Workforce Management Administrator's Guide

List of Terms

12/19/2025

List of Terms

Many important terms are used throughout the Workforce Management (WFM) application and documentation. This page lists these terms and their definitions in alphabetical order. (Click the appropriate tab.)

A

Abandonment Percentage

The percentage of interactions in which the customer ends the interaction before an agent begins handling it. You can set a value for this service objective in the `Forecast` module's Staffing Build Wizard in WFM Web.

Accrual Rule

See Time-Off Rule.

Activities Groups

Activities Groups are lists that you create. They contain more than one activity, but can be manipulated like a single activity, to avoid repetitive tasks, such as configuring a dozen activities for the same agent.

Activity

WFM database objects that represent contact center tasks in which agents can be engaged. You can track and manage these activities through the WFM Web Forecast, Schedule, and Performance modules. You can schedule up to 100 `Activity` objects simultaneously for each site, depending on your specific needs.

There are three types of activities: *immediate work*, *deferred work*, and *fixedstaff work*. These were formerly called *phone activity*, *multimedia activity*, and *exclusive activity*, respectively.

See also Multi-Site Activity and Activities Groups.

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Activity Set

An activity or group of activities that you can assign to multi-skilled agents for a specified period of time. During that time, the agents can work on no other activities. If the Activity Set was created with `strict` checked selected, then Scheduler cannot schedule meals at times that would interrupt the activity set.

Adherence

A WFM function that enables you to view agent real-time adherence. After you have created the forecast and schedule, adherence shows how closely the actual agent behavior matches (complies with) the schedule. You can configure the length of time that an agent can deviate from the schedule and continue to comply with it. See also Performance.

Agent

A database object imported from the Configuration Database that represents a contact center employee. In the WFM Configuration Utility, you can assign Agent objects a number of additional properties that pertain specifically to the WFM environment.

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Agent State

See Schedule State Group.

Agents Logged In

See Working Agents.

Alert

A Performance module function indicating that administrator action might be necessary. For example, too many calls are being abandoned, or too few agents are logged in.

The Alert function uses Master Forecast and Master Schedule data as a baseline for performance levels. The alert appears when current performance statistics deviate from the forecasted or scheduled levels by an amount that you specify.

Alternative Break

Not used in WFM 7.0 or later.

Alternative Time Zone

See User Time Zone.

Application Template

An object in Configuration Manager that contains the default configuration information for an application. WFM requires the following application templates: WFM Client (for the WFM Configuration Utility and the WFM Database Utility), WFM Server, WFM Data Aggregator, WFM Web, WFM Builder, and WFM Daemon. Application templates are used only in Configuration Manager, when installing applications.

Aux Code

See Reason Code.

Availability

A contract parameter that indicates the time period during which an agent is prepared to work. Shifts should fall within the availability period.

Agents can also make personal availability preferences. These personal preferences, if granted, override the agent's contract availability settings.

Availability Pattern

A one-week set of preferred availability, with start times and durations specified for each day. Each agent creates his or her own availability by using WFM Web for Agents.

Availability Preference

A Preference that enables an agent to request specific hours during which they are available to work for single or multiple days. Supervisors grant or decline availability preferences for the whole request period or day-by-day. If they are not granted, availability preferences are treated similarly to shift and day-off preferences. If they are granted, they override the agent's `Contract` availability settings.

Average Handle Time

Also known as AHT. The average amount of time it takes incoming interactions to be distributed to agents. You can configure this statistic in the Configuration Utility to include noninteraction time, such as `After-Call Work`, as a part of the AHT.

Average Speed of Answer

Also known as ASA. The average amount of time agents take to respond to incoming interactions. WFM uses this statistic to calculate staffing forecasts, and as a basis for contact center performance values.

Average Time to Abandon

Also known as ATA. The average amount of time that callers wait in the queue before abandonment. The calculation considers only the calls that are abandoned.

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Backup/Restore Utility

See WFM Database Utility.

Bonus Time-Off Hours

Extra time off that is assigned to an agent in addition to regularly accrued or awarded time off. Bonus time off is included in time-off hours carried over, if the allowable number of hours carried over is

large enough to accommodate it. You configure time-off rules by using the Time-Off Rules module in the WFM Configuration Utility.

Break

A short rest period during an agent's scheduled work time. Breaks can be paid or unpaid.

Budget

An estimated budget based on working hours and the hourly rate of the contact center staffing forecast. The budget is calculated in the staffing forecast, using an average of the number of working hours and the average hourly wage for each contract, multiplied by the number of agents of each contract type. The budget is also displayed in the `Schedule Summary` view as the estimated cost of a schedule.

Business Unit

A database object that represents activities performed at multiple sites. You create business units in the WFM Configuration Utility and assign already existing sites to them. A site can belong to only one business unit. Formerly called *virtual PABX*, *virtual switch*, or *virtual contact center*.

