# Workforce Management Administrator's Guide

## WFM Configuration Objects

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# WFM Configuration Objects

WFM Web's **Configuration** module enables you to configure a number of object types. The following sections briefly describe each object type and offer some considerations to assist you in planning your configuration.

> ### Important
> The following sections provide only brief introductions to these objects and focus on aspects relevant to deployment planning. For a full description, see *Workforce Management Web for Supervisors Help*.

## Agents

When you are setting up or making changes within your contact center you must plan for and manage the contact information, agent IDs, and profiles for all agents in the various sites within the enterprise. WFM Web provides many configuration panes and categories that you can use to manage agents effectively. See also **Configuration > Agents** in the *Workforce Management Web for Supervisors Help*.

## Organization

Use the **Organization** module to configure sites, business units, and time zones. To configure this module, determine the sites that belong to business units. Decide on the site properties, the maximum seats, the Data Aggregator and WFM Server the site uses, the switch you will use to collect statistics, and so on. Collect information about agent team and site associations, as well as agent settings, such as rotating pattern (if any), contracts, and rules for the accrual of accrued time off.

Keep in mind that there are many WFM configuration objects that are associated with a site, including **Rotating Patterns**, **Contracts**, **Activities**, **Time-Off Types**, **Time-Off Rules**, **Exception Types**, and more. When you move an agent from one site to another, you must reassign that agent to a new Contract, Time-Off Rules, and new Rotating Patterns—if these were previously assigned. You must take this action to correctly schedule the moved agent under the new site.

### Business Units

At times, you might need to create business units. To create and configure new ones, see the **Configuration > Organization > Business Units > Creating Business Units** in the see *Workforce Management Web for Supervisors Help*.

## Sites

Sites can be equivalent to switches, which are defined in Genesys Administrator and imported into WFM. You can also create sites in WFM that are unrelated to a switch. This is appropriate when switches do not correlate with your company's organization. For example, a single location could be divided into multiple entities to reflect divisions along business unit lines.

To configure sites in your enterprise, see the WFM Web for Supervisors **Configuration > Organization** module.

## Teams

Within new or existing sites, you can create and add agents to teams. Creating teams enables you to group agents meet scheduling and business requirements. You can organize teams by agent skill sets, schedule, sales targets, achievements, geographies, or any other factor. For example, email agents, Christmas sales drive, or platinum customer care. An agent can belong to only one team at a time. Use the **Sites > Properties** pane in Web for Supervisors to create teams.

## Time Zones

*Time zones* are set up in Genesys Administrator and imported into WFM during synchronization. You can assign time zones to business units only. You can also configure a default time zone, for efficiency in configuring new objects, and a user time zone, which is used as the alternative time zone in WFM Web Performance views. All newly created sites and business units use the default time zone, unless specified otherwise.

To learn how to configure and work with Time Zones, see the **Configuration > Time Zones** in the *Workforce Management Web for Supervisors Help*.

# Schedule-State Groups

A *schedule-state group* is a collection of schedule states that is linked to a site. These include breaks, meals, exceptions, activities, time off, and so on. You can group these, and then associate the group with one or more Genesys states.

Additionally, you can configure adherence thresholds for this schedule state group, which define when an agent should be considered to be non-adherent to the schedule states contained in the group.

To configure schedule-state groups, determine what schedule states you are using, what are the most logical groupings, and which Genesys state(s) best corresponds to each group.

To learn how to configure Schedule State Groups and Adherence Rules for them, see the **Configuration > Schedule State Groups** in the *Workforce Management Web for Supervisors Help*.

# Activities

*Activities* are defined as different categories of work that comprise the total workload for a contact center. Workload and staffing forecasts are created for each activity. Each site configures its own activities, to take into account of local conditions. All agent work that is forecast and scheduled must be assigned to an activity.

Activities can take various forms. They might describe types of work, such as inbound calls or email; groups of customers served, such as preferred customer care; or work times, such as overnight. You can also use activities for non-CTI work. Each activity is then associated with one or more preconfigured skills. Because activities are a fundamental unit for forecasts and schedules, it is critical that you configure them accurately.

## Maximum Simultaneous Users for Activities

The Maximum Simultaneous Users feature limits the number of agents that can be scheduled for an activity, even if the workload requires more. Maximum Simultaneous Users can be understood as a way to prevent excessive staffing for some activities so that the agents can be moved to more important activities, even if it leaves some less-important activities understaffed. This feature is best used when the contact center is understaffed as a whole. As the Maximum Simultaneous Users value is reached, agents are then assigned to other activities.

> ## Important
> Only use the Maximum Simultaneous Users feature in a multi-skilled environment.

## Activity Sets

The *Activities* module enables you to set activity open hours and staffing constraints. You can also use it to create activity sets (previously called exclusivity sets).

Activity sets provide a means to combine activities into groups for multi-skilled scheduling. Activity sets are associated with sites. Any agent can work on an activity set if that agent has the skills required for the activities included in the activity set. When performing activity set work, agents must perform only the activities included in the set for a specified period of time.

When planning your deployment, consider which activities could logically be grouped into activity sets.

## Multi-site Activities

Multi-site activities, formerly called virtual activities, are performed at multiple physical sites. They enable you to view several local activities as a single 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.

