Workforce Management Administrator's Guide

Preface

4/25/2025

Preface

This preface provides an overview of the *Workforce Management 8.1 Administrator's Guide*. It identifies the primary audience, provides commenting instructions and contact information, and lists document changes for all 8.1.x releases. It includes the following topics:

- Intended Audience
- Making Comments on This Document
- Contacting Genesys Customer Care
- Document Change History

The information in this Administrators Guide:

- Is valid only for the 8.1 release(s) of this product.
- Introduces the product, lists important features, and presents the WFM architecture.
- Offers deployment-planning recommendations and considerations.
- Explains how to configure and install the Workforce Management (WFM) components.
- Explains how to start and stop all components.
- Explains how to use the WFM Database Utility.
- Provides troubleshooting suggestions.
- Includes a list of WFM-specific terms and their definitions.

> ### Important
> For versions of this document created for other releases of this product, please visit the Genesys Customer Care website, or request the Documentation Library DVD, which you can order by e-mail from Genesys Order Management at Genesys Order Management

Intended Audience

This document, primarily intended for contact center managers and system administrators, assumes that you have a basic understanding of:

- Computer-telephony integration (CTI) concepts, processes, terminology, and applications.
- Network design and operation.
- Your own network configurations.

You should also be familiar with:

- Genesys Framework architecture and functions
- Industry-standard workforce management terms and practices.

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Making Comments on This Document

If you especially like or dislike anything about this document, feel free to email your comments to Technical Publications Web Administrator.

You can comment on what you regard as specific errors or omissions, and on the accuracy, organization, subject matter, or completeness of this document.

Please limit your comments to the scope of this document only and to the way in which the information is presented.

Contact your Genesys Account Representative or Genesys Customer Care if you have suggestions about the product itself.

When you send us comments, you grant Genesys a nonexclusive right to use or distribute your comments in any way it believes appropriate, without incurring any obligation to you.

Contacting Genesys Customer Care

If you have purchased support directly from Genesys, please contact Genesys Customer Care.

Before contacting Customer Care, please refer to the Genesys Care Program Guide for complete contact information and procedures.

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Document Change History

This document has been updated for new and changed functionality in the initial 8.1 release of Workforce Management (WFM), as described in the Release Notes and online help for WFM components. The following sections list topics that are new or that have changed significantly since the first release of this document:

Document Version 8.1.301.00

- New In this Release is updated to describe the new features introduced in this release.

- WFM Configuration Options includes descriptions for new WFM Server Options:

    - In the ConfigService configuration section: the MSARestrictAccess option.

    - In the new ETL configuration section: the DaysAhead, DaysBack, DayChunk, and ETLTimeout options.

- WFM Localization includes a new Legal Notice section.

- Troubleshooting Your WFM Configuration has a new Inaccurate Actual Headcount for Multi-Site Activities and Activity Groups section.

- Manually Creating and Configuring WFM Application Objects has a new Backup Configuration Server Host and Port subsection.

- Workforce Management 8.1 Administrator's Guide Welcome page has two new map boxes to highlight WFM Primers and WFM Reports and Metrics.

- Preparing to Install WFM has two new sections: Connect to Backup Configuration Server and Connect to Backup WFM Server, and an updated Database Access Privileges subsection (for Microsoft SQL Server).

- Managing WFM Database Utility has a new ETL Database Setup section.

- Setting Up an ETL Database is a new topic/page.

- Using the Backup-Restore Utility is a new topic/page.

Document Version 8.1.201.00

- New In this Release has been update to describe the new features introduced in this release.

- WFM Configuration Options includes descriptions for two new options: PageLimit and PageLimitForCSV.

- WFM Overtime Functionality has been added to describe how to set and view Overtime.

Document Version 8.1.102.00

- The topic, Using Genesys Localization Software is new in this release and the existing section was renamed to Using Self-Localization to provide more information about how WFM 8.1 software can be localized.

Document Version 8.1.101.00

- The topic, MS SQL Database Replication is new in this release.

- The topic, Enabling and Configuring Wait-list Functionality is new in this release.

- The following configuration options were added or modified (see WFM Configuration Options):

    - AdjustCarryOverByBonus

- AutoPublishTimeOffToSchedule

- CalendarOverScheduleData

- PreventTimeOffNoAvailability

- RecalculateForecastStaffing

- TrackAhead

- TrackBack

- WaitlistTimeout

Document Version 8.1.001.00

- The following configuration options were added or modified (see WFM Configuration Options):
  - MaxSchedulingThreadPoolSize
  - MultiSiteActivitiesEnabled
  - AllowAccessToCarpools
  - ShowSSGonFirstPageOnly (not new in 8.1; previously undocumented)

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