Business Unit Staffing

The total staffing requirements for a business unit. Staffing requirements are different for each activity within the business unit. A staffing requirement forecast may be calculated at the business unit level and then split to the individual sites that handle the activities. Or, you can build staffing requirement forecasts separately for each site included within the business unit.

The approach that you take will depend on the type of routing used within the business unit.

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Calculated Staffing

A staffing forecast based on an interaction volume/AHT forecast, using service-objective criteria that you specify while building the staffing forecast.

Calendar

A WFM feature located in WFM Web for Supervisors that enables supervisors with appropriate security access to view, add, modify, and delete availability, exceptions, working hours, shifts, and time off for a site, team, or agent. You can view and modify preference statuses by using the Calendar. You also set time-off limits in the Calendar module. Formerly called *Planner*.

Calendar Item

Each shift, exception, preference, and so on that appears on the Calendar. You can add and edit Calendar items and, when appropriate, change their status.

Calendar Logic

The hierarchical ranking of exceptions, preferences, shifts, working hours, time off, and availability used in the Calendar and by Scheduler. This ranking indicates to Scheduler which items must be incorporated and, among those that can be either incorporated or denied, which should be allotted first. Granted items are incorporated into schedules; Preferred items might be incorporated, depending on other scheduling constraints. The hierarchy determines which item takes priority when more than one is entered for the same agent at the same time.

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Call Volume

See Interaction Volume.

Carry-Over

A date that you define, on which a specified number of each agent's total timeoff hours (unused time-off hours plus any bonus time-off hours) are transferred forward to the new year. You must set the number of hours that can be transferred for each agent.

See also Time-Off Rule.

Comments

Information about agents, workload forecasts, staffing forecasts, and schedules that you enter in special dialog boxes within WFM Web.

Compliance

See Adherence.

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Configuration Component

A set of objects created in Configuration Manager and the WFM Configuration Utility that defines some aspect of the WFM environment.

Configuration Manager

A Genesys Framework tool that you use to set up the database environment during installation of any Genesys product, release 6 or later. You use Configuration Manager to configure WFM application settings, and connections between WFM and other Genesys components, such as Stat Server and Configuration Server.

Consistency Check

An automatic assessment for some user-entered settings that enables WFM to identify some incompatible constraints. For example, WFM checks part-day exceptions to determine whether they are valid or invalid, and it checks contract working hour and working day settings for internal consistency.

Contact Center

See Site.

Contract

Describes categories of employees for scheduling and tracking purposes—for example, full-time, part-time, seasonal, contractor, salaried, and commissioned. Contract parameters include working hours, settings for required days off, and profile agent configuration. Formerly called employment type.

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Data Aggregator

See WFM Data Aggregator.

Daylight Savings Information

Time offsets that you configure to ensure that WFM takes daylight saving time into account when creating forecasts, schedules, adherence and performance monitoring, and reports. Formerly called PABX *time offset information*.

E

Employee

See Agent.

Employment Type

See Contract.

Error

See Schedule Validation Error.

Event

A specific instance when a factor is in effect. You define an event by specifying the appropriate factor and the dates when it will affect site operations. Examples of events include advertising campaigns, catalog mailings, and holidays that affect interaction volume. You do not have to specify events for forecasting, but events provide a useful tool for fine-tuning an interaction volume forecast.

See also Factor.

Exception

Any time during an agent's schedule when the agent is not performing activity work. Examples of exceptions include long lunches, meetings, training, and child care.

See also Exception Type.

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Exception Type

A category, that you define, of time off or non-activity work that affects scheduling. Exception types are created to fit the business rules for a site. Exception types include information on compensation, whether the exception is a working or nonworking exception, and whether the exception type should be used when scheduling meetings.

See also Exception.

Exclusivity Set

See Activity Set.

Expert Average Engine

A forecasting method that uses statistical analysis of historical data to produce day-of-week, weekly, and (if sufficient historical data exists) yearly trend patterns. At least one full week of historical data is required in order to use the Expert Average Engine; at least six weeks is recommended for high-quality daily and weekly results. The impact of events, such as marketing campaigns, is applied directly to the forecast day-of-week and weekly curves. For this reason, this engine is best suited to sites with fairly stable interaction patterns.

Exporting

Enables you to save forecast and historical data to files that you specify. You perform exports by using the `Import/Export Data` module in the WFM Configuration Utility. See also Importing.

Extracting

Enables you to extract the forecast and schedule information in the Master Forecast and in the

Master Schedule in the Workforce Management database to scenarios that you specify. You extract data by using the `Publish Forecast` or `Publish Schedule` functions in WFM Web.

See also Master Forecast and Master Schedule.

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Factor

Anything that is expected to affect the interaction volume for particular activities, and therefore staff and schedule requirements. For example, a special promotion or a new advertising campaign may require additional staff. WFM takes such factors into consideration as it forecasts agent requirements and creates schedules. Events are built based on factors.

See also Event.