## Activities Statistics

Administrators and supervisors can associate Stat Server statistics with activities and multi-site activities in WFM Web. WFM uses the WFM Data Aggregator to track four statistical categories: Interaction Volume, Abandonment Percentage, Quality of Service, and Handle Time. These statistics are written to the WFM database, providing the historical data necessary for WFM Forecasting, Scheduling, Performance monitoring, and Adherence monitoring.

Because WFM Data Aggregator receives its statistics from the Genesys Stat Server, it supports a very flexible configuration. In WFM Web you associate Stat Server statistics with activities. These Stat Server statistics may be *out-of-the-box* or customized statistics.

For example, you can sum up values from any set of statistics you want, such as totalTalkTime + totalHoldTime + totalAfterCallWorkTime. This type of flexible configuration overcomes the limitations of ACD switch reports and integration, allowing you to choose the statistics that best represent the work associated with servicing each customer interaction.

# Skills

You can configure interactions to be routed to specific agents within a contact center, based on skill definitions.

For example, you may want to have incoming interactions go first to an agent at the highest level of a certain skill. If no agent with that skill level for that activity is available, then the interaction can be routed to an agent with the next highest level of that skill. If no agent is available at that level, then the interaction can be routed to the next available agent, regardless of the agent's skill level for the activity.

The contact center manager can decide whether to staff for the higher skill levels, or whether to staff so that any agent can handle the interaction.

Skills are defined and assigned to agents in Genesys Administrator, then imported into WFM automatically during synchronization. In WFM, skills are assigned to business units. A skill can be assigned to one business unit only and can be assigned only to activities and profiles under this business unit. To learn how to assign skills to business units, see the **Configuration > Skills** topic in the *Workforce Management Web for Supervisors Help*.

## Important

After you update the WFM database to 8.5.1, skills are no longer assigned to specific business units. For example, if you previously assigned a skill to BU1, you cannot use this skill for activities under other business units, but you can use this skill for activities and profiles under BU1.

## Matching Skills and Activities

Activities often correspond to skills but may also correspond to agent skill levels. Choosing an

appropriate strategy for a contact center's activities allows for improved staffing decisions.

For example, in a simple scenario, the relationship among the queue, skills, and activities is a 1-1-1 correspondence. As things get more complex, the relationships get more complex. Activities consist of multiple skills, and each site has many activities associated with it. The goal is to find the best combination of relationships to meet staffing requirements.

## Users

*Users* are supervisors and other persons who are not agents. They are divided into two groups:

- Users who have been imported into WFM (WFM users).
- Users who are configured in Genesys but not selected as WFM users (Genesys Users).

In WFM Web you can create a list of existing WFM users or import Genesys users from Genesys Administrator. You can configure user properties, and assign security roles and privileges to them, enabling access to specific business units, sites, and teams within the enterprise.

Before you import Genesys users into WFM, ensure you understand the how the user's security rights and privileges are impacted by the move. Be sure to read the topics Roles and Genesys Administrator Objects Imported to WFM.

Users are configured in the WFM Web for Supervisors **Configuration > Users** module.

## Roles

Workforce Management (WFM) uses roles and privileges to manage user access to WFM functionality. WFM has its own security/access rights system that defines the objects and modules that each WFM supervisor user can access in WFM. In addition, WFM implements tenant security for the objects that are shared with Genesys Configuration Layer.

WFM implements security/access as follows:

- If the user belongs to **Enterprise** in Genesys Administrator, all objects are accessible to the user in WFM, if the appropriate WFM access rights are assigned.
- If the user belongs to a **tenant**, the WFM user has access to object under that tenant only, even if the WFM access rights are assigned for related objects.

### Important
WFM follows tenant access rights only (and no other Configuration Layer access rights).

User security roles are configured in the **Configuration > Roles** module, enabling you to configure security settings for all supervisors (that is, all non-agents who use WFM). It groups role privileges into the following categories: **General**, **Configuration**, **Policies**, **Calendar**, **Forecast**, **Schedule**, **Trading**, **Performance**, **Adherence**, **Reports**, and **Notifications**. Under each category are various options.

For example, **Notifications** is an option under the **Configuration** category. If a user is assigned the **Notifications** privilege, that user can then access the **Notifications** module in WFM Web. Users without this permission cannot access and therefore cannot modify the configuration of email notifications.

## Important

There is a distinction between the **Notifications** category and the **Notifications** privilege under the **Configuration** category. For further clarification, see **Configuration > Roles** in the *Workforce Management Web for Supervisors Help*.

The user security settings allow for a great deal of flexibility. You can specify which sites and business units, teams, and so on, the user can access. You can configure calendar, forecast, and schedule access; read-only access; or full access.

In addition, you can enable users to make only pending schedule changes—that is, schedule changes that require approval from a qualified user before they are incorporated into the **Master Schedule**.

To configure user security settings efficiently, determine the access levels appropriate for all users. You can change settings at any time, as necessary. You can also use security roles to more easily configure security settings for users, by creating a Security Role, assigning privileges to it, and then assigning one or more WFM users to that security role.

When importing users, administrators will configure a security role. All new users added to the WFM system will be assigned to this security role—and will be limited to its access permissions. Roles can be changed at any time. See the **Configuration > Roles > Creating Roles** in the *Workforce Management Web for Supervisors Help*.

For information about how to assign roles and privileges for individual agents or groups of agents, see Managing WFM Roles and Privileges in GAX.