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Workforce Management Administrator's Guide

Enabling and Configuring Wait-list Functionality

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Enabling and Configuring Wait-list Functionality

In this topic, you will find lists and descriptions of the conditions and settings that make Workforce Management (WFM) wait-list functionality possible, and offers or refers to instructions for these tasks:

- Automatic Approval (sometimes called auto-granting)
- Auto-publishing
- Wait-listing
- Handling preferred time-off requests
- Making ungranted time-off requests *count* in a build
- Improved viewing time-off availability

If WFM cannot immediately grant a time-off request, it puts the request on a waiting list (called wait-listing). When all requirements are met, including configuration, WFM can grant the request and insert it into the Master Schedule automatically.

The information in this topic supplements the information found in [Workforce Management Web for Supervisors Help](#) and [Workforce Management Web for Agents Help](#). It includes the following sections:

This topic includes the following sections:

- [Overview](#)
- [Enabling and Configuring Wait-listing](#)
- [Use Cases and Notes](#)

Overview

WFM considers all wait-listed time-off requests on a First-In, First-Out (FIFO) basis, using the date and time of the request. To determine if there are slots available for the wait-listed time-off request, the process first considers all time off instances that are Granted/Granted and Scheduled and have intersecting time steps with the wait-listed request for time off. If the CalendarOverSchedule option is set, then Granted/Not Scheduled time off instances are also taken into account before processing the wait-list.

Next, WFM considers all Preferred time-off requests that were submitted earlier than the wait-listed request that is currently being processed. Only Preferred time-off instances that count against the time-off limit according to their actual status are considered. Also, if an earlier Preferred request is not valid for time-off within the various limits, it is ignored.

You can configure the advance threshold for automated time-off wait-listing. You can also configure the minimum number of weeks in advance that a request can be made for each time-off rule; that

minimum number is called the automatic approval threshold. If an ungranted time-off request in the wait-list violates the automatic approval threshold, then WFM removes the request from the wait-list. That time-off request remains in the status Preferred, but it cannot remain wait-listed.

See [Enabling Automatic Approval and Configuring the Threshold](#).

Events that might change the system's ability to grant time off, such as the agent's contract availability status, can affect the validity of any time-off request. Thus, wait-listing takes place on a schedule that is specified by a timeout option.

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Enabling and Configuring Wait-listing

The following sections provides information about enabling and configuring wait-listing, and describes how auto-approvals, thresholds, and auto-publishing affect wait-listing.

Automatic Approval of Time-off Requests

Wait-list automation is related to automatic approval functionality. The common workflow of wait-list automation is:

1. An agent's time-off request is automatically approved, but there are no time-off slots within the limits of the request.
2. The request is wait-listed until the appropriate time-off slots appear, and then automatically approved, if possible.
3. If automatic approval is enabled but the time-off request is beyond the automatic approval threshold, then the request cannot be wait-listed. It is instead saved with the status Preferred.

Important

Automatic approval must be enabled for wait-listing to work. If automatic approval is not enabled, then the supervisor must manually grant time-off requests and a request cannot be wait-listed, even if requested by the agent.

Enabling Automatic Approval and Configuring the Threshold

Automatic Approval must be enabled for wait-listing to work.

(Click the plus sign to display procedures related to automatic approval.)

[+]

Procedure: Learning about Automatic Approval

Purpose: To learn about automatic approval by reading topics in Configuration Utility Help.

Start of Procedure

1. Open the Configuration Utility Help topic Policies > Time-Off Rules > Configuring Time-Off Rules.
2. Scroll down to the Time Off Request Rules Area.
3. Locate the option Automatic Approval A Minimum of Week(s) in Advance And For A Minimum Of Hours.
4. Read the text in this section of Help.

End of Procedure

Enable and Configure Automatic Approval

Purpose: To use the Configuration Utility application to enable and configure automatic approval.

Start of Procedure

1. Open Configuration Utility.
2. Open the Policies > Time Off Rules dialog box.
3. Select the option Automatic Approval A Minimum of Week(s) in Advance And For A Minimum Of Hours.
4. Enter values into the empty fields ().

End of Procedure

Configuring Auto-Publishing

When WFM automatically approves a time-off request, it can also insert it into the Master Schedule automatically, if auto-publishing is enabled.

To enable and configure auto-publishing, use Configuration Manager or Genesys Administrator to set the WFM Server **AutoPublishTimeOffToSchedule** option value to 1 or 2.

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Configuring Wait-Listing

Wait-listing is a background function that is enabled by circumstances and configuration. The circumstances are: automatic approval must be enabled and an agent's time-off request must be valid (time off slots and agent credit must be available).

To configure wait-listing, use Configuration Manager or Genesys Administrator to open the WFM Server **WaitlistTimeout** option.

Notes

Why does a time-off request get wait-listed?

- The time-off request is valid (for example, not for time in the past).
- The time-off request is not for more time than the agent's time-off balance contains.
- The automatic approval option is enabled.

WFM will only wait-list those time-off requests that would have been automatically approved, if not for time-off limits. Also:

- If automatic approval is not set up in the accrual rule or the threshold has been passed, then that particular time-off cannot be wait-listed.
- The requesting agent should have sufficient time-off balance and there can be no other restrictions.
- If limits allow, the request will be granted and not wait-listed.

Treatment of Preferred Time-off Requests

Preferred time-off requests (having the status Preferred) are not considered during schedule building. When a master schedule is published, Preferred time-offs do not count against limits and agent balance anymore, because they are usually not scheduled.

To override this functionality, use Configuration Manager or Genesys Administrator to open the WFM Server option **CalendarOverScheduleData**, which makes unscheduled time-offs count against the agent balance and time-off limits.

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Viewing Available Time-off Slots

Now Agents can see if the time off that they want is available before they request it. At the Time Off screen, just hover the cursor over any time slot, and you will see time off limits and wait list data about the time slot in a popup.

See the section "Wait-Listing Notes" in the *Workforce Management Web for Agents Help* topic Time Off > Requesting Time Off.

Use Cases and Notes

The following use cases discuss scenarios to compare availability and seniority, and provide some additional important rules to keep in mind.

When Availability Overrides Seniority

1. Request A asks for time slots that are not available (8AM-6PM). The time 8-9AM is not available, and so Request A is wait-listed.
2. Request B comes in later, but asks for time slots that are available (10AM-6PM).

The Result:

Request B is granted and Request A remains wait-listed, even though Request B came in later.

When Seniority Overrides Availability

1. Request A is wait-listed. The time slots for automatic approval of this request become available, but the wait-list timeout has not yet expired. So this request remains wait-listed.
2. Request B comes in later and asks for the same time slots as Request A.

The Result:

- If the time slots are available for both requests, Request B is honored immediately and Request A is honored after the wait-list timeout expires.
- If the time slots are available for only one request, Request B is wait-listed and after the wait-list timeout expires, Request A is granted first.

Rules to Remember

- When the wait-list process can grant a request, it changes the saved status of that request to granted (and removes the internal wait-list flag).
- If the auto-publish and wait-list functions are set up together, then granted requests are published to the master schedule.
- A wait-listed request can be granted only if: automatic approval is enabled, the time-off request is valid, there are no other restrictions.

WFM removes from the wait-list any time-off request that has expired (the time steps that it specifies are in the past) or belongs to an agent with no timeoff balance.

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