Filter

An option for changing the view settings of a WFM Web for Supervisors window.

Forecast

A prediction of interaction volume and average handling time for a future period, based on historical information for similar periods. If sufficient historical data is unavailable, WFM creates forecasts from templates or numbers that you enter.

Historical data is collected automatically from Stat Server for all types of transactions by using computer-telephony integration (CTI), an event-based technology, rather than automatic call distribution (ACD) sampled data. This makes it possible to forecast for any media type.

Full-Time Equivalent

Also known as an FTE. An abstract term used to quantify a forecast and budget in tangible, human terms. For information about how WFM calculates an FTE, see Endnote 1.

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Headcount

The number of agents scheduled for a certain timestep. For more information, see Number of Agents—Scheduled.

Historical Data

Records of previous contact center performance stored in the WFM database. You can import historical data that was collected prior to installation of WFM if it is in the form of comma-delimited text files (CSV format). Large amounts of reliable historical data are the most accurate basis for forecasting.

Hot Standby

A high-availability architecture that includes a second WFM Data Aggregator server that is initialized and ready to take over if the primary server terminates unexpectedly. The second server is synchronized with the first, so there is no loss of data during the transition.

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Importing

Enables you to apply previously collected historical data to new forecasts by using the `Import/ Export Data` module in the WFM Configuration Utility to import the historical data. Importing historical data is usually part of the initial WFM configuration. Afterward, WFM Data Aggregator collects historical data automatically as it runs, or, if you prefer, you can import historical data manually on a regular basis.

See also Exporting.

Indirectly Occupied Time

The percentage of time that agents are scheduled for work but are not directly interacting with customers. For example, agents might be starting their computers, or they might be away from their desks.

Interaction Volume

The number of interactions per a specific unit, such as timestep, day, month, and so on. Interactions may include not only calls, but also e-mail, faxes, Web-based chats, and so on.

Intra-Day Schedule

A section of the Schedule module that displays the schedule for the selected day(s).

Intra-Day Views

Schedule and performance information displayed in WFM Web.

The `Schedule Intra-Day` windows show agent schedules for the current day and enable you to make immediate adjustments to the schedule when necessary—for example, moving or cancelling breaks during an unexpectedly busy period.

Through graphs and tables, the `Performance Intra-Day` window displays the current day's actual versus scheduled status.

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Log Files

Files that contain information about what a component does and how it is performing. You (or Genesys Customer Care) can use log files for error tracking. Each WFM component uses its own log file, which is usually stored in the `Workforce\Logs` directory. If you are using the Framework Management Layer, you can send status information for WFM Server, WFM Builder, WFM Daemon, and WFM Data Aggregator to the `Centralized Logging` console.

Long Period

See Schedule Planning Period.

M

Marked Time

A period that you have indicated in one of the Schedule Intra-Day views as belonging to one of the marked-time types configured in the WFM Configuration Utility Marked Time module. You can configure as many marked-time types as you want.

Marked time is extremely flexible. It can be used to distinguish any period that you want to view and report on as belonging to a specific category. For example, you might use marked time to indicate overtime hours, so that you can view them in the Schedule Marked Time Report or the Schedule Marked Time Totals Report.

Master Forecast

A forecast published to the WFM database that is available to any authorized user at any time. If you want, you can extract forecast data from the Master Forecast to a scenario of your choosing.

See also Extracting.

Master Schedule

A schedule published to the WFM database that is available to any authorized user at any time. If you want, you can extract schedule data from the Master Schedule to a scenario of your choosing. You must have data published to the Master Forecast for a particular time range in order to build useful schedule scenarios. Otherwise, the Scheduler will have no target staffing requirements against which to build the schedule.

See also Extracting.

Maximum Occupancy

The maximum percentage of time that an agent is working while logged in. This is a service objective that can be specified when building a staffing forecast.

Meal

A specific break period during an agent's scheduled work time, usually paid.

Meeting

An exception type that you configure using the Meeting Planner or the Meeting Scheduler. Scheduler sets the time for meetings after you specify all attendees and meeting parameters (possible dates and time, recurrence rules, and so on). The scheduling algorithm finds the optimum time to schedule the meeting while it builds agent schedules, and it adds a Meeting exception to each attendee's schedule. You can also manually assign meetings to agents at any time.

Modules Pane

A section of the WFM Web for Supervisors and WFM Configuration Utility interfaces. You use this pane to select the module that you want to use on the working pane of the interface. The modules that are available depend on your security permissions. See also User Security.

Multi-Site Activity

A collection of activities performed at multiple physical sites. Multi-site activities enable you to view several local activities as one WFM object. The performance information is split among the sites that perform the activity. You can build interaction volume forecasts, staffing forecasts, and view contact center performance for multi-site activities. Formerly called *virtual activity*.

See also Activity and Multi-Site Activity Forecast.

