When the **Confirmation** dialog appears, click **Yes**.
   The schedule state group is deleted and any schedule states included in it now appear on the **State Type** pane.