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Workforce Management Administrator's Guide

Using Email Notifications

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Using Email Notifications

This topic provides information about how to use the Notifications module in Workforce Management (WFM) Web for Supervisors to configure email notifications, by site, for the following types of events:

- Schedule trade status changes—Agents and supervisors who are affected by schedule trade proposals or responses can receive these notifications.
- Time-off request status changes—Agents and supervisors who are affected by time-off requests can receive these notifications.
- Schedule modifications—Agents who are affected by schedule changes can receive these notifications.
- Time-off bidding changes—Supervisors and agents who are affected by time-off bidding status changes can receive these notifications.

Preparing to Send Notifications

WFM Daemon, a standalone server component, sends out notifications to agents and supervisors.

By default, WFM does not send out notifications to agents and supervisors. There are a few things you need to do before WFM sends them.

For example, agents and supervisors who are to receive email notifications must have their email addresses configured. These email addresses are stored as part of the **Person** object in the Genesys Configuration Database and are synchronized into WFM automatically.

Supervisors must have the appropriate security rights to configure notifications. See [Configuration Role Privileges](#) in the *Workforce Management Web for Supervisors Help*.

Additionally, WFM must be set up properly and connected to a customer-supplied SMTP server. For details about how to configure WFM Daemon to send notifications, see [WFM Daemon Options](#). After you complete these steps and the [procedures](#) below, WFM sends notifications of the selected type.

Finally, you must select at least one site to send notifications of a given type in the **Associated Sites** tab in Web for Supervisors **Notifications** view.

Rules for Sending Notifications

WFM Daemon uses specific rules for sending each of the four types of notifications, see in the [Rules for Sending Notifications](#) in the *Workforce Management Web for Supervisors Help*.

Users must have the appropriate security rights to receive notifications. See [Notification Role Privileges](#) in the *Workforce Management Web for Supervisors Help*.

Setting Up Email Notifications

To set up email notifications, complete all of the procedures in this section.

Creating and Configuring WFM Daemon

Purpose: To create and configure the **WFM Daemon Application** object.

Start of Procedure

1. In Genesys Administrator, create the **WFM Daemon Application** and install it.
See [Creating Application Objects Manually](#).
2. Configure the WFM Daemon's connection to the **WFM Server Application**.
See [WFM Component Connections](#).
3. Configure the SMTP server settings for the WFM Daemon.
See the [WFM Daemon's \[SMTP\] configuration section](#).

End of Procedure

Configuring a Security Role

Purpose: To create a user security role to access email notifications.

Start of Procedure

1. In WFM Web for Supervisors' **Configuration** module, select **Roles**.
2. In the Role pane, click **New**.
A new security role appears in the Role pane with a default name.
3. In the Role Privileges pane, change the **Name** of the role (if desired).
4. In the list of Role Privileges, expand **Notifications** and check the boxes beside the privileges you want to assign to this role.
Be sure to uncheck all privileges in the entire list that you do not want to assign to this role.
5. Click **Save**.

End of Procedure

For a complete description of the WFM security roles and privileges, see **Roles** in the [Workforce Management Web for Supervisors Help](#).

Assigning a Security Role to a User

Purpose: To assign a security role to a user, enabling access email notifications.

Start of Procedure

1. In WFM Web for Supervisors' **Configuration** module, select **Roles**.
2. At the top of the Role Privileges pane, click **Users**, and choose one of the following:
 - Click **Assign Users** to assign a WFM user to this role.
A new pane opens, containing a list of WFM users.
 - Click **Import Genesys User** to assign a Genesys user to this role.
A new pane opens, containing a list of Genesys users (in Genesys Administrator).

New users are automatically granted access to all modules, objects, and sites
3. Select the users you want to assign to this role and click **Apply**.
4. In the Users pane, click **Save Now**.

End of Procedure

Adding E-mail Addresses to the WFM Database

Purpose: To add supervisor and agent email addresses to the WFM Database, so they can receive notifications.

Prerequisite: Supervisor and agent email addresses have been added to the WFM Database.

Start of Procedure

1. In Genesys Administrator, add these email addresses to the **Supervisor** and **Agent person** objects.
After WFM synchronization, the email address will be available in the WFM Database.

End of Procedure

Enabling Notifications in Web for Supervisor

Purpose: To configure Web for Supervisors to enable notifications.

Start of Procedure

1. In Web for Supervisors' **Configuration** module, select **Notifications**.
2. Select **New**.
3. In the **Type** drop-down list, select a notification type.
4. Click any of the **Token** buttons to add them to the **Subject** field for all notifications of this type.
5. Populate the **Message Body** field for all notifications of this type.
You can change the text in the subject and message body or keep the default.
6. Click the **Associated Sites** tab.
7. Check the sites for which you want to enable notifications.
8. Click **Save**.

If the WFM Daemon is running and properly connected to a running SMTP server, you can now use

the feature. Check WFM Daemon's status in the Windows Services Control Panel or through the Solution Control Interface (SCI).

End of Procedure

For additional information about notifications, including descriptions of the rules that generate them, see [Notifications](#) in the *Workforce Management Web for Supervisors Help*.