Multi-Site Activity Forecast

A forecast for an activity that is composed of various single-site activities at multiple local sites. Creating forecasts for multi-site activities is slightly different than for single-site activities. Because multi-site activities are split among different sites, you must also split the forecast interaction volume and staffing requirements. Formerly call *virtual forecast*.

See also Multi-Site Activity.

Multi-Skilled Agent

An agent who is qualified to work on multiple activities, and who might therefore be performing various different types of work during a shift. Multi-skilled agents can greatly increase contact center efficiency. However, if multi-skilled agents are receiving too many interaction types to handle productively, you can control the types of activities they do during set parts of the day, using task sequences. See also Task Sequence.

Multi-Skilled Equivalent

Sometimes referred to as MSE. A WFM calculation of the number of agents required in order to handle the forecast workload, which includes and accounts for agents who have multiple skills. An agent can be scheduled to work only part of a time interval, and only the fraction of the time period during which she works is counted—and the value for staffing is expressed as a fraction.

The Multi-Skilled forecasting algorithm takes into account how many agents (with their various skill sets) could be available to work on each Activity, as well as how the occupancy of an average agent would be divided among this Activity and the other Activities on which the agent could work.

When building a schedule, WFM can optionally create the staffing forecast in MSEs while taking into account those agents for whom the schedule is being built, as well as those agents for whom schedules have already been built.

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Number of Agents

The headcount scheduled for a certain timestep. Also known as Agents in Seats. For more information, see Number of Agents—Scheduled.

O

Objects Pane

A section of the WFM Web for Supervisors and WFM Configuration Utility interfaces. You use this pane to select the specific object or objects to configure, or about which to view data, on the working pane of the interface. The objects that are available for selection on the Objects pane vary, depending on

your selection on the `Modules` pane and your security permissions.

See also Modules Pane and User Security.

Optimization

The degree to which a schedule precisely correlates staffing levels with staffing requirements. Optimization is always a goal, but you can set it to be a higher or lower priority, depending on how many agent preferences should be fulfilled. Configuring optimization allows a balance between agent satisfaction levels and workload demands.

Overlap Template

A type of forecast template that you can use to replace historical data in a forecast. For example, if you have no historical data for a certain time period, apply an overlap template to fill in the gap.

Overstaffing

More agents have been scheduled than are required for the workload.

Overtime

Hours worked over and above the standard working hours. You configure overtime rules in WFM Web for Supervisor in the `Schedule > Master Schedule > Overtime Requirements` module.

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PABX

See Site.

Paid Hours

The total number of hours that an agent works, including meals and paid breaks. This number may not correspond to the total number of hours the agent spends at work, because it does not include unpaid time, such as unpaid breaks.

Pending Schedule Changes

Changes to the Master Schedule or a schedule scenario made by a user who does not have the Approve Changes security permission enabled. Pending changes are visible only to the user who created them, and to the qualified user who reviews them and decides whether they should be included in the official version of the schedule.

Performance

A measure of the extent to which actual site indicators, such as average speed of answer, service level, interaction volume, and so on, correspond with the forecast and scheduled values. You can track performance by using the Performance module in WFM Web for Supervisors.

Planned Overhead

The percentage of time that agents are not handling interactions or performing direct contact center work. For example, an agent might be taking a break, participating in a training session, or meeting with peers or supervisors. Formerly named Working Overhead.

Planner

See Calendar.

Planner Logic

See Calendar Logic.

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Policies Object

A configuration object that defines a rule governing the work schedules of agents. `Policies` objects include agent work times, break times, available shifts, and any other constraints that affect scheduling, whether set by the company, labor unions, country or local laws, or any other source. You define these policies as WFM objects by using the WFM Configuration Utility. WFM then considers them when making forecasts and creating schedules.

Preference Fulfillment

The percentage of schedule variations requested by agents, such as days off, specific shift times, and availability, that were assigned in the schedule. Because having preferences scheduled is important for agent satisfaction, WFM enables specified levels of preference fulfillment to be included in the schedule building process. You can also set priorities for which agents' preferences are most likely to be fulfilled, based on rank, seniority, or both.

Preferences

Agent requests for particular shifts, days off, availability, and time off.

Profile

An agent type that you define, composed of a contract plus a skill set, or based on an actual agent. Scheduler uses profiles to create a type of generic schedule called a Profile Schedule to which you can then assign actual agents.

See also Profile Schedule and Scheduling, Profile-Based.

Profile Schedule

A schedule created using profiles. You can create a schedule by using only profiles, or by using a combination of profiles and actual agents. You can assign to profile schedule slots agents who are not already incorporated into the schedule as real agents.

Publishing

Publishing saves a forecast scenario to the database, which means that you can use the forecast to create agent schedules. A published forecast is available to any authorized user at any time. This forecast is called the `Master Forecast`.

Publishing a schedule saves schedule scenario data to the `Master Schedule` in the WFM database. Until you publish a schedule, it is not available for tracking in the `Adherence` and `Performance` modules.

