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Workforce Management Administrator's Guide

Planning

5/10/2025

Planning

Overview

Before configuring Workforce Management (WFM), plan a detailed, suitable combination of Configuration Manager objects and workforce management activities. This information is the basis for all subsequent workforce planning and should not be changed. Any changes to the workforce management activity configuration might compromise the usefulness of historical data. Agents, users, time zones, and skills are defined as objects in Configuration Manager. These objects are brought into WFM through synchronization with the Configuration Database performed by the WFM Configuration Utility.

Carefully consider the relationships among these objects when using them for enterprise planning. The relationship between skills, configured in Configuration Manager, and activities, created in the WFM Configuration Utility, is especially important.

Using the WFM Configuration Utility

You configure WFM objects and working rules in the Configuration and Policies sections of the application. Configuration objects include user security settings, organizations, activities, schedule-state groups, skills, time zones, and events. Organization rules, contracts, shifts, task sequences, timeoff types, time-off accrual rules, exception types, meetings, marked-time types, and rotating patterns are set up in the Policies section.

The WFM Configuration Utility also includes a module that enables you to import and export historical data.

Using WFM Web

WFM Web for Supervisors provides calendar management, forecasting, scheduling, performance monitoring, real-time agent-adherence monitoring, and reporting capabilities. The success of your forecasts and schedules depends considerably on the accuracy and completeness of your configuration of WFM objects and working rules.

See these planning topics:

- [About WFM Configuration Objects](#)
- [About WFM Policy Objects](#)
- [Forecasting Considerations](#)
- [Scheduling Considerations](#)
- [About Performance Monitoring](#)
- [About Adherence Monitoring](#)