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Quality of Service

One or more statistics that WFM uses to compare the actual values with the service objectives projected in the schedule for each activity. This includes statistics that track service level and average speed of answer. It is used for immediate activities.

R

Real-Time Agent Adherence

A WFM feature that shows monitors how well agents are complying with their schedules.

Reason Code

Information entered by an agent that supplements real-time agent states. A reason helps define the precise nature of the agent state to which it is attached. To use reasons, you must have either a switch that supports the inclusion of reason codes with Genesys TEvents or a custom agent desktop that adds reason codes. Formerly called *aux code*.

Report Viewer

A WFM module that displays all information contained in reports, prints the reports, or exports them to files in various formats.

Required Staffing

Staffing requirements that you set, in contrast to those established by WFM. You can set these

requirements well in advance for hiring and budgeting purposes, and then compare these requirements to the staffing forecast generated using historical data or templates. Use of required staffing is optional. You can enter required staffing information in the `Staffing Intraday` window or load it from the appropriate template. You can also copy it from calculated staffing forecast data.

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Rescheduling

The process of rebuilding a schedule after the schedule has been modified.

Rotating Pattern

A set of weekly schedule patterns that you can have Scheduler assign to agents. The weekly pattern can include a combination of shifts, days off, specified working hours, and availability periods. For example, you can define a weekly pattern called `Weekends Off` (`WOff`) and one called Monday and Tuesday `Off` (`MTOff`), and then create a rotating pattern consisting of a 4-week sequence of three `WOff` shifts followed by one `MTOff` shift. This ability to create rotating shift sequences permits enormous scheduling control.

Rotating Schedule

See Rotating Pattern.

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Schedule

An arrangement of shifts, breaks, meals, exceptions, and so on, based on the predicted workload and the available agent pool. WFM builds schedules that are optimized within the site's business constraints. Constraints include available people with required skills, service-objective requirements, employment contracts, business policies, and agent preferences. An optimized schedule ensures the least-possible overstaffing while still meeting service objectives.

Schedule Coverage

How well a schedule covers the forecasted staffing requirements.

Schedule Planning Period

A period of time that you set, from two to six weeks or a calendar month, which Scheduler then uses when assigning working hours and required days off. The schedule planning period enables supervisors to ensure that agents receive the number of hours and days off specified in their contracts. WFM runs a consistency check to identify cases in which the settings for weekly working hours are inconsistent with those assigned for the schedule planning period.

> ### Important
> Although the consistency checks are designed to eliminate as many inconsistencies as possible, some configuration discrepancies might not appear until after you build a schedule.

See also Consistency Check.

Schedule Server

A component that no longer exists in Genesys WFM 7.0 and later. See WFM Builder.

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Schedule State Group

A collection of schedule states that is linked to a site. Schedule State Group configuration is very important in order to correctly track adherence. You can include the following schedule states in schedule state groups: breaks, meals, exception types, and activities configured for the site, `Day Off`, `Time Off`, and `No Activity`. You associate each schedule state group with one or more Genesys events, such as `CallRinging` or `WaitForNextCall`, and you can also include an additional reason code (formerly an *aux code*) that further identifies what the agent is doing.

See also Reason Code.

Schedule Summary

Both a view and a report in WFM that display a schedule's service objectives, interaction volume, average handling time, budget, and number of agents.

Schedule Validation Error

A scheduling problem severe enough to terminate the schedule building process. Errors are usually caused by incorrect configuration information, but some are more serious and must be reported to Genesys Customer Care. For a complete list of errors, see "Schedule Validation Errors" in *WFM Web for Supervisors Help*.

See also Validation.

Schedule Validation Warning

A warning issued during scheduling. The scheduling algorithm ignores the encountered problem and goes on. When the scheduling process generates (and stacks) too many warnings, memory management problems can yield unrecoverable errors.

See also Validation.

Scheduling, Profile-Based

A scheduling method that enables the creation of blank schedules—that is, schedules that are constructed from empty shift slots rather than by assigning actual agents to the specific shifts. Agents are assigned to the schedule slots after the schedule is built. Using blank schedules, you can construct schedules before hiring employees, or have agents bid on desirable schedule slots.

See also Profile Schedule and Profile.

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Security Access

Limitations for certain users on access to information about some sites or objects. You configure security settings in the User Security module in the WFM Configuration Utility. You can customize user security so that only sites and objects for which the user has security authorization appear in WFM tree views.

See also User Security.

Service Level

A customer service goal that you define as the percentage of interactions handled within a time limit. `Service Level` is one of the service objectives that you can set when building a staffing forecast. WFM will receive actual Service Level statistics from Stat Server, and several views and reports within WFM allow you to compare actual vs. forecasted and scheduled Service Levels.

Service Objective

The customer service goals that you set for `Service Level`, `Occupancy`, `Average Speed of Answer`, `Abandonment%`, and so on. You set values for these goals in the Forecast Staffing Build Wizard in WFM Web for Supervisors.

See also Service Level, Maximum Occupancy, Average Speed of Answer, and Abandonment Percentage.

Shift

The possible work times at a site. Shifts are defined by time of day, duration, days of the week, and so on. For example, you might have first, second, swing, night, front-of-week, or back-of-week shifts.

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Single-Skill Equivalent

Sometimes referred to as SSE. A WFM calculation of the number of agents required in order to handle the forecast workload, with the assumption that each agent has only one skill. Because multi-skilled agents are more efficient than single-skilled agents, WFM factors in an efficiency constant to reflect accurately the equivalence between single-skill equivalents and the actual agents who are being scheduled.

See also Multi-Skilled Equivalent.

Site

The locations associated with an enterprise. Sites can sometimes correspond to switches in Configuration Manager. Users must have appropriate security access to view and make changes for sites. You can associate multiple sites to form a business unit. Formerly called *contact center* or *location*.

See also Business Unit.

Site Rule

Defines a site-specific parameter. You can set the `Minimum Duration Between the End of the Day and Start of Next Working Day`, `Maximum Start Time Difference for Members of the Same Team`, and `Schedule Planning Period Type` parameters on the `Contracts General` tab.

Skill

A work-related expertise, such as `Billing` or `Spanish`. Each work activity in WFM has a set of one or more skills and skill levels associated with it, and an agent must possess those skills in order to be scheduled to work on that activity. You define skills in Configuration Manager, and they become available in WFM after you synchronize the WFM database with the Configuration Database in the WFM Configuration Utility. Skill updates appear in WFM immediately, through automatic synchronization that WFM Data Aggregator performs. If a skill is required for an activity, all agents scheduled for that activity must have that skill.

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Soft Restart

A feature that enables WFM Data Aggregator to accommodate configuration changes without requiring a restart.

Split Interaction Volume

Division of the interaction volume forecast for a multi-site activity among the single-site activities that make up the multi-site activity. If several single-site activities are open, WFM splits the volume by using the ratio of the number of agents available to work each single-site activity, as determined by their skillsets, whether they are multi-skilled, and their availability at a given timestep.

You lose coverage for the predicted interaction volume if none of the singlesite activities is open during a particular timestep when the multi-site activity is open and has a forecast interaction volume.

See also Multi-Site Activity and Multi-Site Activity Forecast.

Split Staffing

A division of staffing from the staffing forecast scenario of a multi-site activity. If a multi-site activity has one or more associated activities, you can use the Staffing Split Wizard to split the result between associated activities after building the calculated and required staffing. This functionality is available only within a forecast scenario. See the ""Forecast > "Forecast Scenarios" > "Staffing Split

Wizard" topic in *Web for Supervisors Help*.

Staffing

The number of agents with certain skills required in order to meet a certain interaction volume at a certain time.

Statistic

WFM Data Aggregator collects, from Stat Server, information about statistics that are specific to WFM, such as `Interaction Volume`, `Handle Time`, and `Quality of Service`. Use these statistics to assess contact center performance and agent-adherence levels, as well as to build historical data for future forecasting.

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Suitability

The extent to which a schedule minimizes occasions when the number of agents working is greater (overstaffed) or less (understaffed) than the number necessary to handle the actual workload.

Swapping

A feature that enables contact center managers to go into a published schedule and manually exchange agent schedule assignments. This feature enables customized preference fulfillment in cases where an agent with less seniority or a lower rank has had a preference granted in place of a more senior or highly ranked agent.

Synchronization Constraint

A WFM parameter that you can set to ensure that an agent starts each workday at the same time for a specified number of weeks, or for an entire schedule period. This feature enables more fixed, predictable schedules. Synchronization includes a `Flexibility` option, which allows Scheduler to vary the schedule start and end times within a specified range. Allowing some flexibility optimizes schedules.

Synchronization with Configuration Manager

A process that brings the data in the WFM database into correspondence with the data in the Configuration Database. Synchronization enables changes made to agent, site, users (supervisors or managers), time zone, or skill information in Configuration Manager to appear in WFM. You can use the WFM Configuration Utility to manually perform a complete synchronization or to synchronize only certain object types. In addition, WFM Data Aggregator automatically updates certain agent information and agent skills settings without the need for manual synchronization.

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Task

An activity that is selected as part of a task sequence.

See also Task Sequence.

Task Sequence

A defined period of time during which agents can work only on a specified set of tasks (called an activity set). Task sequences enable you to control how much the nature of an agent's work changes during part of a day. You can prevent agents from being asked to jump constantly from activity to activity, a situation that can result in agent confusion and fatigue, and lower productivity.

You configure task sequences for shifts. After a task sequence is configured, you can assign it to any compatible shift in the same site.

See also Activity Set.

Team

A group of agents that is defined to suit scheduling and business requirements. You can organize teams by agent skill sets, schedule, sales targets, achievements, geographies, or any other factor—for example, tax-exempt bond fund specialists, e-mail agents, Christmas sales drive, and platinum customer care. An agent can belong to only one team.

Template

A set of data that you configure as a basis for forecasting, typically for sites that have little or no historical activity, or those with historical data that is incomplete because of outages. Template types include: `Interaction Volume`, `Average Handling Time`, `Service Level`, `Interaction Volume Data Overlap`, `Planned Overhead`, `Indirectly Occupied Time`, `Maximum Occupancy`, and `AHT Overlap`. Use the `Staffing` template to set intra-day staffing requirements.

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Threshold

The amount of time before an agent is supposed to enter a particular schedule state; or, after the schedule state ends, the amount of time that the agent can be in that state and still be considered to be adhering to the schedule. For example, suppose that an agent is scheduled to start a shift at 12:00 PM, and the `Start Before` threshold is set to `5 minutes`. If the agent starts the shift at 11:54 AM, which is beyond the 5-minute threshold, this appears on the adherence reports as a non-adherent event.

Time Off

Formerly called *vacation* and of only one type. Now, you can configure multiple types, with different parameters and different time-off rules. In WFM Web for Agents, agents use the `Time Off` module to view, request, and remove time off.

See also Time-Off Type, Time-Off Limit, and Time-Off Rule.

Time-Off Limit

A feature located in the `Calendar` module of WFM Web for Supervisors. Use it to set the maximum number of agents in each category (`Activity`, `Team`, and `Site`) who might have time off during a particular timestep. You can set only one time-off limit for each time-off type. Formerly called *vacation limit*.

Time-Off Rule

Parameters that define the accumulation of accrued time off, the allocation of awarded time off, when and how many time-off hours can be carried over from year to year, the granting of time-off requests, and so on. You create these rules and associate them with agents in the `Time-Off Rules` module of the WFM Configuration Utility. Formerly called *accrual rule*.

Time-Off Type

A module in the WFM Configuration Utility that you use to create the different time-off types that you want to assign to agents and track using reports. You can configure one or more time-off rules for each time-off type.

See also Time-Off Rule.

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TimeProfile

A Stat Server parameter that WFM Data Aggregator uses to order statistics for WFM activities based on a specific interval of time. This time interval is configured in Stat Server as the `TimeProfile` parameter.

TimeRange

A Stat Server parameter that WFM Data Aggregator uses to request that service-level statistics be calculated based on the specified time interval. Usually, service level is calculated as X% of calls answered in Y seconds. The Y seconds must be configured as the `TimeRange` parameter.

Trading

Enables agents with compatible schedules to trade them. Agents can do this by using the WFM Web for Agents interface. Supervisors can view, approve, and decline trades by using the WFM Web for Supervisors interface. Agents can propose trades to all agents with compatible schedules, or they can send trade invitations only to specific individuals. Agent trades that fulfill all constraints are automatically accepted, reducing the time needed for supervisors to review trades.

Tree View

The lower-left pane (the `Objects` pane) of the WFM Configuration Utility and WFM Web interfaces contains a tree structure that displays some objects. The top level in the hierarchy represents the enterprise, and under this level you will see objects associated with whichever module is selected on the `Modules` pane, which is located above the `Objects` pane.

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U

Understaffing

Fewer agents have been scheduled than are required for the workload.

Universal Modeling Engine

A forecasting method that uses a complex algorithm to identify trends and patterns in historical data, and then creates a forecast based on these trends and patterns. The Universal Modeling Engine requires more than one year's worth of historical data. The engine is configured to disregard days in the historical data that contain special events if no such events occur during the forecast period. This eliminates some misleading "noise" from the forecasts. If an event occurs in the forecast, the impact is extracted from historical data and applied to the baseline forecast. The Universal Modeling Engine is best suited to sites with a large quantity of high-quality historical data.

Unplanned Overhead

The percentage of agents who are being paid, but who are not working. For example, an agent may be on time off, out sick, or on a company-sponsored holiday. You can provide an estimate for unplanned overhead when building a staffing forecast, and then compare this to the actual unplanned overhead in the Actual Overheads Report. The unplanned overhead percentage is also used as part of the Estimated Budget calculation.

> ### Tip
> Unplanned overhead percentages do not affect the staffing requirement forecast.

Formerly named *Nonworking Overhead*.

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User Security

A module in the WFM Configuration Utility that you use to set security access limitations for all nonagent users. You can limit access to specific sites, teams, activities, and so on. In some cases, you can configure some users to have view-only access to WFM objects, and others to have full access. You can also grant permission to edit the schedule without having the changes incorporated into the official version of the schedule.

See also Security Access, Pending Schedule Changes, and Modules Pane.

User Time Zone

A time zone other than the local one. You can choose to have the timesteps in the Performance `Intra-Day` and `Graphs` windows labeled with the time in the user time zone. You do this by selecting the `User Time Zone` button on the `Actions` toolbar or selecting `User Time Zone` from the `Actions` menu.

For example, suppose that your local contact center is in Pacific time, and the current time is 1:00 PM. Furthermore, suppose that the user time zone is eastern standard time, and the current time is 4:00 PM. If you select `User Time Zone`, the labels for the current timestep in the Performance `Intra-Day` and `Graphs` windows change to 4:00 PM. The performance data does *not* change.

Additionally, reports that you view after selecting `User Time Zone` display timesteps that correspond to the time at which the events reported on happened in the user time zone.

Formerly called *alternative time zone*.

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V

Vacation

See Time Off.

Validation

The process that Scheduler uses to check schedule settings against various constraints, such as activity open hours and agent availability, when you build a schedule. If there are inconsistencies that might cause the schedule you have configured to be unworkable, Scheduler generates warnings or errors.

If there are only warnings, Scheduler builds the schedule and displays the warnings in the `Schedule Validation` window. These short warnings indicate what you should do to correct the problem. For a list of schedule validation warnings, with explanations of their meanings, see the "Schedule Validation" topic in the *WFM Web for Supervisors Help*.

See also Schedule Validation Warning.

More serious inconsistencies result in schedule errors, which prevent Scheduler from publishing the schedule at all. For a list of schedule validation errors, with explanations of their meanings, see the

"Schedule Validation" topic in the *WFM Web for Supervisors Help*.

See also Schedule Validation Error.

Version

Information about the release number and database version of the instance of the WFM Configuration Utility, WFM Database Utility, or WFM Web you are running. To see this information, click About on the main toolbar in any of these applications. The About window displays the program release number, database version, database update status, data source, and user name. If the WFM database has not been updated and therefore is not compatible with the current release of WFM, the `Database Update` field in the Configuration Utility About window appears in red.

Virtual Activity

See Multi-Site Activity.

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Virtual Agent

Not used in Workforce Management 7.1 and later.

Virtual Contact Center

See Business Unit.

Virtual Forecast

See Multi-Site Activity Forecast and Split Interaction Volume.

Virtual Switch

See Business Unit.

Virtual Team

Not used in Workforce Management 7.1 and later.

Virtual Workforce

Not used in Workforce Management 7.1 and later. *See* Business Unit Staffing.

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W

Warning

See Schedule Validation Warning.

Weekly Pattern

A sequence of days configured to be part of a rotating pattern. Weekly pattern settings include days off, shifts, start times, and paid hours.

WFM Builder

A WFM server that builds the WFM schedules. This functionality was formerly provided by Schedule Server.

WFM Configuration Utility

A WFM application that you can use to configure enterprise objects such as Agents, Activities, and Rotating Patterns; Policies objects such as working hours, activity open hours, and time-off rules and user security settings; and that you can use to import and export historical data. This functionality was formerly provided in the Workforce Manager application.

WFM Data Aggregator

A WFM server that collects data for each activity, such as the number of interactions or the average handling time. The data is compared to planned values in the Adherence and Performance modules.

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WFM Database Utility

A utility that includes various database-related functionality, including database creation, backup/restore, updating, and maintenance. The backup feature copies all of the WFM database tables into a local file in Microsoft Access database (.MDB) format. The restore feature saves the data from the .MDB file to the WFM database.

WFM Reports Server

A WFM server dedicated to creating the WFM reports. Starting with Workforce Management 7.2, a separate WFM Web application is used as the dedicated reports server. In pre 7.2 releases, WFM contained a WFM Reports Server component.

WFM Server

A server that manages all the requests from the WFM Web application—for example, retrieving agent schedules upon request and providing them to WFM Web. WFM Server manages the requests and responses from WFM Web applications, from the WFM database, and from all the other WFM components (such as WFM Builder). WFM Server also writes to the WFM database any changes made in the WFM Web Schedule window.

WFM Web

The WFM component that enables agents and supervisors to harness the power and convenience of the Web to access and use WFM. WFM Web makes realtime and past performance data available whenever it is needed. WFM Web has two parts: Supervisor and Agent.

Supervisors can use WFM Web to create forecasts, create and monitor schedules, make schedule changes, view and approve or deny schedule trade requests, view contact center performance, monitor real-time agent adherence, and view reports.

Agents can use WFM Web to check scheduled activities and working hours; communicate preferred shift, working hours, and time-off requests to administrators; and make schedule trades with other agents.

What-If Scenario

A feature within the WFM Web Performance module that you can use to create a model of intra-day contact center performance under different conditions that you configure. With the What-If Scenario feature, you can modify several performance values and then recalculate the service-objective impact based on the modified data. For example, you can use a what-if scenario to assess the potential impact of a change in site staff attendance, or the effect of a higher call volume on service objectives.

Workforce

See Staffing.

Workforce Access Group

Not used in Workforce Management 7.1 and later. *See* User Security.

Working Agents

Those agents who are logged in.